CHAPTER 5

Using ClearQuest – Technical Authority Role

> ✔ **NOTE**
> This chapter is specific to processing documentation CRs as a Technical Authority and does not apply to any other CR type (software or hardware).

The Technical Authority (TA) is responsible for performing work on an assigned Change Record (CR). While the CR is in the Assigned state, it is assumed that the TA will begin the required work.

Processing User Documentation CRs

The CR must be in the Assigned state before a TA can perform their work. After a TA has performed their work the CR transitions to the Performed state upon submitting the CR. For information on CR states, see "Change Record States" on page 1-7.

When a CR is in the Assigned state and assigned to you, an email notification is sent to you indicating that the CR is in your CRs_Waiting_on_me queries queue. The email also includes the CR ID, the state of the CR, the type of CR, the original SR ID, the predicted release, and a description of the work that needs to be performed.

> ✔ **NOTE**
> At this time, ClearQuest does not lock a CR when someone is already editing as in Applix. Additionally, ClearQuest times out if it sits idle for 180 minutes and the MetaFrame Log In page times out after 30 minutes.

To process documentation CRs that are in your queue:

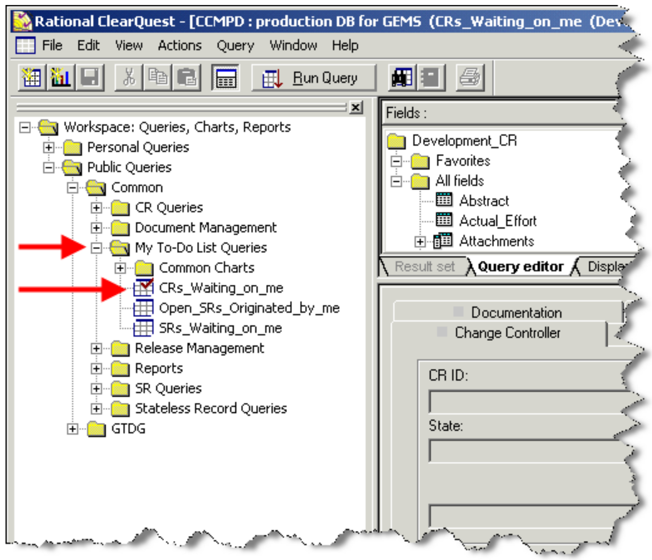
1. Log on to ClearQuest.

   For instructions on logging into ClearQuest, see "Accessing ClearQuest" on page 2-13.

2. In the ClearQuest Workspace (left pane), select **Public Queries**.

3. Select **Common**.

4. Select **My To-Do List Queries**.



For information on searching by CR ID, see “Searching for CRs by ID Number” on page 5-7.

5. Do one of the following:

   a. Double-click the **CRs_Waiting_on_me** query.

   OR

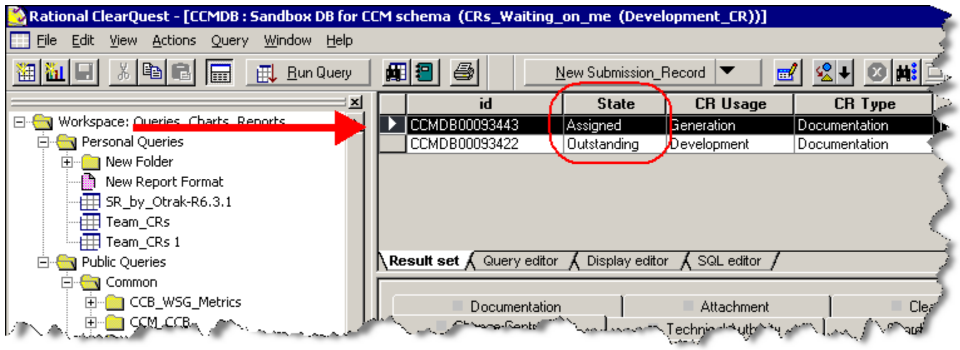
   b. Select the **CRs_Waiting_on_me** query and click the **Run Query** button on the toolbar.

NOTE

You can have the CRs_Waiting_on_me query run at startup. For information on how to run a query at start up, see “Running a Query at Startup” on page 7-10.

In addition, a query can be created to find a specific role or CR state.

A list of CRs display in the grid (Query Builder) above the CR form. For more information about the Query Builder, see “Query Window” on page 3-5.



6. Click the CR that is in an Assigned state to display it in the CR form.

   For more information on working a CR that is in the Outstanding state, see “Assigning User Documentation CRs” on page 4-1.

7. Click the **Actions** button.

8. Select **edit** from the menu.

9. Click the **Technical Authority** tab.

10. Select **Work In Progress** from the Status list box.

11. Click the **Apply** button.

NOTE
To discard your changes, click the Revert button.

12. Perform the work that is described on the Change Controller tab of the CR form.

    If you determine that the CR is a Works as Designed (WAD) or a Duplicate, you should reject the CR. For information on rejecting a CR, see “Rejecting a CR” on page 5-14.

    If you determine that the CR affects more than one document type, you should create additional CRs. For information on creating additional CRs, see “Creating Multiple CRs for Multiple Documents” on page 5-12.

NOTE
Currently, the documentation group for PCAD, MCAD, LRMS, Offendertrak, and NetRMS has the role of both Change Controller and Technical Authority and has the ability to modify the Change Controller field. However, the PCAD, MCAD, LRMS, and Offendertrak documentation group has a default Change Controller for filtering all documentation CRs.

13. After you are done performing the work, click the **Actions** button on the CR form.

14. Select **edit** from the menu.

> **NOTE**
> The Add_info option from the Actions drop-down menu only activates fields on the Notes tab and Attachments tab.

15. Click the **Technical Authority** tab.

16. Do one of the following:

    a. Open a saved version of the description of work template and paste it into the Resolution Description field.

    OR

    b. If your product team has a Description of Work template loaded, click the button to the right of the Resolution Description field to load the template.

17. Enter the description of work based on the defined template.

    - For information regarding the PCAD template, see "PCAD – Description of Work Template" on page A-1.
    - For information regarding the MCAD template, see "MCAD – Description of Work Template" on page B-1.
    - For information regarding the LRMS template, see "LRMS – Description of Work Template" on page C-1.
    - For information regarding the Offendertrak template, see "Offendertrak – Description of Work Template" on page D-1.

18. Select the information in the Resolution Description field and press **Ctrl+C**.

19. Click the **Documentation** tab.

20. In the Abstract field, press **Ctrl+V** to paste the Resolution Description from the Technical Authority tab.

21. In the remaining fields on the Documentation tab, enter the following:

    - Title – The document name.

      Example: PREMIER CAD User Guide.

    - Version Created – The document version.

      Example: 6.7.4

    - Author – Your name.

- Keywords – `User Documentation`
- Abstract – Paste the Resolution Description from the Technical Authority tab.

22. In the FA list box, select the document type that was changed.

NOTE
The options in the FA list box is different for each product.

PCAD documentation:

Config_Guide:PCAD	Configuration Guide
Install_Guide:PCAD	Installation Guide
Sys_Admin_Guide:PCAD	Administration Guide
Training_Guide:PCAD	Training Guide
Users_Guide:PCAD	Users Guide

MCAD documentation:

Config_Guide:MCAD	Configuration Guide
Install_Guide:MCAD	Installation Guide
System_Admin_Guide:MCAD	Administration Guide
Training_Guide:MCAD	Training Guide
Users_Guide:MCAD	User Guide

LRMS documentation:

Config_Guide:InfoCS	Configuration Guide
Install_Guide:InfoCS	Installation Guide
Online_Help:InfoCS	Online Help
Users_Guide:InfoCS	Users Guide

Offendertrak documentation:

Printed_Guides	Printed Guides
Online_Help:InfoCS	Online Help

NetRMS documentation:

Installation_Guide	Installation Guide

23. Click the **Technical Authority** tab.

24. Select **Peer Review** from the Status list box.

25. Click the **Apply** button to save your changes.

> **NOTE**
> To discard your changes, click the Revert button.

26. Send your document to be reviewed (FTR or desk review).

> **NOTE**
> All documentation CRs must be reviewed.

To enter the Review information and submit the CR:

1. After the changes have been reviewed and returned to you, open the CR.
2. Optional: If necessary, make any revisions and have the document reviewed again.
3. On the CR form, click the **Actions** button.
4. Select **submit_work** from the menu.
5. Click the **Technical Authority** tab.
6. In the Inspection ID field, enter the review information.

   For FTR reviews, use the following format: FTR <number> - CR <number> - <title of the FTR>.

   Example:
   `FTR 54213627 - CR 92569 - UF: Wrong error message when putting invalid unit of 9+ chars off duty CIL2`

   For Desk Reviews, use the following format: Desk reviewed by <name> on <date> - Time spent <#.#> hours - Disposition: <Accept as is, Accept with changes, Re-review Required>. If there were any unresolved issues add them to a New Note on the Notes tab.

   Example:
   `Desk reviewed by Mike Alt on 2/6/06 - Time spent 1.5 hours - Disposition: Accept as is.`

7. In the Actual Effort (in staff hours) field, enter the time spent working on this CR.

> **NOTE**
> The Actual Effort (in staff hours) field is not a required field. However, the PCAD, MCAD, and Offendertrak product teams require the TA to enter the time spent on the CR.

8. When you've completed the work and are ready to submit the CR to the Coordinator, click the **Apply** button.

   The state of the CR changes from Assigned to Performed.

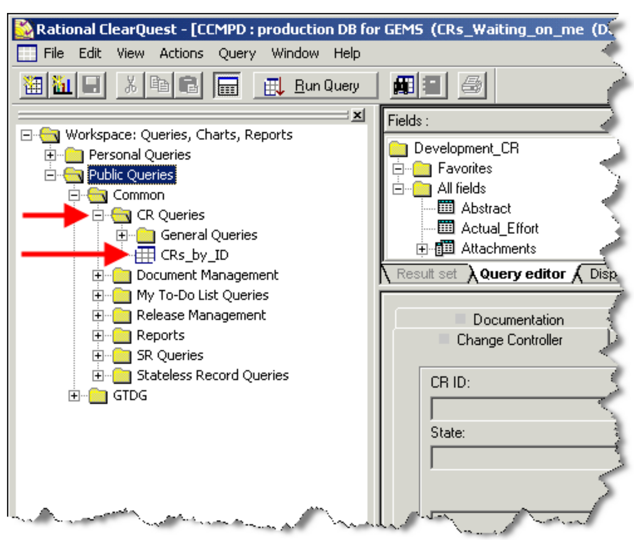
> **NOTE**
>
> PCAD, MCAD, LRMS and Offendertrak documentation CRs are submitted to the default documentation Coordinator prior to going to the Coordinator in Release Management. The purpose for having a default Coordinator within the documentation group is integrate all documentation changes into a documentation build (online help and PDF documents). After the online help and PDF documents have been built for a release, the CR is reassigned to the Coordinator in Release Management.

Searching for CRs by ID Number

You can search the ClearQuest database for a CR that is not assigned to you, or a CR that is in your queue.

To search for a specific CR:

1. In the ClearQuest Workspace, select **Public Queries**.
2. Select **Common**.
3. Select **CR Queries**.



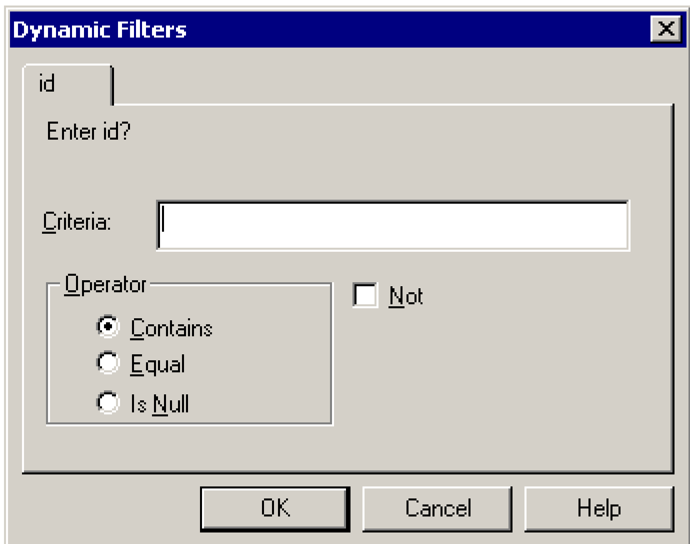
4. Do one of the following:

   a. Double-click the **CRs_by_ID** query.

      OR

   b. Select the **CRs_by_ID** query and click the **Run Query** button on the toolbar.

   The Dynamic Filters dialog appears.



5. In the Criteria field, enter the CR number (or any part of the CR number).

NOTE
The CR number is the last six digits of the CR ID. For example, the CR number for the following CR ID `CCMDB000928384` is `928384`.

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6. Confirm the Operator:

   - Contains – Returns the field with values selected (default setting)
   - Equal – Returns the field with the same values selected
   - Is Null – Returns the field with no values for that field
   - Not – Returns the field with opposite values selected

7. Click **OK**.

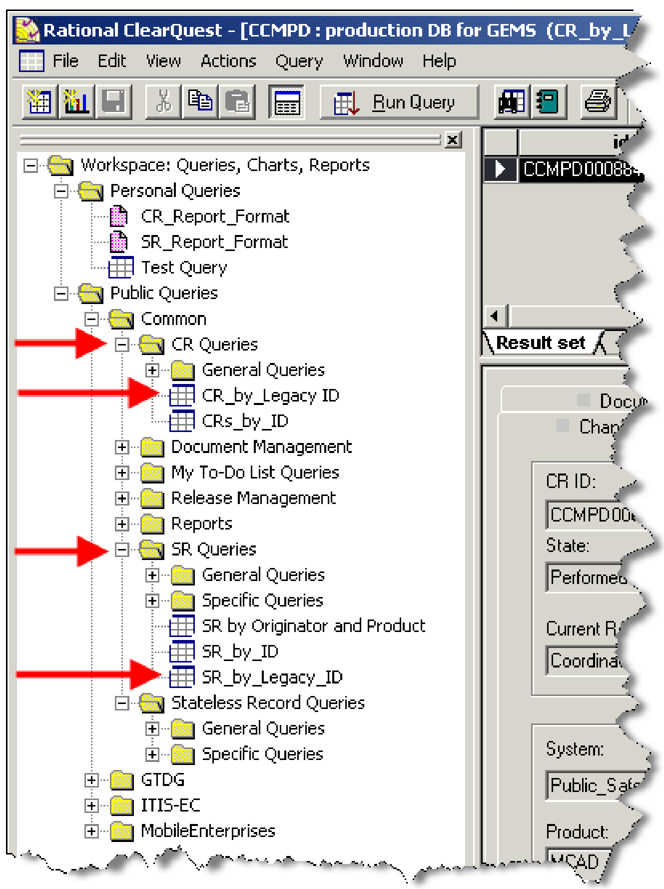
   The CRs display in a grid above the CR form.

Searching for CRs by Applix Number

The Applix number (Legacy ID) is listed on either the SR form.

To search for a CR using the Applix number:

1. In the ClearQuest Workspace, select **Public Queries**.
2. Select **Common**.
3. Select one of the following:
   a. CR Queries
   b. SR Queries



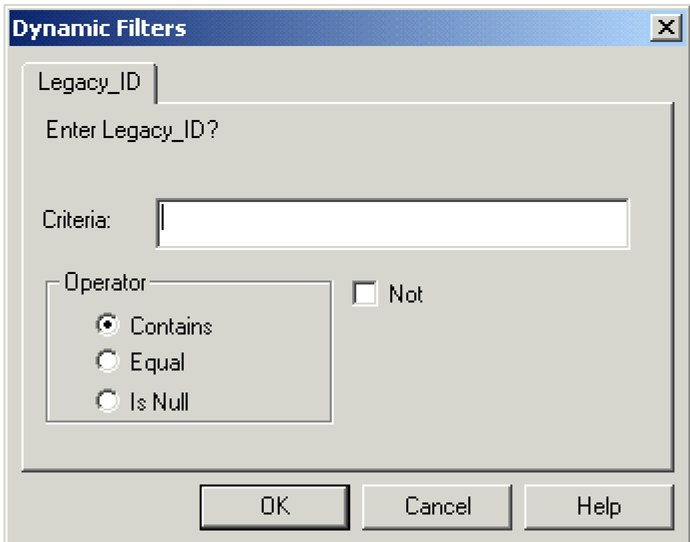
4. Do one of the following:

   a. Double-click the **CRs_by_Legacy_ID** or **SRs_by_Legacy_ID** query.

      OR

   b. Select the **CRs_by_Legacy_ID** or **SRs_by_Legacy_ID** query and click the **Run Query** button on the toolbar.

      The Dynamic Filters dialog box appears.



5. In the Criteria field, enter the Applix number.

6. Confirm the Operator:

   - Contains – Returns the field with values selected (default setting)
   - Equal – Returns the field with the same values selected
   - Is Null – Returns the field with no values for that field
   - Not – Returns the field with opposite values selected

7. Click **OK**.

   The form appears.

8. Click the **Related Records** tab.

   The CR numbers appear in the Child CRs list. You can double-click on the CR number to open it.

Unsubmitting CRs

After a CR is in the Performed state and submitted to the Coordinator, you can no longer edit the fields on the CR form. If changes need to be made to the information on the Documentation tab and/or the Technical Authority tab, a TA must unsubmit the CR before making any changes. After the changes have been made, the CR must be resubmitted to the Coordinator.

NOTE
A CR can only be unsubmitted if it has not yet been closed.

To unsubmit a CR and make changes:

1. On the CR form, click the **Actions** button.
2. Select **unsubmit_work** from the menu.

   The New Note field on the Notes tab changes to a required status.
3. Click the **Notes** tab.
4. In the New Note field, enter the reason why you are updating the CR and what needs to be updated.
5. Make the necessary changes to the CR.
6. Click the **Apply** button.

   The state of the CR changes from Performed to Assigned. After the changes have been made, the CR must be resubmitted.

   NOTE
   Unsubmitting a CR does not clear the Status field.

To resubmit a CR:

1. Click the **Actions** button.
2. Select **submit_work** from the menu.
3. Click the **Apply** button again.

   The CR state changes from Assigned to Performed.

Creating Multiple CRs for Multiple Documents

In the case where a single CR affects multiple documents, you must create a CR for each document type. For instance, if one CR is created and the TA determines that it affects more than just one document type (i.e., Configuration Guide, Training Guide, and/or User Guide), then the TA must create additional CRs for each document type affected.

NOTE
A CR is required for each document type for PCAD, MCAD, LRMS, and Offendertrak product teams.

To create multiple CRs for multiple documents:

1. On the CR form, click the **Related Records** tab.
2. Double-click the SR number in the Related SRs field.

   The SR form appears.
3. On the SR form, click the **Actions** button.
4. Select **create_cr** from the menu.

   The Assessor tab and Related Records tab changes to a required status.
5. Do one of the following:
   a. Click the **Related Records** tab.

      OR

   b. Click the **Assessor** tab.
6. In the Number of CRs to create field, enter the number of additional CRs that need to be created.
7. Click **OK**.

   An email notification is sent to you that contains the CR ID.

To access the newly created CRs:

NOTE
After the CR has been created, it needs to be assigned to you as the Technical Authority before work can be done.

1. Do one of the following:

   a. In the Workspace, double-click the **CRs_Waiting_on_me** query.

      OR

   b. Click the **Find Recent Submissions** icon (the binoculars) on the toolbar, select the type of record, and click **OK**.

   NOTE
   If no records were found, the following message will display: `There are no recently submitted records for the selected record type`

   The newly created CRs are listed in the Result set tab.

2. Click on a CR to open the CR form.

   The state of the new CR is Outstanding.

3. Click the **Actions** button.

4. Select **assign** from the menu.

   The CR Type, CR Usage, Technical Authority, and Due Date change to a required status on the Change Controller tab.

5. Click the **Change Controller** tab.

6. In the CR Type list box, select **Documentation**.

7. In the CR Usage list box, select **Development**.

8. In the Technical Authority list box, select your name.

   NOTE
   Once you've selected a Technical Authority from the drop-down list box, the Technical Authority field on the Technical Authority tab populates.

9. Click the ellipsis button to the right of the Due Date field and select a due date.

> **NOTE**
> If you don't know the due date, contact the Coordinator for assistance.

10. Click **OK**.

Rejecting a CR

In the case where a documentation CR is a Works as Designed or a Duplicate CR, the CR is rejected and not be included in the build.

A Works as Designed CR is when there is (or should be) clear and concise evidence that the problem described is working as required.

A Duplicate CR is when the resolution to another CR is identical and the fix satisfies all or part of the problem as described in both SRs. The CR cannot be closed without an SR/CR that caused the duplicate.

After the CR has been rejected, the state of the CR changes from Assigned to Rejected. At this point, the CR is reassigned to the Assessor, who closes the SR after reviewing the TA's notes.

To reject a Works as Designed CR:

1. On the CR form, click the **Actions** button.
2. Select **reject** from the menu.

   The Notes tab changes to a required status.
3. Click the **Notes** tab.
4. In the New Note field, enter the reason for rejecting the CR.
5. Optional: If you want to send the note to someone, enter the user name (first last) or their core ID in the Copy To Emails box.
6. Click the **Technical Authority** tab.
7. In the Inspection ID field, enter the Desk Review information in the following format:

   Desk reviewed by <name> on <date> - Disposition: Rejected

   Example:
   ```
   Desk reviewed by Mike Alt on 2/6/06 - Disposition:
   Rejected
   ```

8. Click the **Apply** button.

   The state of the CR changes from Assigned to Rejected.

To reject a Duplicate CR:

1. On the CR form, click the **Actions** button.

2. Select **reject** from the menu.

   The Notes tab changes to a required status.

3. Click the **Notes** tab.

4. In the New Note field, enter the reason in the following format:

   `Duplicate of SR######/CR######`

5. Optional: If you want to send the note to someone, enter the user name (first last) or their core ID in the Copy To Emails box.

6. Click the **Technical Authority** tab.

7. In the Inspection ID field, enter the Desk Review information in the following format:

   Desk reviewed by <name> on <date> - Disposition: Duplicate

   Example:
   ```
   Desk reviewed by Mike Alt on 2/6/06 - Disposition:
   Duplicate
   ```

8. Click the **Apply** button.

   The state of the CR changes from Assigned to Rejected.

Unrejecting a CR

After a CR is in the Rejected state, a TA can unreject a CR. For example, if a CR was rejected by mistake, then it can be unrejected. When the CR is unrejected, it is no longer assigned to a TA and is reassigned to the Change Controller.

To unreject a CR:

1. Search for the rejected CR and open it.

2. Click the **Actions** button.

3. Select **unreject** from the menu.

   The Notes tab changes to a required status.

4. Click the **Notes** tab.

5. In the New Note field, enter the reason for unrejecting the CR.

6. Click **Apply**.

   The state of the CR changes from Rejected to Outstanding.

NOTE
When rejecting a CR, the Desk Review information entered when rejecting the CR remains in the Inspection ID field until the TA either edits or submits the CR after a FTR or desk review.

Reassigning a CR to Different TA

To reassign a CR to a different TA, change the Technical Authority field on the Technical Authority tab.

To reassign a CR to another TA:

1. On the CR form, click the **Actions** button.

2. Select **edit** from the menu.

3. Click the **Technical Authority** tab.

4. Select a name from the Technical Authority list box.

5. Click the **Notes** tab.

6. In the New Note field, enter the reason why you are reassigning the CR to a different TA.

   NOTE
   The New Note field is not a required field. However, the PCAD, MCAD, LRMS and Offendertrak product teams require the reason why the CR is being reassigned.

7. Click the **Apply** button.

   The other TA receives an email indicating that the CR has been assigned to them and is in their queue.

Using the Notes Tab

The Notes tab should be used to copy any communication that you have with marketing, customer, or coordinators regarding the CR development. It should also include any additional notes on the development of the CR.

To add a new note:

1. On the CR form, click the **Actions** button.
2. Select **edit** from the menu.

   The New Note and Copy To Emails boxes changes to an editable status; however, these are not required fields.
3. Click the **Notes** tab and enter a New Note.
4. Optional: If you want to send the note to someone, enter the name of the user (first last) or their core ID in the Copy To Emails box.
5. Click the **Apply** button.

Opening Attachments

Attachments may be added to an SR to help facilitate the assessment, study, and work being performed on an SR or CR. An attachment can be any type of external file and is used to augment the SR description by adding screen shots, logs, or any other file that adds information to the SR. Files associated with the inquiry notes are also attached.

NOTE

The Description of Submission Record on the Originator tab is carried over to the CR, but the attachments remain part of the SR. Therefore, when the Description of Work on the CR refers to an attachment, open the SR to open the attachment.

To open an attachment:

1. On the SR form, click the **Attachments** tab.
2. Select the file from the list.

> **NOTE**
> You can change the view of the list by right clicking and selecting View from the menu.

3. Do one of the following:

   a. Double-click the file.

   OR

   b. Click the **Open** button.

Saving Attachments

Saving an attachment downloads the file to a specified location. The original file in the database remains unchanged.

To save an attachment:

1. On the SR form, click the **Attachments** tab.
2. Select the file you want to save.
3. Click the **Save As** button.

   The Save As dialog box appears.
4. Enter a name for the file.
5. Click **Save**.

Printing an SR or CR Record

In order to print a record, a report format must be associated.

To print a record:

1. On the SR or CR form, click the **Print Record** button.

   The report appears.

   NOTE

   If the error `You do not have a report format specified for this type of record to be used for printing. Do you want to do so now?` appears, you need to associate a report format. For information on associating a report format, see "Associating a Report Format" on page 5-19.

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2. Click the **Print** icon on the toolbar.

   Your default printer is used to print the record.

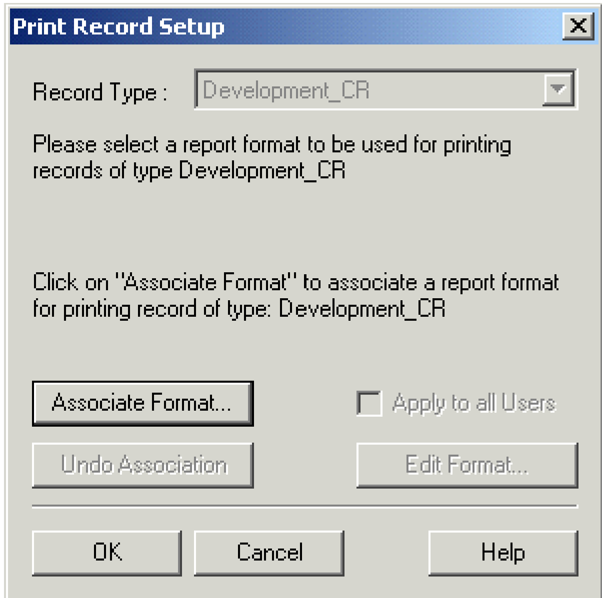
Associating a Report Format

Use Associating a report format to determine which pre-defined format will be used to print the report.

To associate a report format:

1. From the ClearQuest menu, select **File**.
2. Select **Print Record Setup**.

The Print Record Setup dialog box appears.

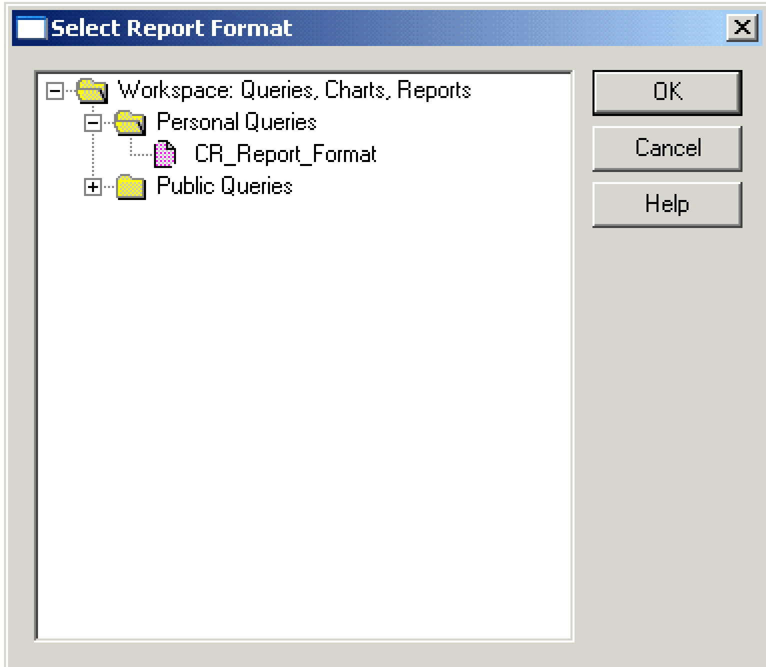


NOTE

The Undo Association button is used to unassociate a report format. For information on unassociating a report format, see “Unassociating a Report Format” on page 5-21. The Edit Format allows you to edit the format in Crystal Reports.

3. Click the **Associate Format** button.

The Select Report Format dialog appears.



4. Select a report format from the Workspace.

NOTE
If your product team has report formats pre-defined, select the appropriate report format for the record type.

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5. Click **OK**.

6. Click **OK** again to associate the report format.

Unassociating a Report Format

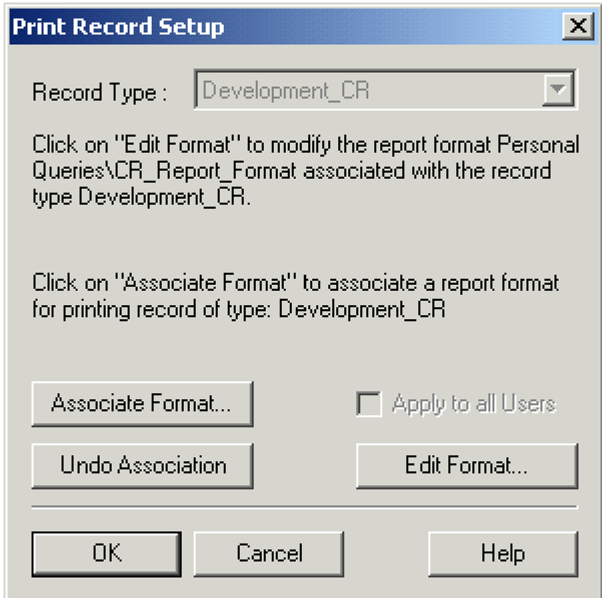
Use unassociating a report format to change the pre-defined format that used to print the report.

To unassociate a report format:

1. From the ClearQuest menu, select **File**.

2. Select **Print Record Setup**.

The Print Record Setup dialog box appears.



NOTE

The Association button is used to associate a report format. For information on associating a report format, see "Associating a Report Format" on page 5-19. The Edit Format allows you to edit the format in Crystal Reports.

3. Click the **Undo Associate** button.

   A warning message displays indicating the report format being unassociated.

4. Click **Yes**.

5. On the Print Record Setup dialog box, click the **Associate Format** button.

   The Select Report Format dialog box appears.

6. Select a report format from the Workspace.

NOTE

If your product team has report formats pre-defined, select the appropriate report format for the record type.

7. Click **OK**.

8. Click **OK** again to associate the report format.