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LABS

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TIAA-CREF

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DEV-1 rtc-collab-eclipse rrc-reviewer-web-Labs-4.0.5-091614

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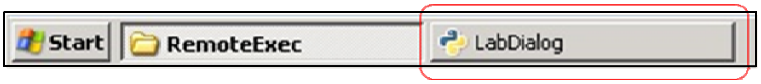
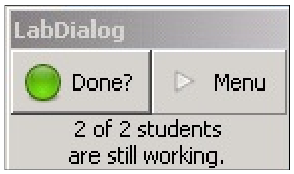
Lab: Course Introduction

Setup

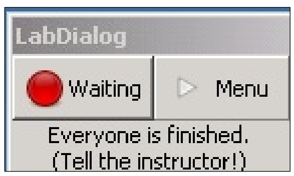
1. Find the Windows task bar at the bottom of the screen.



2. Click the **LabDialog** button to display the Lab Dialog panel.



3. Click **Done** to indicate you've finished the lab.
   - The LabDialog panel displays the Waiting state.



Lab: RTC Logon for Eclipse Users

Setup

Your team invitation, which would normally be emailed to you, is in a text file on your desktop.

1. Open the text file that contains your Rational Team Concert invitation.
   - Find and open the **Marco.txt** file on your desktop.
   - Leave it open until after you are directed to copy the contents.

Open the Eclipse workbench

1. Start Rational Team Concert Eclipse interface.
   - Find and double click the **RTC Eclipse Client** icon on your desktop.
2. Click **OK** to accept the suggested workspace.
3. Close the Welcome tab.
   - Click the **x** on the **Welcome** tab.

Connect to RTC with a team invitation

1. Start the team invitation wizard.
   - Click **Accept Team Invitation** in the upper-left corner of the Eclipse workbench.
2. Enter your team invitation text.
   - Copy the contents of **Marco.txt**.
   - Paste the contents into the invitation window.
   - Click **Finish**.
3. Enter your user ID and password.
   - User ID: `marco`
   - Password: `marco`
   - Uncheck **Save password**.
   - Uncheck **Automatically log in**.
   - Click **OK**.

Verify that the login completed successfully

1. Wait for the logon process to complete, and then find the **JKE Banking** project folder.
   - The **JKE Banking** project folder is in the Team Artifacts view below the Repository Connections folder.
2. Display your repository connection.
   - In the Team Artifacts view, expand the **Repository Connections** folder, and verify that your connection, **marco@localhost**, is visible.

Cleanup

1. Close the JKE Banking Project Area tab.
   - Click the **x** on the **JKE Banking (Change Management)** tab.
2. Click **Done** to tell the instructor you've completed the lab.

Lab: Eclipse Window Controls

Open, close, and resize windows/views

1. Resize the Team Artifacts view.
   - Hover the cursor over the right boundary of the **Team Artifacts** view until the cursor becomes a double-ended arrow. ↔
   - Left click and hold, while moving the cursor right to increase the size of the view.
   - Resize the pane until the full names on its three tabs are visible.
2. Expand the Team Artifacts view to full screen.
   - Double click the **Team Artifacts** tab.
3. Restore the Team Artifacts view to original size.
   - Double click the **Team Artifacts** tab again.
4. Close Team Artifacts view.
   - Click the **x** on the Team Artifacts tab.

Reset the perspective

1. Reset the current (Work Items) perspective.
   - Click **Window** → **Reset Perspective…**
   - Click **Yes**.
   - Verify that the Team Artifacts tab is restored to its original size and location.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Navigating RTC Projects

Expand project folders

1. Expand the **JKE Banking** project folder.
   - The **Builds** folder contains build definitions for invoking development builds.
   - The **Enterprise Extensions** folder contains metadata and operations for interfacing with IBM z and power systems.
   - The **Plans** folder provides access to work item tracking plans/views.
   - The **Reports** folder contains a number of standard business reports.
   - The **Source Control** folder contains source streams you have permission to access.
   - The **Work Items** folder contains queries for finding/accessing work items.
2. Collapse the **JKE Banking** project folder.

Open user profile

1. Find your current database connection.
   - Expand the top folder in the Team Artifacts view. Your current connection is **marco@localhost**, which is a combination of your username and the machine hosting the database to which you are connected.
2. Display your user profile.
   - Right click **marco@localhost** → **Open My User Editor**
   - Click on each of the tabs found at the bottom of the User editor.
   - Close the User editor tab.

Connect/disconnect projects

1. Connect to the **Scrum** project.
   - Right click **marco@localhost.com** → **Manage Connected Project Areas…**
   - Select the **Scrum** project.
   - Unselect the **JKE Banking** project.
   - Click **Finish**.
2. Reconnect the **JKE Banking** project.
   - Use instructions from previous step to connect only the **JKE Banking** project.

Log out/log in

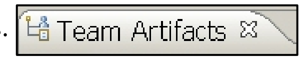
1. Log out.
   - Right click **marco@localhost.com** → **Log out**
2. Log in as Marco.
   - Right click **marco@localhost.com** → **Log in**
   - Enter Password: `marco`
   - Click **OK**.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Work Item Basics

Setup

1. Verify user and project.
   - User: **marco**   Project: **JKE Banking**
2. Expand the Team Artifacts view to the **shared predefined** queries. 

   - JKE Banking → Work Items → Shared Queries → Predefined

Run an initial query, and open an item

1. Run (double click) the query **Resolved by me**.
   - Work items you have resolved are listed in the Work Items view. 

2. Open work item **15**.
   - In the Work Items view, double click work item 15, **Login field is too small**.
3. Expand the defect to maximum window size.

Create a new work item

1. Create a new **Defect** item. 
   - The New Work Item icon is located on the toolbar at the top of the screen.
   - Click the down arrow of the New Work Item icon, and select Defect.
2. Enter the required details.
   - Summary: `My first defect`
   - Filed Against: **JKE Main Development/BRM**
3. Set **Estimate:** `3.5 days`
4. **Save** the work item.
   - Note how Team Concert changes the estimate display to reflect days and hours.

Contribute to an item discussion

1. Expand the Discussion field of the defect you just created.
   - The discussion is located at the bottom of the Overview tab of the work item.
   - Click the arrow next to the Discussion field label. 

2. Add a comment to the Discussion field.
   - Click **Add Comment**, and enter some text.
   - Click **Save**.
3. Click **Hide Comment Field** to collapse the comment editor field.
4. Collapse the defect edit window to normal size.

Cleanup

1. Close all work item tabs.
2. Click **Done** to tell the instructor you've completed the lab.

(Optional exercises continue on next page.)

Optional – Batch update

1. Run the query **Open assigned to me**.
   - All work items assigned to Marco display in the Work Items view.
2. Select the top four or five items in the results list.
   - Use **<Shift>-click** to select a range of work items.
3. Change the priority of all work items in the selected range.
   - Right click on a selected work item, in the **priority** column → Change Priority → Low
4. Change the severity of all work items in the selected range.
   - Right click on a selected work item, in the **severity** column → Change Severity → Major

Optional – Error messages for required fields

1. Create a new **Defect** item.
   - Click the down arrow of the New Work Item icon, and select Defect.
2. Set File Against: **JKE Main Development**.
3. Try to save the work item.
   - Click **Save**.
   - Find the error message displayed at the top of the Defect form.
4. Correct the errors by entering a Summary.
5. **Save** the work item.

Lab: Work Item States

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**

Create a new Defect

1. Create a new **Defect** work item.
2. Find the State field in the upper-right corner of the record.
   - Notice that the state is Uninitialized, or empty, prior to your first save.
3. Fill in values for the required fields, and save the work item.
   - Notice that the state is set to **New** after you save.

Work item state change

1. Click the State field dropdown arrow to see transitions available from the **New** state.
   - Available transitions: **Start Working**, **Resolve**
2. Select the **Start Working** action.
   - Notice that the State field reflects the transition you are about to take.
3. **Save** the work item, and note the new state.
   - The transition, **Start Working**, resulted in the **In Progress** state when the work item was saved.

Work item resolution

1. Notice that the resolution field is not yet active.
2. Prepare to resolve the work item.
   - Choose action **Resolve**, but do NOT save the work item.
   - Notice that the resolution field is now active.
3. Set resolution to **Works for Me**.
4. **Save** the work item.
   - Notice that the work item is now **Resolved**, and the resolution field is again inactive.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Work Item Links

Setup

1. Verify user and project.
   - User: **marco**   Project: **JKE Banking**
2. Create and save two new stories with summaries **STORY1** and **STORY2**.
   - Choose any category for Filed Against.
   - Remember to Save both work items.

Create a link manually

1. Display the **Links** tab of STORY1.
2. Add a **Related** link from STORY1 to STORY2.
   - Click the **Add** button on the right of the empty links form, and select **Add Related…**
   - Disable **My assignments only**.
   - Select **STORY2**, and click **OK**.
   - **Save** STORY1.
3. Open STORY2 from STORY1.
   - Double click the **Related** link to STORY2 that you just created.
   - Verify that STORY2 has a matching related link pointing back to STORY1.

Create a link with the extraction wizard

1. Add two lines of text in the Description field of STORY2.
   - **Save** STORY2.
2. Create a child task from the first sentence in the Description field.
   - Highlight the first line.
   - Right click on the selected text → **Extract Work Item…**
   - Select **Children**, and click **Next**.
   - Select **Task**, and click **Next**.
   - Check **Filed Against**, and click **Finish**.
   - Enter Summary: `TASK`
3. **Save** the new task.
4. Verify that the new task is linked to its parent story.
   - Display the Links tab of the new task.
5. Open STORY2 from the link in the task.

View the Quick Information section

1. Display the Overview tab on STORY2, and inspect the Quick Information section.
   - The links display in very concise notation.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Work Item Templates

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**

Create work items for template

1. Create a story, as follows.
   - Enter Summary: `Template 1 story`
   - Set Filed Against: JKE Main Development
   - **Save** the story.
2. Create a child task for the story, as follows:
   - Enter Summary: `Template 1 dev task`
   - Create a parent link to **Template 1 story**.
   - **Save** the task.
3. Create another child task for the story, as follows:
   - Create a task.
   - Enter Summary: `Template 1 code review task`
   - Create a parent link to **Template 1 story**.
   - **Save** the task.

Create a template

1. Run a query to find items you recently created.
   - Expand JKE Banking → Work Items → Shared Queries → Predefined
   - Run query: **Recently created by me**
2. Create a template from story, dev task, and code review task.
   - Select the three work items you just created.
   - Right click the selection → Create Work Item Template…
   - Enter Name: `Story and two child tasks`
   - Click **Next**.
   - Check both variable attributes.
   - Click **Finish**.

(Lab continues on next page.)

Use the template

1. Create work items from the template.
   - Click the new work item dropdown, and select **New Work Items From Template...**
   - Select **Story and two child tasks**.
   - Click **Next**, then **Finish**.
2. Inspect the automatic query results that display.
   - *The new story and linked tasks are displayed by the automatic query to help you find and open the new work items.*
3. Open the story, and verify that it has links to the tasks.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Work Item Tips

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**

Open work item from Navigate menu

1. Open task **Implement – Requests sent in form of email**.
   - Navigate menu → **Open Work Item**
   - In the field at the top of the panel, enter: `requests`
   - Double click **43: Implement – Requests sent in form of email**.
2. Close the task.

Use quick search

1. Find the Quick Search field at the lower-left corner of the workbench.
2. Search for the same task you opened above.
   - Enter: `req*`
   - Press <Enter>, or click the flashlight to the left of the field.
   - Double click **59: Requests sent in form of email**.
3. Close the task.

View work item history

1. Display the Team Artifacts view.
2. Expand the **Work Item History** folder, located at the bottom of the view.
   - The work items you recently opened are listed.

Duplicate a work item

1. Create a duplicate of work item **43: Implement – Requests sent in form of email**.
   - In the Work Item History View, find work item **43**.
   - Right click **43** → **Create Work Item Copy**
   - Select attributes you wish to duplicate to new work item.
   - Click **Finish**.

(Lab continues on next page.)

Subscribe users

1. Remove yourself, **Marco**, from the Subscribers list of the new work item.
   - Click the **Links** tab of the new work item.
   - In the Subscribers area, select **Marco**, and click **Remove**.
2. Add **Bob** as a subscriber.
   - Click **Add...**
   - Search for, and select, **Bob**.
   - Click **OK**.
3. **Save** the work item.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Optional – Screen shot tool

1. Add a screenshot to the attachments list.
   - Click **Add Screenshot**.
   - Drag and resize the picture frame to enclose any portion of the screen.
   - Click the camera icon. 
   - Select the work item at the top of the **Attach to** list.

Optional – Work item links in text fields

1. Create a link in the Discussion field to another work item of interest.
   - Open the Discussion Comment field.
   - Enter: `Work item 97 is critical to this effort.`
   - Notice the link that is created.
2. Search for a work item, and link to it.
   - On a new line in the comment, enter: `Look also at:`
   - Right click in the Discussion Comment field → **Insert Work Item Link**
   - In the query panel, enter `help` to search for work items containing the word *help*.
   - Select **work item 8**, and click **OK**.
3. Save the work item.

Optional – Name links in text fields

1. Start another comment in the Discussion field.
2. Enter: `Ask Bob to submit the request.`
3. Make Bob's name a link to his user information.
   - Change **Bob** to Bob's login ID: `@bob`
   - Hover over the link to see Bob's information popup.
4. Save the work item.

(Optional exercises continue on next page.)

Optional – Export query results

1. Export the Open Stories query results to a CSV file.
   - In the Team Artifacts view, expand **JKE Banking** → **Work Items** → **Shared Queries** → **Predefined**
   - Right click **Open Stories** → **Export Work Items...**
   - Format: **Spreadsheet (.csv)**
   - Destination: **C:\temp\Open Stories.csv**
   - Click **Finish**.
2. Open the exported csv file.
   - Open Windows Explorer, and navigate to **C:\temp**.
   - Open the file: **Open Stories.csv**
3. Export the Open Stories query results to an HTML file, and include the Severity column.
   - In the Team Artifacts view, expand **JKE Banking** → **Work Items** → **Shared Queries** → **Predefined**
   - Right click **Open Stories** → **Export Work Items...**
   - Format: **HTML File (.html)**
   - Destination: **C:\temp\Open Stories.html**
   - Click **Next**.
   - Click **Add Columns...**
   - Select the **Severity** column, and click **OK**.
   - Click **Finish**.
4. Open the exported html file.
   - Open Windows Explorer, and navigate to **C:\temp**.
   - Open the file: **Open Stories.html**

Lab: Plan Basics

Setup

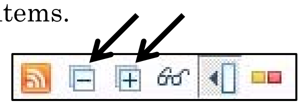
1. Verify user and project.
   - User: **marco** Project: **JKE Banking**

Open plan

1. Display the **BRM Sprint 2** plan in the **JKE Banking** project.
   - In the Team Artifacts view, expand JKE Banking → Plans → My Current Plans
   - Double click or right click → Open **BRM Sprint 2**
   - Select **Open plan in the Eclipse Client**.
   - Click **OK**.
2. Display the **Planned Items** tab.
   - Plan tabs are at the bottom of the plan window.
3. Expand the plan to full screen.
   - Double click the plan tab.

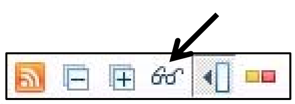
Basic controls

1. Collapse and expand all work items.
   - Click the **Collapse all** icon.
   - Click the **Expand all** icon.



2. Hide and show Sidebar.
   - Click the **Sidebar** icon.
   - Click the **Sidebar** icon again.

3. Display and hide Preview.
   - Click the **Preview** icon.
   - Click the **Preview** icon again.
   - Display the Sidebar, which was hidden when you displayed Preview.

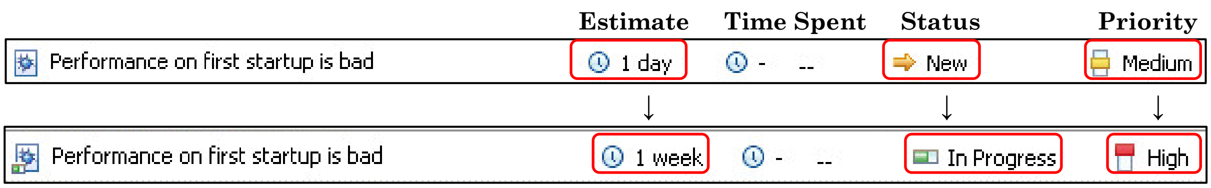


4. Set **View As** modes, and observe how the displayed information changes.
   - Note that **View As** is set to **Work Breakdown**.
   - Set **View As** to **Ranked List**.
   - Set **View As** back to **Work Breakdown**.

(Lab continues on next page.)

Direct attribute editing

1. Find the **Performance on first setup is bad** work item in Bob's area.
2. Click on each attribute of the work item to make the changes, as indicated below.
   - Use the **Start Working** action to change Status from **New** to **In Progress**.
   - You won't see the new state until you save the work item.



3. **Save** the plan to apply the action and view the new state.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Optional – Taskboard view

1. Switch to **Taskboard** view.
   - Turn on the sidebar, if you do not see the **View As** modes on the right side of the plan.

2. Complete a work item while in Taskboard mode.
   - Drag the first work item to the **Done** column.
   - **Save** the plan.

Lab: Plans and Work Items

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**
2. Display the **BRM Sprint 2** plan in the **JKE Banking** project.
   - In the Team Artifacts view, expand JKE Banking → Plans → My Current Plans
   - Open **BRM Sprint 2**.
3. Display the **Planned Items** tab of the plan, and maximize the Plan window.
4. Make sure **View As** is set to **Work Breakdown**.
5. Collapse all plan details, and expand Deb's work items.

Add a work item to the plan

1. Create a new work item for Deb.
   - Right click Deb's header section → Add Work Item → Task
   - Find the new task, and enter Summary: `Make active links blue`
   - **Save** the plan.

Parent/child links

1. In Deb's list, find and expand **Frequency of dividend transfer**.
   - The parent story is light grey, and the child task is black.
   - Deb owns the task.
2. In the Unassigned list, find and expand **Frequency of dividend transfer**.
   - The parent story is black, and the child task is light grey.
   - The Unassigned section owns the story.
3. Create a child work item.
   - In Deb's list, right click on the child task → Add Work Item → Task
   - Enter a summary, and **save** the plan.
   - The new work item is also a child of the same parent.
4. Create a work item from the parent.
   - In Deb's list, right click on **Improve link colors** → Add Work Item → Task
   - Enter summary: `New Task`
   - **Save** the plan.
   - This work item is not a child. Creating a work item from a parent creates another independent work item at the same level.
5. Demote a work item to make it a child.
   - Right click **New Task** → Demote
   - Notice that the work item is now a child.

(*Lab continues on next page.*)

Drag and drop actions

1. Reassign a work item.
   - Find **Some messages are not externalized** in Bob's list.
   - Click and drag the item onto Deb's header section.
   - Verify that the work item now appears in Deb's list.
2. Create a parent/child relationship.
   - Drag **Some messages are not externalized** on top of **Improve link colors**.
   - Verify that **Some messages are not externalized** is indented under its parent item.
3. Break a parent/child relationship.
   - Drag and drop **Some messages are not externalized** to the top of Deb's list, above all other work items.
   - You will see a faint line indicating its insertion point when you drop it.
   - Verify that it is no longer a child.
4. Save the plan.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Optional – Other context menu actions

1. Edit the summary of a work item in Deb's section.
   - Right click **Widget Disposed Exception** → Edit Summary
   - Modify the summary, and press **<Enter>**.
   - **Save** the plan.
2. Assign one of Deb's work items to new owner.
   - Expand the story **Allocate Dividends with Web Service**.
   - Verify the child task **Implement - Allocate Dividends with Web Service** is visible under the story.
   - Right click the child task → Assign to Owner → Bob
   - Verify that the work item now appears in Bob's list.
   - **Save** the plan.
3. Assign the item back to Deb.
4. **Save** the plan.

Lab: Backlog Plans

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**
2. Display your current plans in the **JKE Banking** project.
   - Expand JKE Banking → Plans → My Current Plans

Import work items to product backlog

1. Open the Eclipse view of the **Main Development Backlog Plan**.
   - Double click **Main Development Backlog Plan**.
   - Select **Open plan in the Eclipse client**.
   - When the plan opens, display the **Planned Items** tab.
2. Start the import wizard.
   - File → Import → Team → Work Items from CSV
   - Click **Next**.
3. Import a CSV file.
   - Browse and select: **C:\island\pub\rtc\Stories.csv**
   - Values are separated by: **Comma**
   - Click **Finish**, and then click **Yes** to import the work items.
   - Verify that two work items were imported to the backlog.
4. Create another story in the Main Development Backlog Plan.
   - Right click on an existing item → Add Work Item → Story
   - Enter Summary: `Wash Car`
   - **Save** the plan.
5. Set story points for all of the story work items.
   - For each story in the plan, click on the Story Points column, and select a value.
   - **Save** the plan.
6. Set priorities for the three work items.
   - For each work item, click on the Priority column, selecting a different value for each.
   - Notice that, while in **Ranked List** view mode, higher priorities move to the top of the list.
7. Change priorities of the work items to verify that the higher priorities move to the top of the list.
8. **Save** the plan.

(*Lab continues on next page*.)

Move items from product backlog to release backlog

1. Move **Plant garden** and **Sweep sidewalk** to Release 1.0.
   - Select **Plant garden** and **Sweep sidewalk**.
   - Right click the selection → **Plan For** → **Release 1.0**
2. **Save** the plan.
   - Note that the items no longer display in the Main Development Backlog Plan.
3. **Close** the Main Development Backlog Plan.

Display release backlog

1. Open the Eclipse view of **Release 1.0 Backlog Plan**.
   - Double click **Release 1.0 Backlog**.
   - Select **Open plan in the Eclipse client**.
   - Display the **Planned Items** tab.
2. Verify that the items you moved are visible in **Release 1.0 Backlog Plan**.

Break the epic into stories

1. Open the **Plant garden** epic.
   - Double click **Plant garden**.
2. Extract two stories as children of the epic, giving them summaries appropriate for a portion of the **Plant garden** effort.
   - Right click in either the Summary or Description text fields, and select **Extract Work Item...**
   - Be sure to copy the **Planned For** field, or set **Planned For = Release 1.0** before saving the child story.
3. Close all of the work items.
4. In the release backlog plan, expand the epic to verify that both child stories are visible.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Sprint Plans

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**
2. Display your current plans in the **JKE Banking** project.
   - Expand JKE Banking → Plans → My Current Plans

Move stories From Release 1.0 Backlog to Sprint 2

1. Open the Eclipse view of the Release 1.0 Backlog Plan.
   - Double click **Release 1.0 Backlog Plan**.
   - Select **Open plan in the Eclipse Client**.
   - Display the **Planned Items** tab.
2. Route **Donation by amount** to the EEM team.
   - Right click **Donation by amount** → **Change Filed Against** → **EEM**
3. Move **Donation by amount** to Sprint 2.
   - Right click **Donation by amount** → **Plan For** → **Sprint 2**
4. **Save** the plan.
5. **Close** the release backlog plan.

Work breakdown in the sprint backlog plan

1. Open **EEM Sprint 2 Plan**.
   - Select **Open plan in the Eclipse client**.
   - Display the **Planned Items** tab.
   - Expand **All** work items.
   - Find the story, **Donation by amount**, in the Unassigned section of the plan.
2. Create the first of two tasks used to break down the story.
   - Right click on either the **Unassigned** section or the **Donation by amount** story, and create a task.
   - Set Summary: `Retrieve donations`
   - **Save** the plan.
3. Make **Retrieve donations** a child of **Donation by amount**.
   - Drag **Retrieve donations** on top of **Donation by amount**.
4. Create the second of two tasks used to break down the story.
   - Right click on **Retrieve donations**, and create a task.
   - Set Summary: `Sort and print donation list`
   - **Save** the plan.
5. Set the time estimate of both tasks to **2 days**.

(Lab continues on next page.)

Assign work items, and complete some work

1. Assign the story and both tasks to **Marco**.
   - Select all three items and drag to Marco's section.
2. Complete **Sort and print Donation list**.
   - Set Time Spent: `2 days`
   - Use action **Complete**.
3. Update **Retrieve donations**.
   - Change Estimate to: `1 day`
   - Set Time Spent: `4 hours`
4. **Save** the plan.

End of sprint tasks

1. Create a task to account for **Retrieve donations** hours completed.
   - Set Summary: `Database logon completed for Retrieve donations`
   - Set Estimate: `4 hours`
   - Set Time Spent: `4 hours`
   - Make sure this is a child of **Donation by amount**.
   - Complete this task.
   - **Save** the plan.
2. Update **Retrieve donations** to reflect the hours remaining.
   - Change Summary: `Retrieve donation data and close database`
   - Set Estimate: `4 hours`
   - Set Time Spent: `0`
   - **Save** the plan.
3. Set **View As** mode to **Ranked List**.
   - All listed work items are unfinished.
4. Move unfinished work items to Sprint 3.
   - Select all remaining work items.
   - Right click the selection → **Plan For** → **Sprint 3**
5. **Save** the plan.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Schedules and Task Lists

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**

My Work view

1. Open the **My Work** view.
   - Click on the My Work tab. 

2. Expand the width of the view enough to accommodate the length of the work item summaries.

Triage Inbox

1. Accept all work items in the Inbox.
   - Click the accept all work link in the message at the top of the Inbox.

Work item order

1. Inspect the work items at the top of your schedule to see what items are scheduled first.
2. Drag **Calculation error** to the top of the list.
   - The remaining tasks move down.

Estimates and work time

1. Set **Calculation error** estimate to 1 week.
   - Click on the estimate in the My Work view, and select **1 week** from the dropdown list.
2. Set **Calculation error** estimate to 2 weeks.
   - Click on the estimate, and select **more** from the dropdown list.
3. Set time remaining for **Calculation error**.
   - Right click **Calculation error** → Show Work Time
   - Set Time Remaining **2 days**.
   - Right click **Calculation error** → Hide Work Time
4. Save changes made in My Work view.
   - Click the Save icon in the view tool bar. 
   - *If the save button is not active, then auto-save has already saved your changes.*
5. Play around with estimates, time spent, and work item positions to observe behavior.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: User Profile

Setup

1. Verify user and project.
   - User: **marco** Project: **JKE Banking**
2. Display your repository connection.
   - Display the Team Artifacts view.
   - Expand Repository Connections folder at the top of the view.

User profile editor

1. Open the user editor for Marco.
   - Right click marco@localhost → Open My User Editor

Work hours

1. Display the **Work Environment** tab.
2. Change Monday quitting time to 10:00 PM.
   - Double click **Monday**.
   - Set quitting time to **10:00 PM**, and click **OK**.

Add scheduled absence

1. Add a 1-day vacation for tomorrow.
   - Display the **Scheduled Absences** tab in your user editor.
   - Click **New…**
   - Enter Summary: `A much needed vacation`
   - Click the **First day** calendar icon, and select the next work day after today.
   - Click **OK**.
2. **Save** the changes to your user area.

Inspect email notifications

1. Click the **Mail Configuration** tab of the user editor.
2. Set all possible email notification settings.
   - Check **Based on my relationship to a given work item, email me…**
   - Click **Select All** near the bottom of the page.
3. Restore default email notification settings.
   - Click **Restore Defaults**.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

(Optional exercises continue on next page.)

Optional – Work assignments

1. View your current project work assignments.
   - Display the **Work Environment** tab in your user editor.
   - Click the **web client** link in the Work Assignments section.
2. Log in to the web client as: `marco` `marco`
3. Open the Work Environment tab.
4. Inspect the Work Allocations section to see where your time is allocated.
5. Close the web browser.

Lab: Logon

Logon to RRC web client

1. Start Rational Requirements Composer.
   - Find and double click the **Firefox** icon on your desktop.
   - Click the **RRC Web Client** bookmark button inside Firefox.
2. Log on.
   - User: `bob`
   - Password: `bob`
3. Open the JKE Banking project dashboard.
   - Click the **JKE Banking (Requirements Management)** link.

Cleanup

1. Click **Done** to tell the instructor you've completed the lab.

Lab: Dashboard and Project Pages

After completing this lab, you'll be able to:

- *View the user dashboard.*
- *Open a project page.*
- *Configure the layout of a project page.*

Setup

1. Log on to the RRC web client if not already open.
   - User: `bob`   Password: `bob`

Dashboard

1. Open the JKE Banking project dashboard if not already open.
   - From the All Projects page, click the **JKE Banking (Requirements Management)** link.
2. View the General tab of the dashboard.
   - Notice the default widgets on your dashboard that include Requirements Tracing, Reviews, Recent Changes, My Requirements Projects, and Comments.
3. View the Development tab of the dashboard.
   - Click the **Development** tab, and notice the default widgets.
4. Return to the **General** tab of your dashboard.

Hover pop-ups

1. View the hover pop-up for an artifact.
   - Hover your mouse over any artifact listed in the **Requirements Tracing Implemented By** widget.
   - A pop-up appears that shows you some of the information contained in the artifact without having to open it.

Project artifacts page

1. Open the JKE Banking Requirements project artifacts page.
   - In the **My Requirements Projects** widget, click the **Create or show artifacts** link next to **JKE Banking (Requirements)**.
2. Examine the page layout.
   - The Filter Bar appears on the left side of the Artifacts view, and the Information Sidebar appears on the right.

(Lab continues on next page.)

Configure layout

1. Collapse the Information Sidebar.
   - Hover your mouse over the bar separating the Artifacts view from the Information Sidebar. The bar will turn yellow.
   - Click the right facing-arrow in the Separation Bar.
   - The Information Sidebar should be hidden.
2. Expand the Information Sidebar.
   - Hover your mouse over the bar to the right of the Artifacts view.
   - Click on the left-facing arrow in the bar.
3. Resize the Information Sidebar.
   - Hover your mouse over the bar separating the Artifacts view from the Information Sidebar.
   - Click anywhere on the bar, except the left- or right-facing arrow, and move the bar.

Cleanup

1. Return to your dashboard.
   - Click the **Project Dashboard** menu link in the upper-left corner.
2. Click **Done** to tell the instructor you've completed the lab.

Lab: Filters and Tags

After completing this lab, you'll be able to:

- *Create and save filters, create and set tags, and create a permalink.*

Setup

1. Open the JKE Banking Requirements project page.
   - In the Dashboard, click the **Create or show artifacts** link next to JKE Banking.

Filter on a folder

1. Use a filter to show the artifacts contained in the Features folder in JKE Business Recovery Matters.
   - In the Filter Bar, expand the **Filter by Folder** section.
   - Expand JKE Banking (Requirements Management) → JKE Business Recovery Matters Project
   - Click on the **Features** folder.
   - The artifacts contained in the Features folder display in the Artifacts View.
2. Use a filter to show the artifacts contained in the Glossary folder.
   - Click on the **Glossary** folder.

Clear filter

1. Clear the filter that is selecting artifacts in a specific folder.
   - Click the Clear Filters button next to the Filter by Folder section heading.
   - Hint: If you hover your mouse over a button, a pop-up will indicate the purpose of the button.

Filter on an attribute

1. Use a filter to show the artifacts with the Artifact Type attribute set to Feature.
   - In the Filter Bar, expand the **Filter by Attribute** section.
   - Click on **Artifact Type**.
   - Select the checkbox next to **Feature** in the **Artifact Types is** dialog box.
   - Click **Apply**.
   - Note: All Feature artifacts are listed, regardless of the folder in which they exist.
2. Clear the Attribute filter.
   - Click the Clear Filters button next to the Filter by Attribute section heading.
3. Use a filter to show the artifacts with a Name that contains the word **donors**.
   - In the Filter by Attribute section, click on **Name**.
   - Type `donors` in the **Name contains** dialog box.
   - Click **Apply**.
4. Clear the Attribute filter.

(Lab continues on next page.)

Create new tag

1. Use a filter to view the artifacts in the JKE Business Recovery Matters Project → **Features** folder.
2. Open the feature **Organization must identify how much money is desired**.
3. Create a new tag named Island on this artifact.
   - Click the Select Tags button located above the Edit button.
   - In the Select Tags dialog box, click the **New Tag** link.
   - In the New Tag dialog box, type the Tag Name: `Island`
   - Click **OK**, and then click **OK** again to dismiss the dialog boxes.

Breadcrumb

1. Use the breadcrumb to navigate back to the Features folder filter.
   - The current breadcrumb should appear as follows:
JKE Banking (Requirements Management) > JKE Business Recovery Matters Project > Features
   - In the breadcrumb, click **Features**.

Set existing tag

1. Open the feature **Frequency of dividend transfer**.
2. Set the existing Island tag on this artifact.
   - Click the Select Tags button.
   - In the Select Tags dialog box, click on the **Island** tag.
   - Click OK.

Filter on a tag

1. Use the breadcrumb to return to **JKE Business Recovery Matters Project**.
2. Clear any existing filters.
3. Use a filter to show the artifacts with the Island tag.
   - In the Filter Bar, expand the **Filter by Tag** section.
   - Click on the **Island** tag.

Complex filter

1. Clear any existing filters.
2. Use filters to show the artifacts with High Priority in the Business Goals folder.
   - In the Filter Bar, expand the **Filter by Folder** section.
   - Expand JKE Banking (Requirements Management) → JKE Business Recovery Matters Project
   - Click on the **Business Goals** folder.
   - Expand the **Filter by Attribute** section.
   - Click **More attributes**
   - Select attribute: **Priority**
   - Select value: **High**
   - Click Apply.

(Lab continues on next page.)

Save filter as view

1. Save the filter you just created as a view.
   - In the Filter Bar, expand **Views**.
   - Click the Save View button.
   - In the New View dialog box, type the View Name: `High Priority Goals`
   - Click OK.

Cleanup

1. Return to your dashboard.
   - Click the Project Dashboard link in the menu toward the top of the window.
2. Click **Done** to tell the instructor you've completed the lab.

Optional – Show link

1. Open the JKE Banking Requirements project page.
2. In the Filter Bar, expand **Views**.
3. Create a hyperlink for the All Terms view.
   - Hover over the **All Terms** view.
   - Click the pencil dropdown when it appears, and select **Show Permalink**.
   - Note: This link can be copied from the Show link dialog box and sent to others for direct access to this view (as long as the user has permission).
4. Click **OK** to dismiss the Show Permalink dialog box.
5. Return to your dashboard.

Lab: Reports

After completing this lab, you'll be able to:

- *Create PDF or Word documents for an artifact.*
- *Generate reports.*

Setup

1. Open the JKE Banking Requirements project page.

Create document for an artifact

1. Expand Filter by Folder → JKE Banking (Requirements Management) → JKE Business Recovery Matters Project → Features
2. Open the **Frequency of dividend transfer** requirement.
3. Create a printable version of this requirement.
   - Click the Create and Print dropdown button.
   - Select **Create and Print PDF Document**.
   - In the Create PDF Document dialog box, select **Include Comments** and **Include Attributes**, and click **OK**.
   - In the Opening… dialog box, select **Open with Adobe Reader**, and click **OK**.
4. After examining, close the PDF document.

Generate a Requirements Specification Report

1. Expand Filter by Folder → JKE Banking (Requirements Management) → JKE Business Recovery Matters Project → Features
2. Select any three requirements by clicking the checkbox in front of the requirement.
3. Generate a Requirements Specification Report for these three requirements.
   - Click the pencil dropdown for one of your three selected requirements.
   - Select **Generate a Document-Style Report Document for 3 Artifacts**.
   - In the Select the Document-Style Report Type dialog box, select **Requirements Specification**, and click **Next**.
   - In the Select the Artifacts dialog box, click **Next**.
   - In the Report Information dialog box, type the Name: `My Requirements Specification`, and click **Next**.
   - In the Save Document-Style Report to Project dialog box, click **Next**.
   - In the Generate the Document-Style Report dialog box, click **Finish**.
   - Once the report is generated, leave the checkbox **checked** for Open the document-style report when the wizard is closed, and click **Close**.
4. Click **OK** to open the report.
5. After examining, close the PDF document.

(Lab continues on next page.)

Cleanup

1. Return to your dashboard.
2. Click **Done** to tell the instructor you've completed the lab.

Optional – Generate a report from a view

1. Open the JKE Banking Requirements project page.
2. Generate a Requirements Specification Report for artifacts contained in a view.
   - Expand the Views section in the Filter Bar.
   - Click the pencil dropdown next to the **High Priority Features** view.
   - Select **Generate a Document-Style Report**.
   - In the Select the Document-Style Report Type dialog box, select **Requirements Specification**, and click **Next**.
   - In the Select the Artifacts dialog box, click **Next**.
   - In the Report Information dialog box, type the Name: `High Priority Features`, and click **Next**.
   - In the Save Document-Style Report to Project dialog box, click **Next**.
   - In the Generate the Document-Style Report dialog box, click **Finish**.
   - Once the report has been generated, leave the checkbox **checked** for Open the document-style report when then wizard is closed, and click **Close**.
3. After examining, close the PDF document.
4. Return to your Requirements dashboard.

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