

***Telelogic Dashboard  
CSV Walkthrough  
Release 3.6***

This edition applies to 3.6.0, Telelogic Dashboard and to all subsequent releases and modifications until otherwise indicated in new editions.

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## Welcome

Welcome to the CSV Walkthrough for Telelogic Dashboard!

Telelogic Dashboard brings software management best practices within reach of every organization and every manager. Manage requirements, schedule, budget, quality, configuration management and size in one place; keeping total control of the drivers that keep projects on time and within budget.

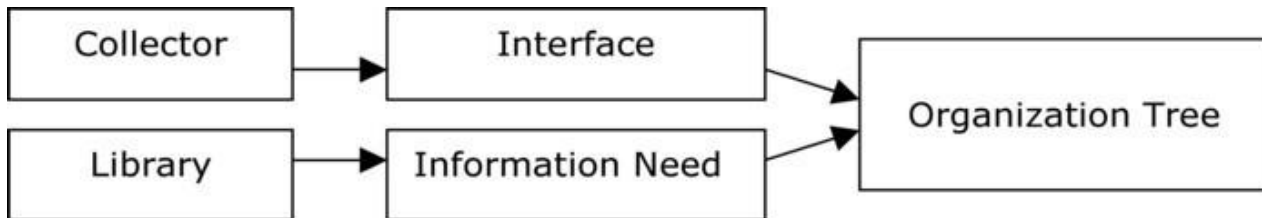
Telelogic Dashboard spans the gap between the management process desired and the one currently in place. Focus on managing by exception using Telelogic Dashboard alerts, analysis, graphical displays and drillable views that provide all the information needed to make well-informed decisions quickly. Using a web-based interface and intelligent integrations to software life cycle tools, Telelogic Dashboard delivers industry best practices ready to be applied. Finally, Telelogic Dashboard checks project compliance with industry standards and unit templates, ensuring a course to success.

# Data Collection Walkthroughs

## Data Collection Overview

Before beginning the integration to a data source, it is important to understand the key elements that allow the portal to gather and display data from your data.

Data in the Portal is gathered by the **Collector**, configured by the **Interfaces**, organized by **Information Needs** and analyzed in the **Organization Tree**.



The **Collector** (Windows based executable) - Gathers data from outside sources and stores it in the **Transform** database.

- **Outside Data Sources** include: Telelogic DOORS, Telelogic Synergy, Telelogic Change, Microsoft Project, Oracle Databases, Microsoft SQL Databases, Microsoft Access, Microsoft Excel, ODBC, CSV, and HP Quality Center.
- The **Transform** is a Microsoft SQL Database table located in the Dashboard\_Transform database. It stores current and historical data collected from **Outside Data Sources**.

**Interfaces** (From the Collection tab in the Portal) – Allow users to define and organize data collected by the **Collector**. **Interfaces** are defined using three subtabs: **General**, **Fields** and **Queries**.

- The **General** tab includes the type of data being retrieved from the **Outside Sources** as well as the name of the database that will be used to store the data.
- The **Fields** tab defines the field sets of data that are being retrieved as well as the table name where information will be stored in the **Transform**.
- The **Queries** tab indicates the SQL queries that will be run against the **Transform** to produce data points for **Graphs**.

**Information Needs** (From the Library tab in the Portal) – Allow users to define graphs to display the collected data.

- **Graphs** contain **Series** that are used to plot data against time/events.
- **Series** are associated with **Queries** defined in **Interfaces** to determine which data to plot.
- **Information Needs** can be used by one or more interfaces.

**Organization Tree** (From the Status tab in the Portal) – Allows users to display and analyze data in **Graphs** which are defined in **Information Needs**.

- **Folders** and **Units** provide structure for the **Organization Tree**.
- **Units** can contain one or more **Information Needs**.

## CSV Sample Walkthrough

This sample describes the steps to be performed in tool needed to configure and collect data from CSV files. This sample walks a new user through all required steps needed to see graphs with data points populated from CSV files.

There are four areas that will be covered through this walkthrough:

- Formatting a CSV File
- Portal Configuration
  - Create an Interface in the Portal
  - Examine/Configure an Information Need
  - Setup a Unit with Information Needs (or use a template)
  - Assigning Schedules to a Unit
- Collector Configuration
  - Configure the Collector
  - Run a Collection
  - Check/Resolve any collection errors/problems
- Unit Configuration
  - Check for collected items in the Portal and assign them to Units
  - Refresh the Unit
  - View collected data graphs in the Portal

## Formatting the CSV File

The Portal requires that a certain format be applied to the CSV file. This format is the basic format applied to CSV files, so most exported files will be compatible. The format requires that the first line of the file be the "column" headers, or the definition of what is in the file. For example, in the Schedule CSV file that will be used as an example throughout, the header line looks like the following:

```
ScheduleMilestone,Task_Start_Date,Task_Finish_Date,Task_Act_Start,Task_Act_Finish
```

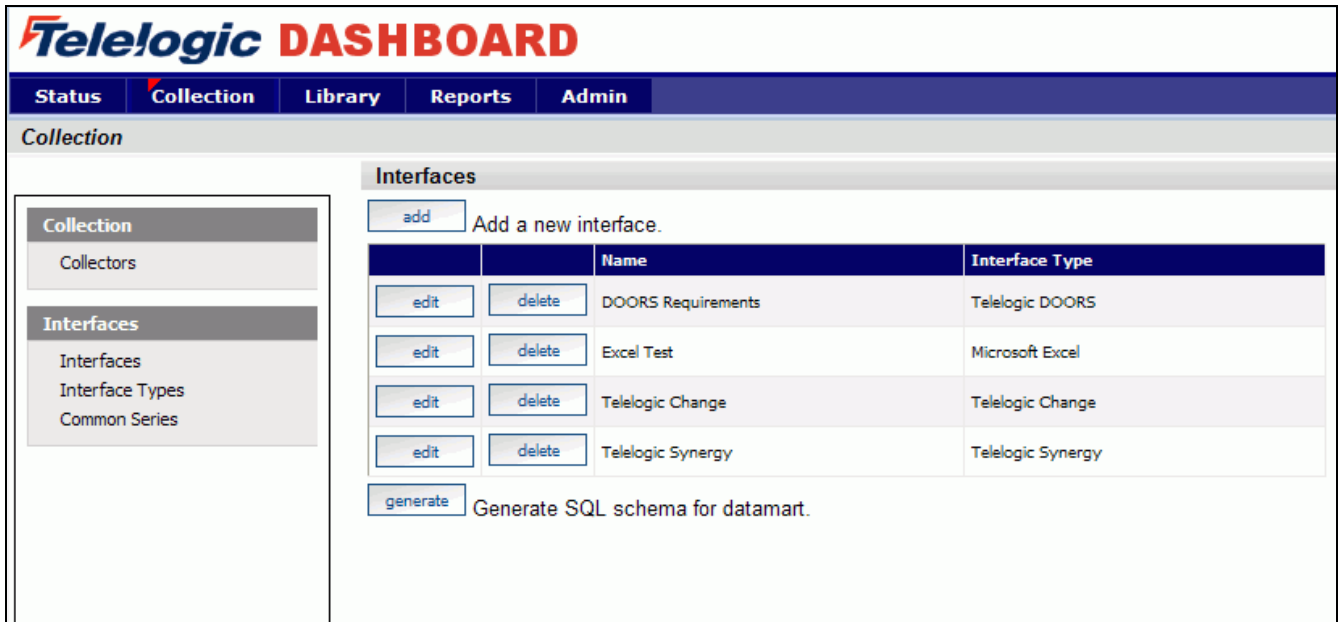
Notice that there are commas between each field, and no comma at the end. The header line should be on a line by itself. Each consecutive line should have data that lines up to the fields in the header, is separated by commas, has no comma at the end of the line, and be on a line by itself. This is the basic format that the Portal is expecting. Once your CSV file is set up correctly, you are ready to move on to configuring the Portal.

## Configuring the Portal

The Portal provides the user the ability to describe which data to collect, how to analyze it and then how to display it. Before information can be analyzed or displayed, the Portal must be configured to collect the information from a CSV file.

### Creating the Interface in the Portal

Upon opening the application, the Portal defaults to the Status page. The first step is to create a unique Interface for the CSV file. Select the **Collection** tab, and then click on the **Interfaces** option on the left hand side.



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes tabs for Status, Collection (selected), Library, Reports, and Admin. Below the navigation bar, the 'Collection' section is active. On the left, a sidebar menu shows 'Collection' and 'Interfaces' (selected). The main content area displays the 'Interfaces' list, which includes an 'add' button, a table of existing interfaces, and a 'generate' button.

		Name	Interface Type
<input type="button" value="edit"/>	<input type="button" value="delete"/>	DOORS Requirements	Telelogic DOORS
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Excel Test	Microsoft Excel
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Telelogic Change	Telelogic Change
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Telelogic Synergy	Telelogic Synergy

From the Interfaces List, click on the **add** button. This will create a new **Interface**. An Interface includes the type of information that will be collected from the data source (in this case, fields from a CSV file), where the information will be stored as well as the queries that can be executed against the data collected.

On the **general** subtab of the interface, enter a title for your interface. The title for this example is Schedule CSV. For CSV files, the Description and Type Identifier are optional fields which will not affect the collection. Select the Database where the collected data will be stored. This is normally the Transform Database.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

**Edit Interface** *Collection -> Edit Interface (New Interface 3/6/2008 4-36-36 PM)*

general fields queries

Name: Schedule CSV (17)

Interface Type: CSV

Description:

Type Identifier:

Database: Transform Database

Copy: Copy field sets and queries from the interface selected below into this one. Note: All field sets and queries in this interface will be deleted. no selection

[Copy Field Sets and Queries](#)

save cancel

Add (new) table fields during save?

Update or delete table fields during save?

The next step is to set up the fields in the Interface.



## Setting Up Fields

The Collector uses the information found in the **fields** subtab of the interface to determine what information to collect. Select the **fields** subtab. Notice that it is possible to have multiple **sets** of data collected from this tab. This is mainly used for database type sources that collect information from multiple tables and will not be used with CSV files. The Default set should be used, but can be renamed if desired by changing the Title.

The screenshot shows the 'Telelogic DASHBOARD' interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The main content area is titled 'Edit Interface' and 'Collection -> Edit Interface (Schedule CSV)'. There are three tabs: 'general', 'fields', and 'queries'. The 'fields' tab is active.

**List of Sets:** A dropdown menu shows 'ScheduleCSV'. Below it is an 'add' button. The 'Title' field contains 'ScheduleCSV' and the 'Database Table' field also contains 'ScheduleCSV'. There is a 'Parameter Replacement Tag' field with an expand/collapse icon and 'apply' and 'delete' buttons.

**Fields in Selected Set:** An 'add' button is at the top. Below it, a list contains one item: 'task\_act\_finish - TaskActFinish (date)'. The item is highlighted in blue.

**Selected Field Properties:** A checkbox 'Do not collect from source?' is unchecked. The 'Source Attribute' field contains 'task\_act\_finish'. Below it is a warning: 'Changes below modify the associated database table. Changes of: 1) string type to non-string; 2) string to shorter string; or 3) allow null to not allow null; will result in the field being dropped and re-added causing loss of data.' The 'Table Field' field contains 'TaskActFinish'. The 'Type' dropdown is set to 'Date'. The 'Value' section has two radio buttons: 'Allow null - default optional' (selected) and 'Don't allow null - default required'. There is a 'default value' field. 'apply' and 'delete' buttons are at the bottom.

At the bottom of the interface, there are 'save' and 'cancel' buttons, and two checked checkboxes: 'Add (new) table fields during save?' and 'Update or delete table fields during save?'.

On the left side of this page, enter the name of the database table where the data will be stored. For this example, we will use "ScheduleCSV". The Parameter Replacement Tag field is also mainly used for database type sources and will not be used for CSV files. To save any changes to the Title or Database Table fields select the Apply button under the Parameter Replacement Tag field.

On the right hand side, you will input a list of columns from the CSV file to be collected by Dashboard. For CSV files, each column heading should be added as a field. When you add a field, you are asked for a few pieces of information. The first is the Source Attribute. This value is what the column name is in the CSV file. For this example, we'll use the last column in our file, which is named task\_act\_finish. Below the Source Attribute, you see the Table Field. This is what the column in the database will be named; in this case we'll use TaskActFinish, though it can be the same as the Source Attribute. The only requirement for the Table Field is that it be unique for this table and that it follows SQL Server naming convention which means no spaces in the word.

The next item to fill in is the Type of field that you're collecting. This will be used in creating the schema for the database. Make sure that the type that you choose here is equivalent to the Source type. For example, since the task\_act\_finish is a date, you would choose either DateTime or Date as the Type. Finally, the Value area lets you determine how to handle null values. You can choose to

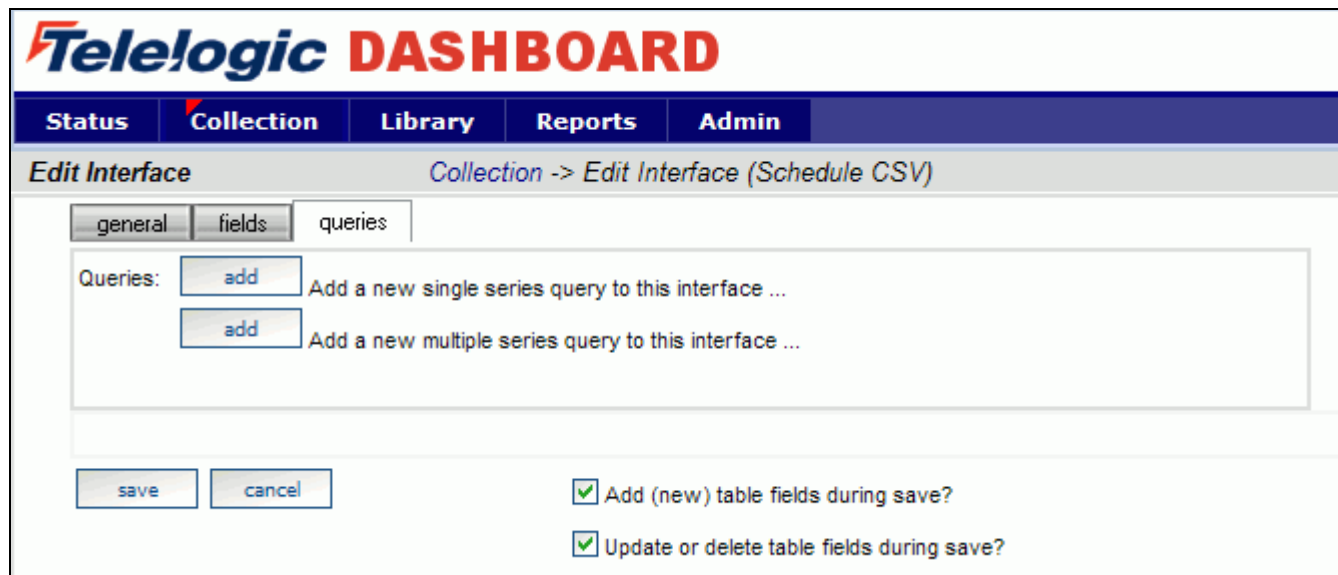
allow the field to have nulls (blanks) as acceptable values or disallowing nulls. If you choose to not allow nulls you are required to input a default value that is the same type of value as you choose for the Type. For example, if we wanted to not allow task\_act\_finish to be null, you could use "3/18/2007" for the default value, but not "today". Once you've completed setting up your field, click the save button below the field to save any changes.

Once you've created your field, you cannot make any changes to the field except to change the Source Attribute value (if you incorrectly entered it), or the value changes. Once you've finished adding all of the Fields from the CSV, you're ready to move on to writing queries for your data.

## Defining Data Queries

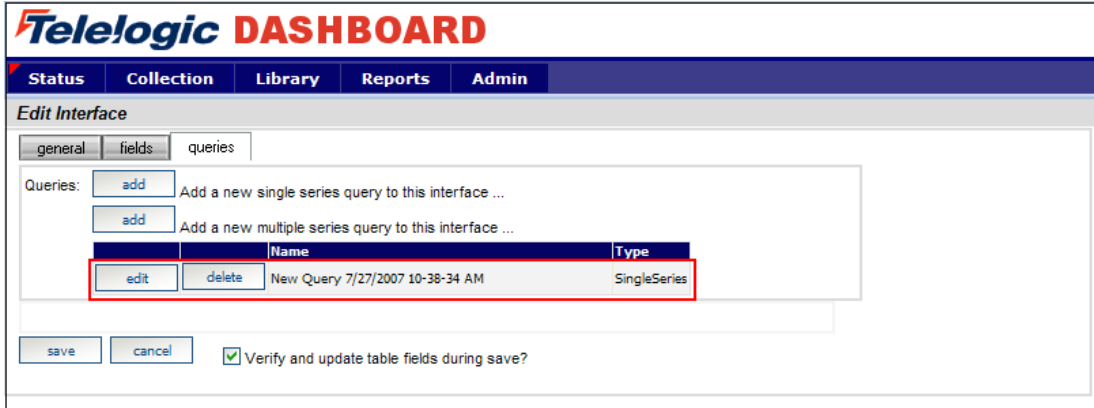
The final tab of the Interface is the **queries** subtab. The queries tab is used to define how data is counted or treated to show the information that is desired. This is done through SQL queries, with the help of a handy **Query Builder**. Most of the queries can be built with little or no knowledge of SQL, though cursory knowledge would definitely be helpful for troubleshooting.

The first step is to create a Query. You have a choice of two types of queries: **single series** and **multiple series**. A single series query returns a single value for one series in a graph and is the more common query to use. Multiple series queries are used when you're either not sure of what data you're going to be collecting, or you'll be running the same basic query with a single difference. For example, if you wanted a graph that would display Defects by Priority, but you weren't sure how many different priorities were being used, you could use the multiple series to first retrieve the different priorities, use those to create series for a graph and then count the number of defects for each priority. Or if you knew the priorities, but there were a good number of them you could use the multiple series query for the same use.



In this example we'll create a single series query. Click the **add** button for the single series query.

Notice the new query created below.



Click on the **edit** button for the query.

Enter a name in the **Title** field that will be meaningful when it is used at a later time. Notice that below the title of this query, there is a drop down list of **Common Series**. The Common Series is used to link an interface and a series on a graph. Select the one that is close to the query that you are running or create a new one.

For this example, we are going to add a query for Total Tasks. For the Common Series, we'll use the "SL – Total Tasks" which is a query that is used with the default Schedule Loading Information Need. For this query, the information that we want to get is a count per period of all of the tasks in the file, but only for this one file. To get this, select the radio button for **a count of**, and click both the check boxes for **the current item** (which restricts the data collection to just this one file) and **for the current period** (which restricts the data collection to the data collected for the specific time period). Most of the time, you will want to use the check boxes for both the current item and the current period.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

Edit Query Collection -> Edit Interface (Schedule CSV) -> Edit Query

Title: Total Tasks

Common Series: SL - Total Tasks

Query Builder Query Edit Test Query

1 Data from: ScheduleCSV database table

2 Result is:  a count of  a sum of TaskActFinish (ScheduleCSV)

3 Filters are:  the current item  for the current period

4 With terms: delete

Add new query term:

TaskActFinish (ScheduleCSV) = add Start Date insert

save cancel

Once you've selected those parameters, this specific query is completed. For other queries you may wish to add various other terms using the information from other columns or dates. (For more information on setting up queries in the Portal, check the help files.)

## Examining and Configuring an Information Need

On the **Library** tab, select the **Information Need List** option. This will open the list of Information Needs that are currently available for use. When you are adding a new interface, you have the option of creating a new Information Need, or using a pre-existing one. For this example, we'll create a new one, though we could use an existing Information Need.

### Adding an Information Need

From here, click on the **add** button above the list. On the **general** subtab, name your information need and choose a state for the Information Need that you are creating.

The screenshot shows the 'Telelogic DASHBOARD' interface. The top navigation bar includes 'Status', 'Collection', 'Library' (selected), 'Reports', and 'Admin', with a 'Help' link on the right. Below the navigation bar, the page title is 'Information Need' and the breadcrumb is 'Library -> Information Need (Default Schedule Information)'. The form has five subtabs: 'general' (selected), 'reference', 'guidance', 'graphs', and 'dimensions'. The 'general' subtab contains the following fields:

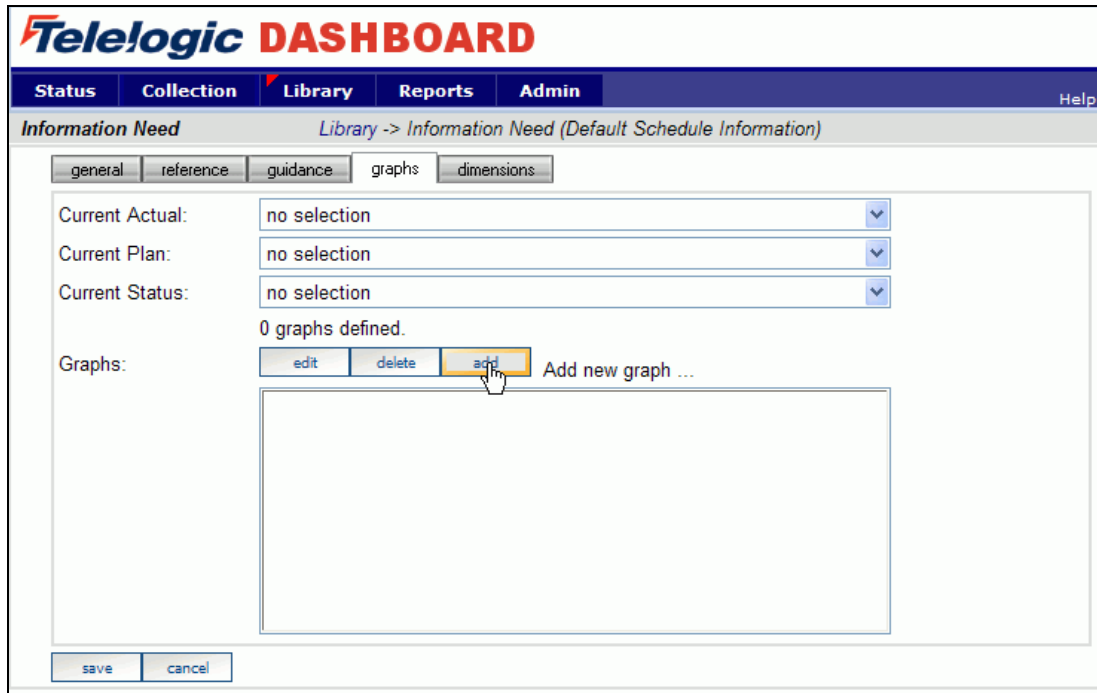
- Title:** A text input field containing 'Default Schedule Information' with a character count '(77)' on the right.
- State:** Radio buttons for 'draft', 'defined' (selected), 'active', and 'retired'.
- May be exported to other sites?
- Keywords:** A large text area with up and down arrows on the right side.
- Description:** A large text area with up and down arrows on the right side.

At the bottom of the form, there is a status line: 'Created on 3/28/2008 Created by Updated on: 3/28/2008'. Below this are 'save' and 'cancel' buttons.

All other information on the general subtab is optional. Additionally, the information on the **reference** and **guidance** tabs are for use within your company, generally able to convey information about an internal metrics plan, or utilizing best practices that have been collected when you're reviewing and creating a metrics plan. Save the Information Need and then reopen it. This is done so that no data is lost when you create a graph.

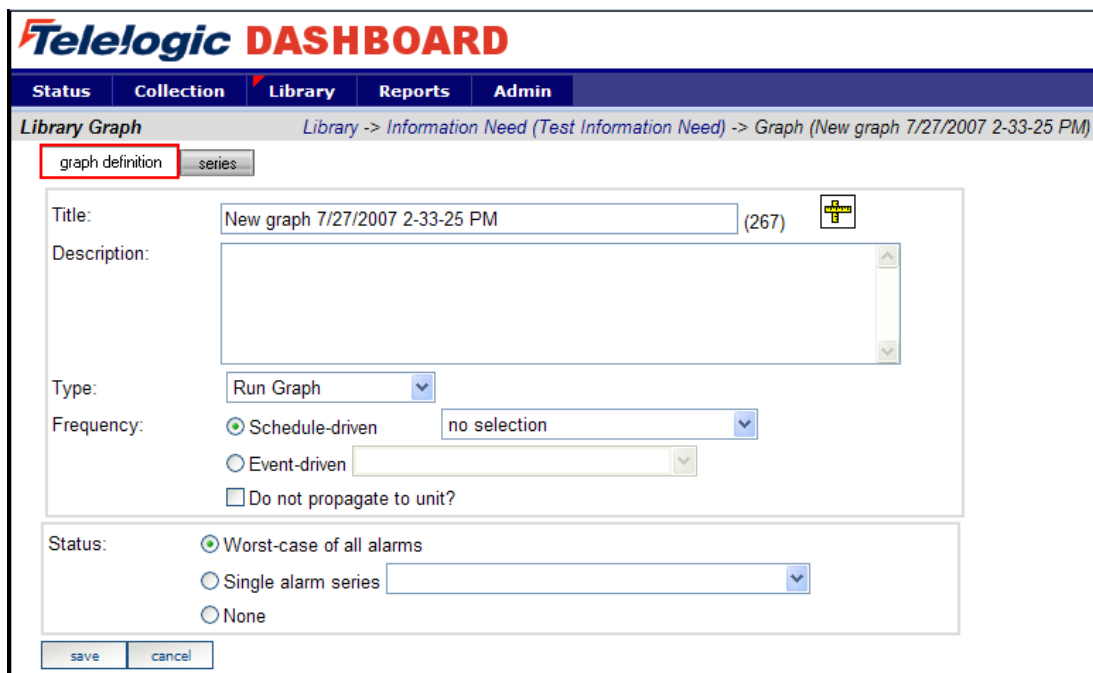
## Adding a Graph to the Information Need

Within the Information Need, you have the ability to add graphs that are all related to the information area associated with an Information Need. One or more graph can be added. The drop down fields on the graph subtab will be addressed later. To create the graph, select the add button on the **graphs** subtab.



The screenshot shows the 'Telelogic DASHBOARD' interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The current page is 'Information Need' with a breadcrumb 'Library -> Information Need (Default Schedule Information)'. The 'graphs' subtab is selected, showing options for 'general', 'reference', 'guidance', 'graphs', and 'dimensions'. Below the subtabs, there are three dropdown menus for 'Current Actual', 'Current Plan', and 'Current Status', all set to 'no selection'. A message states '0 graphs defined.' Below this, there are 'edit', 'delete', and 'add' buttons. A mouse cursor is clicking the 'add' button, which is highlighted in yellow. To the right of the buttons is the text 'Add new graph ...'. At the bottom of the form are 'save' and 'cancel' buttons.

Selecting the **add** button, opens the Library Graph window for the new graph. The Library graph window defaults to the **graph definition** subtab.



The screenshot shows the 'Telelogic DASHBOARD' interface for the 'Library Graph' window. The top navigation bar is the same as the previous screenshot. The current page is 'Library Graph' with a breadcrumb 'Library -> Information Need (Test Information Need) -> Graph (New graph 7/27/2007 2-33-25 PM)'. The 'graph definition' subtab is selected and highlighted with a red box. Below the subtabs, there are fields for 'Title' (set to 'New graph 7/27/2007 2-33-25 PM' with a character count of 267 and a plus icon) and 'Description' (a large text area). The 'Type' dropdown is set to 'Run Graph'. The 'Frequency' section has radio buttons for 'Schedule-driven' (selected), 'Event-driven', and 'Do not propagate to unit?'. There is also a dropdown menu for 'Frequency' set to 'no selection'. The 'Status' section has radio buttons for 'Worst-case of all alarms' (selected), 'Single alarm series', and 'None'. At the bottom are 'save' and 'cancel' buttons.

On the **graph definition** subtab, all of the basic information about the graph is set. Enter a name for the graph in the **Title** field. The **description** field may be left blank or filled in as desired. The **Type** of graph is chosen from a drop down list. We will be using a run graph for this example. (For more information on graph types, see the help files.)

The screenshot shows the 'Library Graph' configuration page in the Telelogic DASHBOARD. The breadcrumb trail is 'Library -> Information Need (Default Schedule Information) -> Graph (New graph 3/6/2008 4-48-25 PM)'. The page has two tabs: 'graph' (selected) and 'series'. The configuration fields are as follows:

- Title:** Total Tasks (305)
- Description:** (Empty text area)
- Type:** Run Graph
- Frequency:** Schedule-driven (selected), no selection
- Do not propagate to unit?:** (Unchecked checkbox)
- Status:** Worst-case of all alarms (selected), Single alarm series, None

Buttons for 'save' and 'cancel' are located at the bottom left.

Next, a **frequency** needs to be chosen. There are two options available for this field: schedule-driven or event-driven. An **event-driven** graph does not have a pre-defined and consistent schedule. Examples of event-driven frequencies may include software releases or peer reviews. **Schedule-driven** graphs are based on a static and consistent schedule, such as a daily, weekly, or monthly data collection. The selected graph schedule is used to populate the information on the x-axis of the graph. If no schedule is selected, the graph will default to the same schedule as the item to which it is assigned. This is the option that will be used for this example.

Finally, there is the **Status** option. A change to this option would be necessary for one of two reasons: more than one alarm on the graph or to inhibit the status from this particular graph affecting the status of the Information Need as a whole. For this example, the status will be left at the default selection, worst-case of all alarms.

To add a series to the graph, select the **series** subtab. This is where the information that will be displayed on the graph is going to be displayed. The example graph will be very basic and will include three series: Actual, Plan, and Alarm.

To create the Actual series, click on the **add** button. Enter the name of the series in the **Title** field. This series is a Data Type series, and is an actual duration, meaning that it should only show data from a given date, backwards. It is a normal series, and for the source we want to use the single series query that we'd created before in the Interface. Remember that this drop down is of the list of Common Series, so we will want to look for and choose the Common Series that we used before ("SL - Total Tasks") from the drop down. Also make sure that the Single Series query radio button is selected. Save the series.

**Telelogic DASHBOARD**

Status Collection **Library** Reports Admin Help

Library Graph Library -> Information Need (Default Schedule Information) -> Graph (Total Tasks)

graph series

add delete

Actual Tasks (actual data)

Title: Actual Tasks

Type:  Alarm  Data  Region

Duration:  Actual  Plan  Forecast

Use:  Normal  Primary X/Status Value  Primary Y

Is hidden? Order: 1

Source:  manual  single series query SL - Total Tasks +  multi-series query CM - Avg Task Dur by Pri +  equation [edit equation](#)

Sample Data: no selection

save

save cancel



Create a second series and call it "Planned Tasks". Again this series is a Data Type series, but this series is going to use the Plan duration, which means that it can have data for both before and after the current date. This series is also normal, and we will leave it as a manual entry series. Click the **save** button to save the series.

The screenshot shows the 'Library Graph' configuration interface in the Telelogic DASHBOARD. The breadcrumb path is 'Library -> Information Need (Default Schedule Information) -> Graph (Total Tasks)'. The 'series' tab is active, showing a list of series on the left: 'Actual Tasks (actual data)' and 'Planned Tasks (plan data)'. The configuration for 'Planned Tasks' is as follows:

- Title:** Planned Tasks
- Type:**  Alarm  Data  Region
- Duration:**  Actual  Plan  Forecast
- Use:**  Normal  Primary X/Status Value  Primary Y
- Is hidden?:**  **Order:** 1
- Source:**
  - manual
  - single series query: CM - 2 or more ancestors
  - multi-series query: CM - Avg Task Dur by Pri
  - equation
- Sample Data:** no selection

Buttons for 'add', 'delete', 'save', and 'cancel' are visible. An 'edit equation' link is present next to the equation source option.

Create a third series and call it "Total Tasks Alarm". This series is going to be an Alarm Type series. Select Actual for the Duration, and Normal for the Use.

For this series, the source is going to be an equation, so select the equation radio button. In the equation box, type `if((series("\Actual Tasks")>series("\Planned Tasks")),red,green)`. (**Do not copy** the query out of this document as Word documents change the quotation marks to an image character that is not accepted in the equation.) You can also use the **Equation Editor** to edit the equation for the alarm.

For the equation in this example, the alarm shows red if the total number of tasks is more than the planned number of tasks.

**Telelogic DASHBOARD**

Status Collection **Library** Reports Admin Help

Library Graph Library -> Information Need (Default Schedule Information) -> Graph (Total Tasks)

graph series

add delete

Actual Tasks (actual data)  
Planned Tasks (plan data)  
Total Tasks (actual data)

Title: Total Tasks

Type:  Alarm  Data  Region

Duration:  Actual  Plan  Forecast

Use:  Normal  Primary X/Status Value  Primary Y

Is hidden? Order: 1

Source:  manual

single series query CM - 2 or more ancestors +

multi-series query CM - Avg Task Dur by Pri +

equation [edit equation](#)

```
if((series("Actual Tasks")>series("Planned Tasks")),red,green)
```

Sample Data: no selection

save

save cancel

Once you've created all three series, save the graph.

The final step is to set the Information Need status drivers, which are the drop downs on the graphs tab. These three areas drive the status for the Status page displays. In this case, set the Actual Tasks series as the **Current Actual** value, Planned Tasks as the **Current Plan** value, and the Total Tasks Alarm as the **Current Status** value. Save the Information Need.

**Telelogic DASHBOARD**

Status Collection **Library** Reports Admin Help

Information Need Library -> Information Need (Default Schedule Information)

general reference guidance **graphs** dimensions

Current Actual: Total Tasks\Actual Tasks

Current Plan: Total Tasks\Planned Tasks

Current Status: Total Tasks\Total Tasks

1 graphs defined.

Graphs: edit delete add Add new graph ...

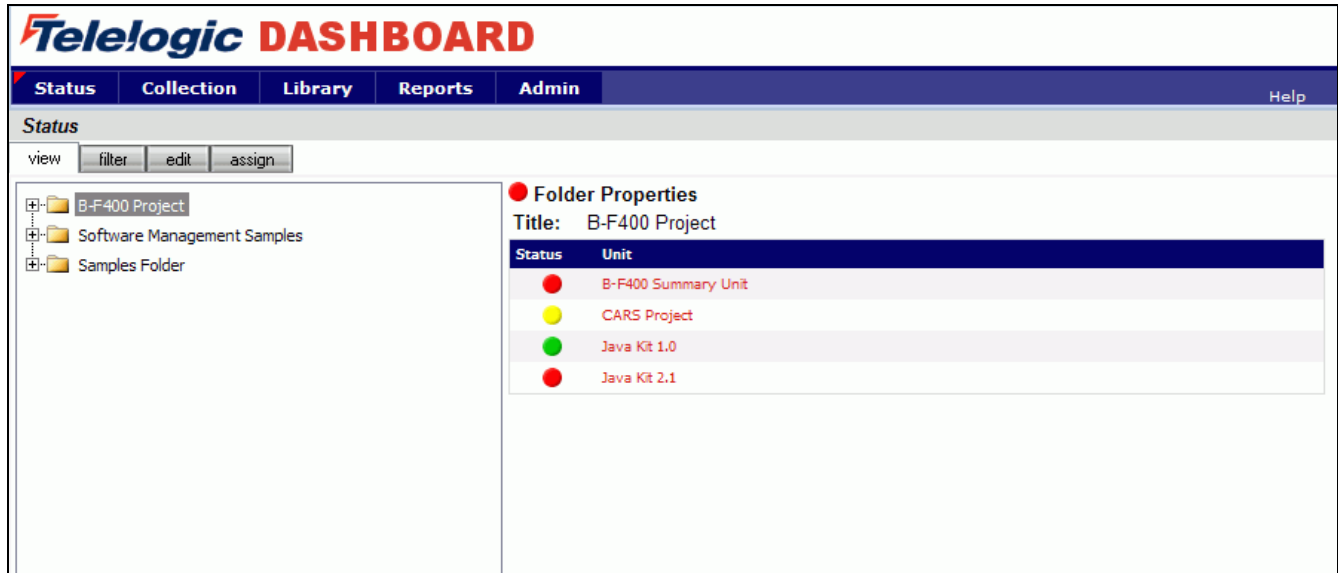
Total Tasks (Run)

save cancel

The next step is to setup a unit to display your data results.

## Setup a Unit

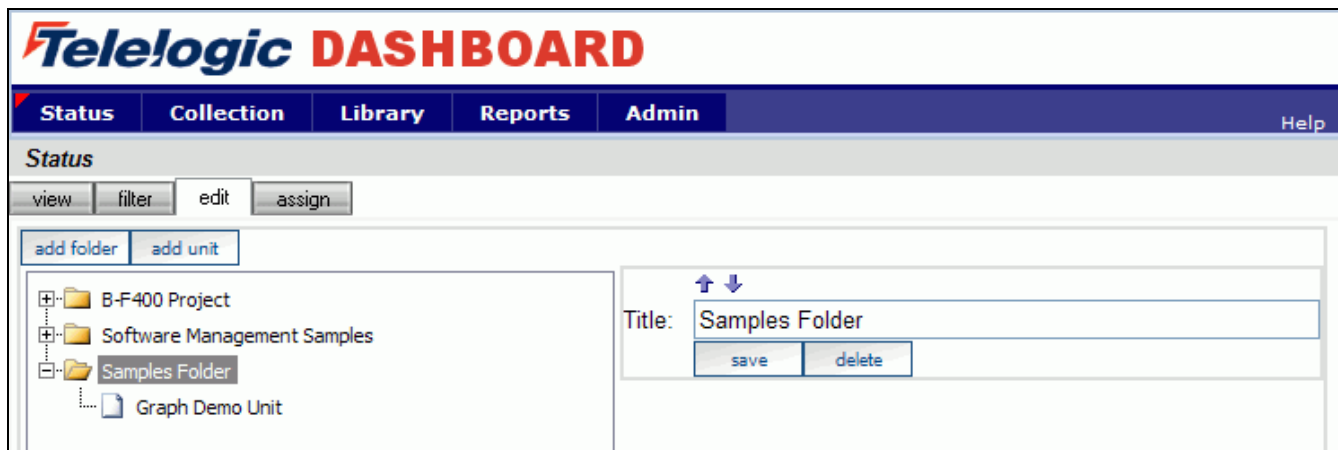
Once you've verified that everything is set up right for the collection, you can get the Status tab ready to show your data results. You do this by setting up a **Unit**.



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin', with a 'Help' link on the right. The 'Status' tab is active, displaying a 'view' button and sub-tabs for 'filter', 'edit', and 'assign'. On the left, a tree view shows folders: 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. On the right, the 'Folder Properties' section is open for the 'B-F400 Project', showing a table of units:

Status	Unit
●	B-F400 Summary Unit
●	CARS Project
●	Java Kit 1.0
●	Java Kit 2.1

Head back to the status tab. To add a unit, click on the **edit** subtab. This is where your data tree gets organized. Create a folder, or use an existing one, and then add a **unit**.



The screenshot shows the Telelogic DASHBOARD interface with the 'edit' sub-tab selected. The 'add folder' and 'add unit' buttons are visible. The tree view on the left now includes 'Graph Demo Unit' under the 'Samples Folder'. On the right, a form for adding a unit is displayed, with the 'Title' field set to 'Samples Folder' and 'save' and 'delete' buttons below it.

On the right hand side, you will see information about the Unit that you're adding.

Give the unit a **title**, and set an **owner** (this value can be changed later). You can leave the template set to no selection since no template has been setup for the new interface. A template automatically assigns Information Needs, and other information to your Unit and can be used to easily create homogenous units.

The screenshot shows the Telelogic DASHBOARD interface. At the top, there is a navigation bar with tabs for Status, Collection, Library, Reports, and Admin, and a Help link. Below the navigation bar, the 'Status' page is active. It features a toolbar with buttons for 'view', 'filter', 'edit', and 'assign'. Below the toolbar, there are buttons for 'add folder' and 'add unit'. A tree view on the left shows a folder structure: 'B-F400 Project', 'Software Management Samples', 'Samples Folder', and 'Graph Demo Unit'. The main area contains a form for creating a unit. The form fields are: Title: 'Schedule CSV Unit'; Owner: 'no selection'; Unit type: 'basic unit' (selected) and 'summary unit'; Template: 'no selection'; Dates: Start date: 'January 1 2008' and End date: 'December 31 2008'; and a checkbox for 'For demonstration only?' with a note: 'Note: Cannot be changed once created.' An 'add' button is at the bottom of the form.

At this point, you're ready to assign a schedule to the unit.

## Assign a Schedule to a Unit

The schedule assigned to a unit becomes the default schedule for any items assigned to the unit as well as the graphs associated with them. The unit schedule is used in the Gantt View to determine the time period shown. The unit schedule is also used to update the status of the unit.

To assign a schedule, select the **unit** on the Status page and click the **Details** button. This will open the Unit Status page with the Gantt graph displayed. Under the **Definition** section, select the **Unit Properties** option. The Unit Definition screen will open for the selected unit. Notice, the **Default Schedule** field is set to 'No Selection'. Select 'Basic Schedule Mode' as well as a schedule for the unit from the drop down list. Enter a **Start Date** and **End Date** for the schedule. Remember to save any changes to the schedule by selecting the **Save** button.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help

Unit Status Status -> Unit Status (Schedule CSV Unit)

**Unit Definition**

Title: Schedule CSV Unit

Owner: no selection

State:  inactive  active  completed  suspended  demonstration

Refresh Order: 0 refresh reload

Schedule:  basic schedule mode  advanced schedule mode

Monthly Schedule 2006 - 2008

Progress Report: no selection

Office Template: no selection

Dates: Start Date: January 1 2008 End Date: December 31 2008

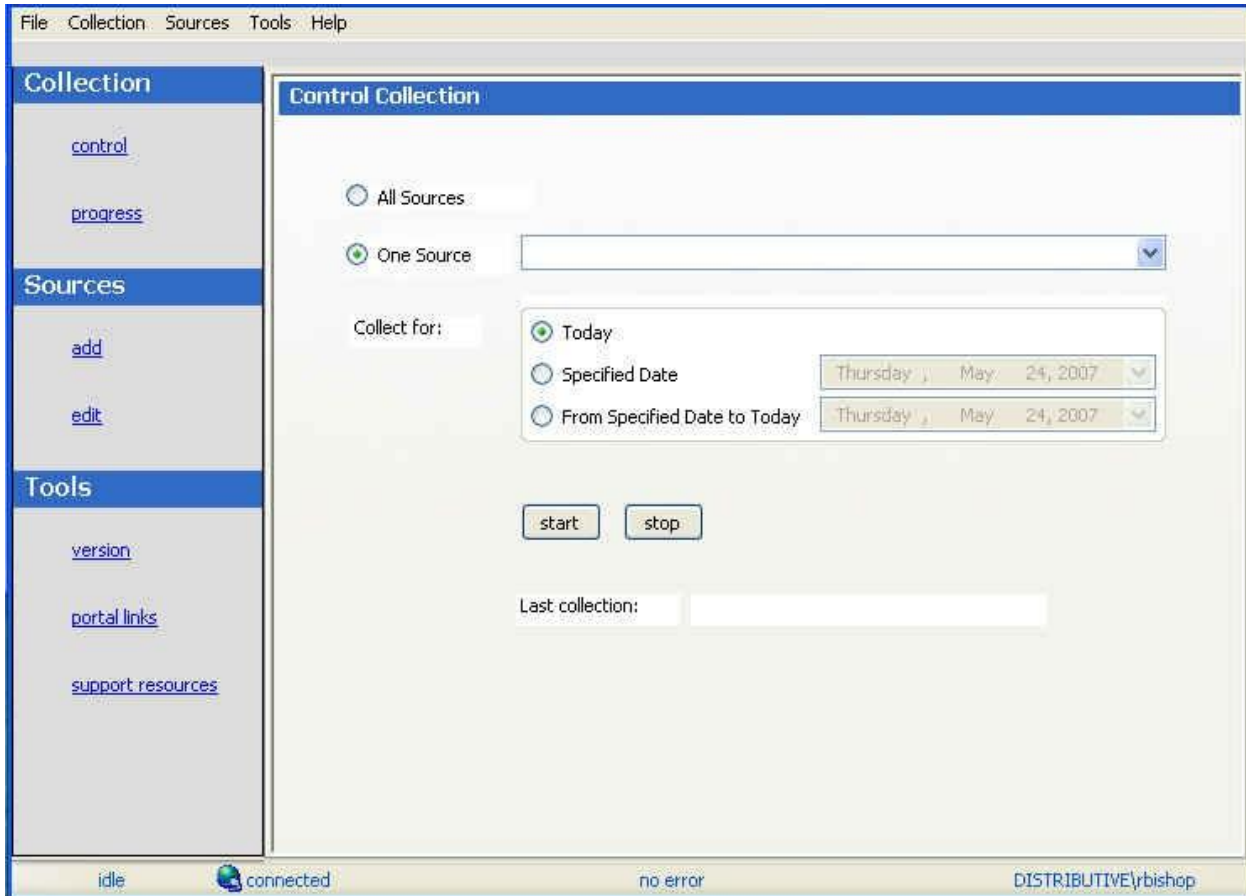
Description:

URL: [ + ] Hyperlink

At this point, you're ready to configure your Collector and collect your data.

# Configuring the Collector

Open the Collector from Start, Programs, and Telelogic Dashboard.



The next step is to verify the connection to Web Services.

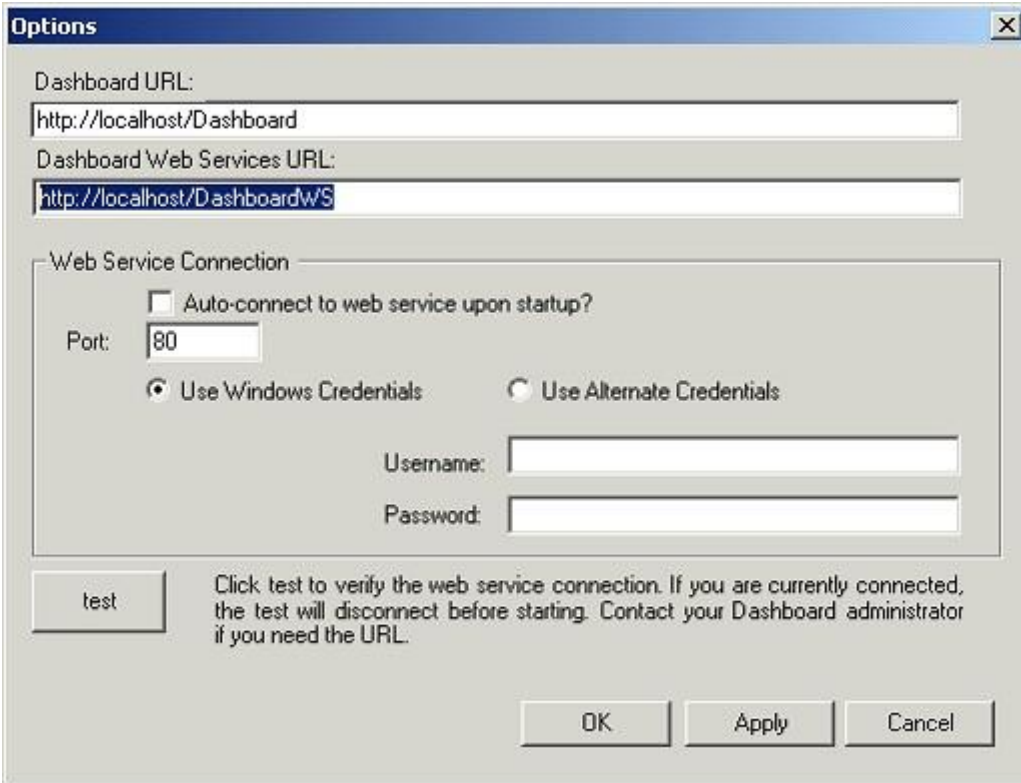
## Verify Connection to Web Services

The Dashboard Collector uses the Dashboard Web Services to communicate with the Dashboard Portal. To verify your connection to the Dashboard Web Services, click File, Options from the menu bar. By default the Dashboard Web Services URL is set to:

`http://localhost/DashboardWS`

If you are running the collection from the server that is running the Dashboard Portal then "localhost" will work fine. If you are running the collection from a machine other than the Portal server you will need to change the "localhost" part of the URL to the name of the server running the Dashboard Portal. Be sure to click the "Apply" button if you make any changes.

Click the test button to test the connection.



The screenshot shows the 'Options' dialog box with the following fields and controls:

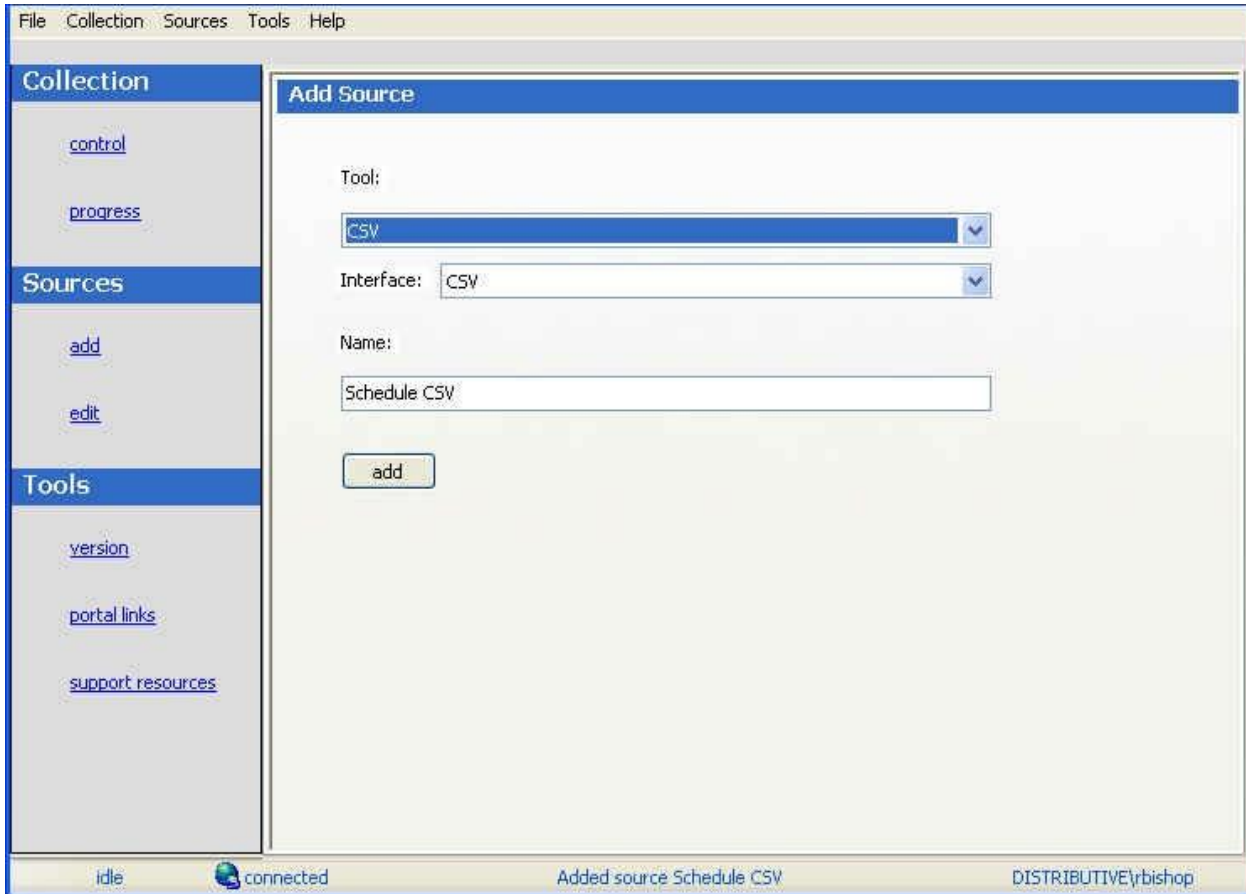
- Dashboard URL:** `http://localhost/Dashboard`
- Dashboard Web Services URL:** `http://localhost/DashboardWS`
- Web Service Connection:**
  - Auto-connect to web service upon startup?
  - Port: `80`
  - Use Windows Credentials  Use Alternate Credentials
  - Username:
  - Password:
- test** button: Click test to verify the web service connection. If you are currently connected, the test will disconnect before starting. Contact your Dashboard administrator if you need the URL.
- OK**, **Apply**, and **Cancel** buttons at the bottom.

If after pressing the "test" button, you receive an error or warning message. Review the message and your web services configuration to correct the problem. The web services configuration information is contained in the web.config in the Web Services folder, usually `C:\Program Files\Telelogic\Dashboard\WebServices`.



## Add a Source

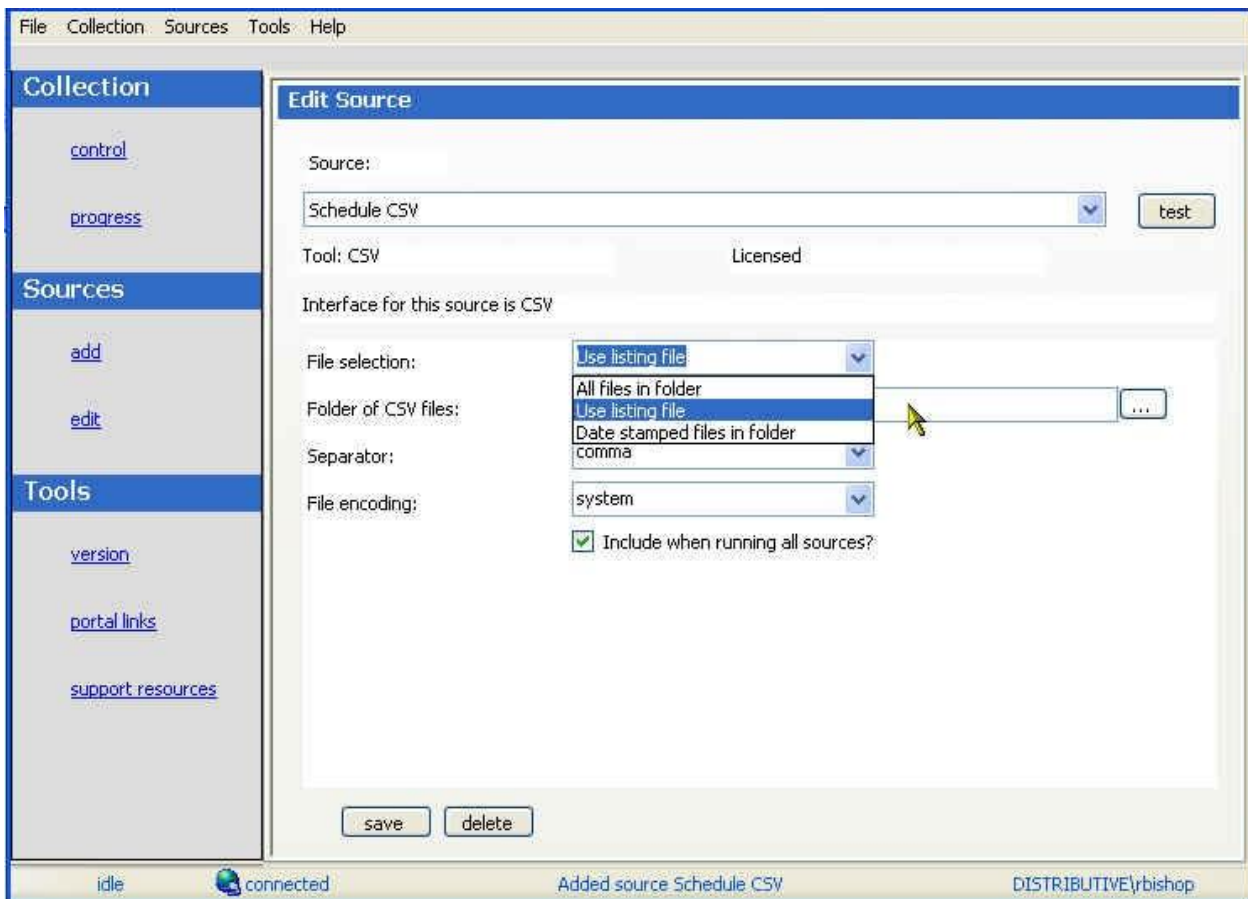
Choose sources/add from the left menu. Select CSV as the Tool, and give your source a name. You will notice a drop down list of Interfaces below the Tool selection. This is used for to delineate between different instances of a tool and let the Collector know which Interface to use when collecting from a specific source. You'll want to select your CSV Interface from this drop down. Once you've done that, click Add.



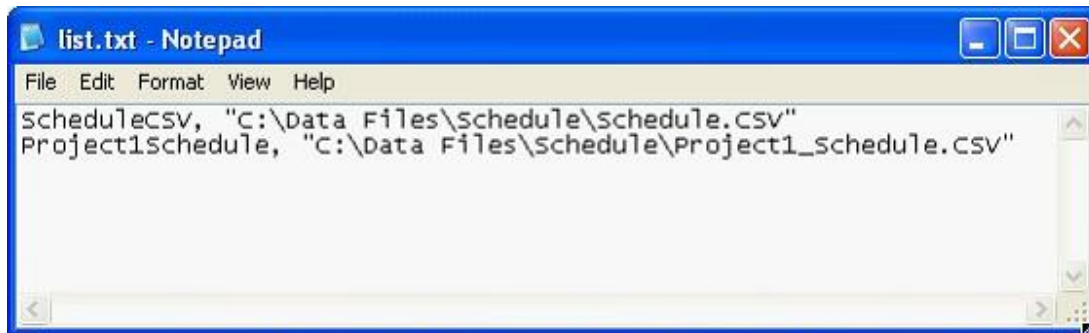
The next step is to setup the collector.

## Set Up the Collector

The setup for a CSV requires some basic information about the file. First of all, there are several ways to bring in a CSV file. The first is **"All Files in a Folder"**. For this option you chose a folder in the file system and the Collector will try to collect the fields that you set up in the Interface from all of the CSV files in that folder. One use for this would be if the same report was coming in from several different projects but had the same structure and similar data. In this case you could have all of the projects put their files in the same folder and the Collector would collect them individually. The folder that the files are in should be selected as the "Folder of CSV Files".



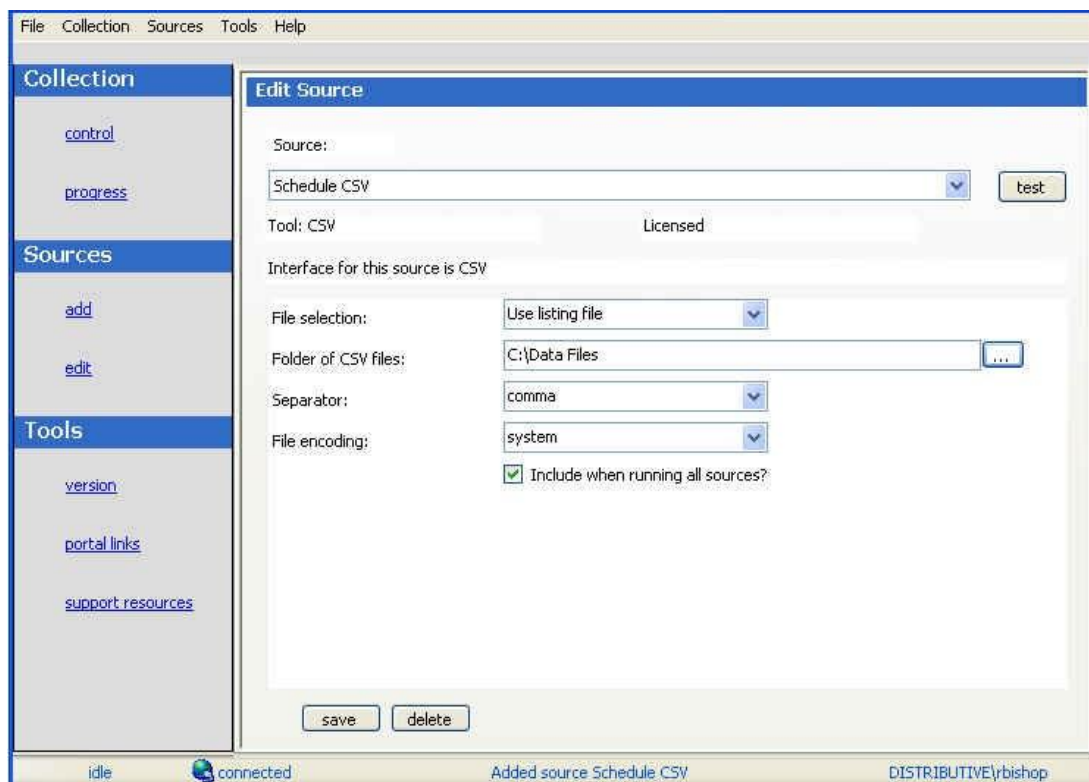
The second option is **“Use Listing File”**, which uses a file called list.txt file to list all of the files to collect. Each line in the listing file consists of a title in double quotes of the item as it will be seen in the Dashboard Portal, followed by the full path to the file. An example is show in the image below.



You must create this file and choose which folder this file is contained within.

The final option is using **“Date Stamped Files in a Folder”**. This option allows you to put files in a given folder that have a date stamp on them showing when they should be collected for. The format for these file names should be <filename>\_yyyymmdd.csv. The dates should match the Collection date for the schedule that is assigned to your item. The default schedule has a collection date of the last day of the month, so an example would be schedule\_20070131.csv, which would have data for the month of January in 2007.

Be sure to save your settings by clicking the save button in the bottom left corner.



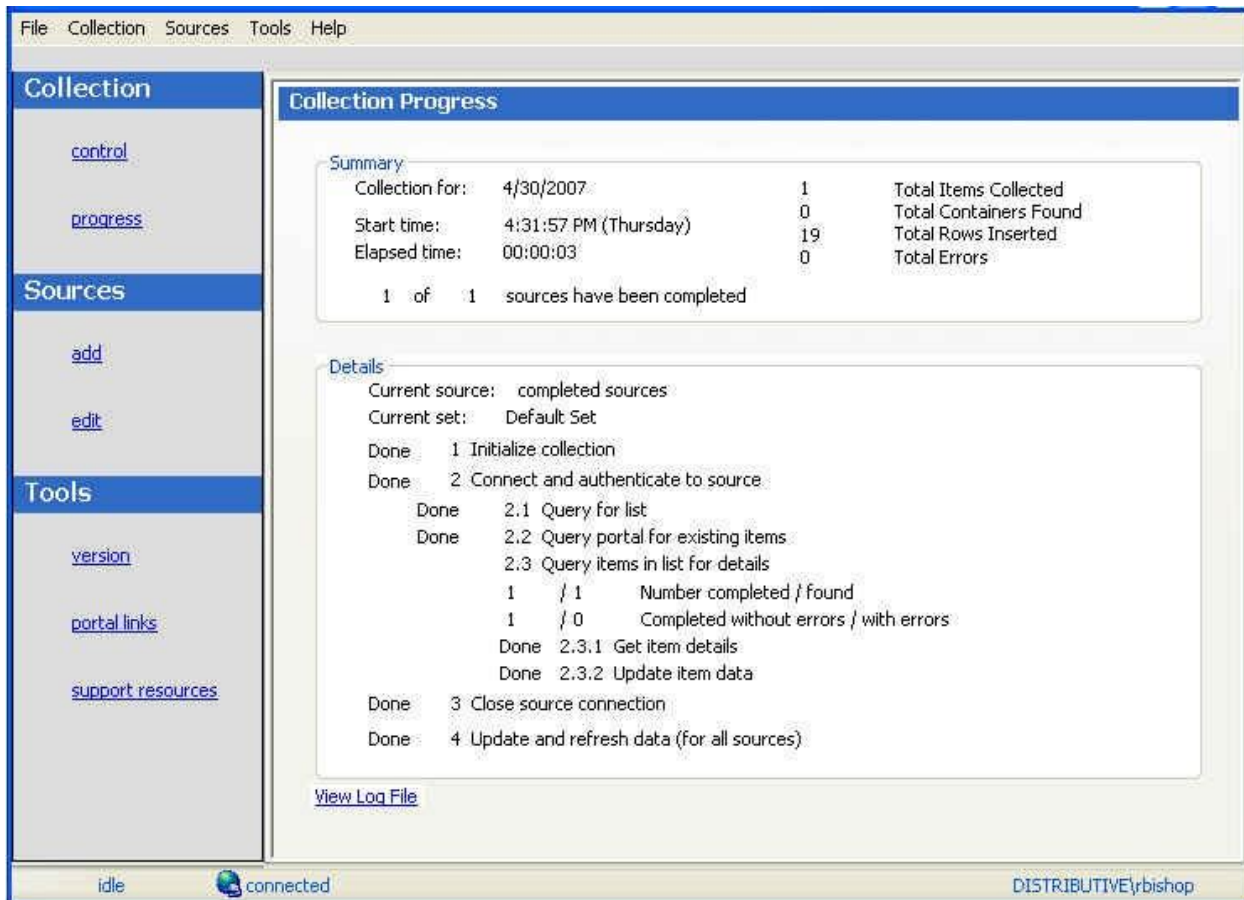
The next step is to run a collection.

## Running a Collection

Once you've saved your configurations, you're ready to run your collection. Go to the **control** link in the Collection section. Click the radio button for One Source and select your CSV source from the drop down on the right. Below the drop down, select "Specified Date" and choose the last day of the previous month. The default schedule for the Dashboard is a schedule that collects data on the last day of the previous month, so selecting this date will let you automatically see data in your graphs once the default information is applied. See the Help files for more information about how schedules affect the Collector.

Once you've picked your source and your date, click on the **start** button.

The **Collection Progress** page will appear and you will be able to track your collection as it runs. You'll see in the details on the bottom the number of **items** and **containers** that were found and see how far you've gotten through the collection.



The screenshot displays the 'Collection Progress' page. On the left, there is a navigation menu with sections for 'Collection' (containing links for 'control' and 'progress'), 'Sources' (containing links for 'add' and 'edit'), and 'Tools' (containing links for 'version', 'portal links', and 'support resources'). The main content area is titled 'Collection Progress' and is divided into two sections: 'Summary' and 'Details'. The 'Summary' section provides a high-level overview of the collection for 4/30/2007, including the start time (4:31:57 PM Thursday), elapsed time (00:00:03), and counts for 1 source completed, 1 total item collected, 0 total containers found, 19 total rows inserted, and 0 total errors. The 'Details' section provides a step-by-step log of the collection process, showing steps like 'Initialize collection', 'Connect and authenticate to source', and 'Query for list' with sub-steps and completion status. A 'View Log File' link is provided at the bottom of the details section. The status bar at the bottom indicates the collector is 'connected' and shows the version 'DISTRIBUTIVEyrbishop'.

Collection for:	4/30/2007	1	Total Items Collected
Start time:	4:31:57 PM (Thursday)	0	Total Containers Found
Elapsed time:	00:00:03	19	Total Rows Inserted
		0	Total Errors

1 of 1 sources have been completed

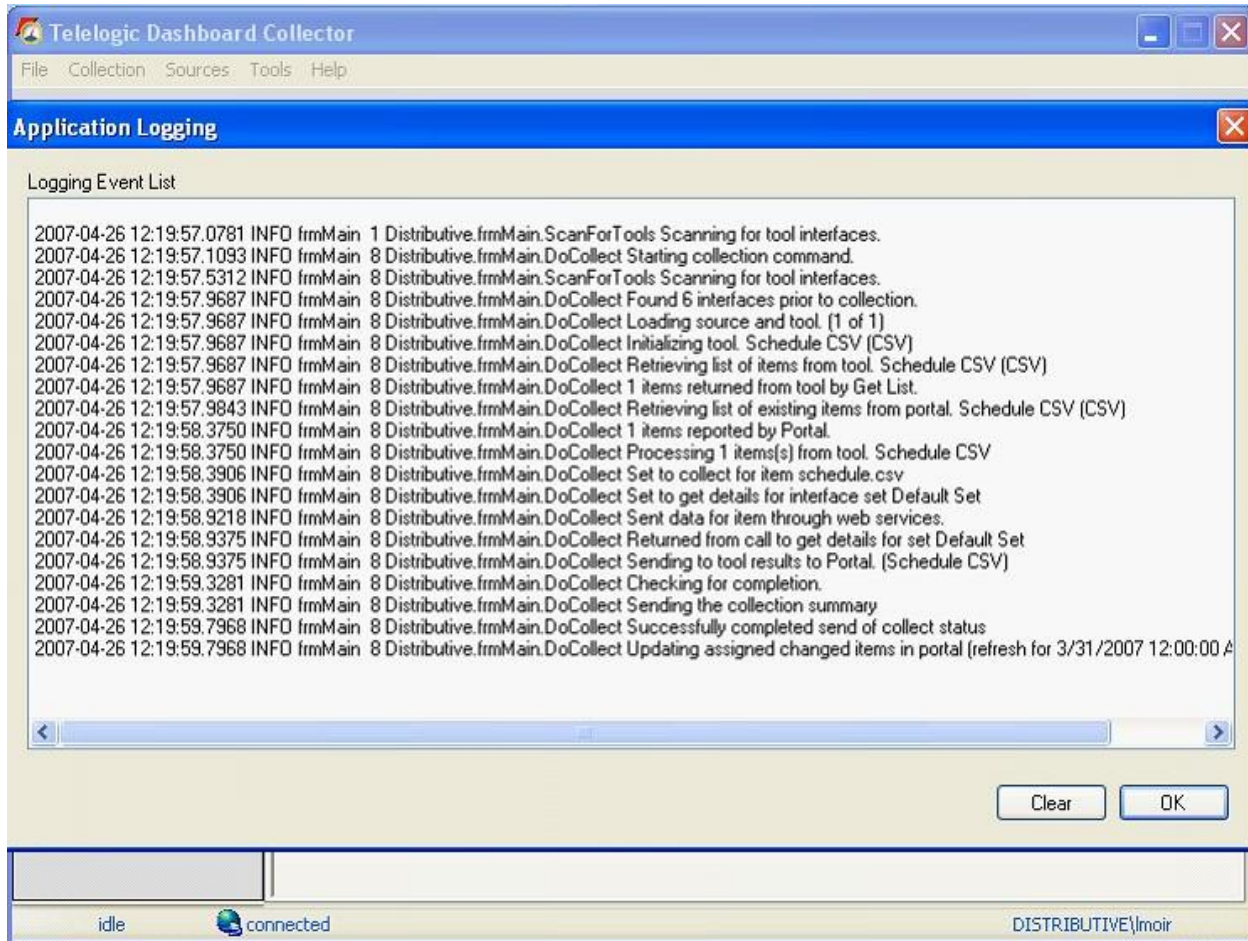
Current source: completed sources  
Current set: Default Set

Done 1 Initialize collection  
Done 2 Connect and authenticate to source  
Done 2.1 Query for list  
Done 2.2 Query portal for existing items  
Done 2.3 Query items in list for details  
1 / 1 Number completed / found  
1 / 0 Completed without errors / with errors  
Done 2.3.1 Get item details  
Done 2.3.2 Update item data  
Done 3 Close source connection  
Done 4 Update and refresh data (for all sources)

[View Log File](#)

Once your collection finishes, the **summary** box at the top of the collector will tell you information about the collection itself, how long the collection took, how many **items** were collected, how many rows were inserted into the database tables and how many errors were encountered, if any.

If your collection does have errors, you can click on the "View Log File" link at the bottom of the progress page. This will open up the log file (which can also be reached under the File menu). This log file gives you information on why a module may not have been collected.

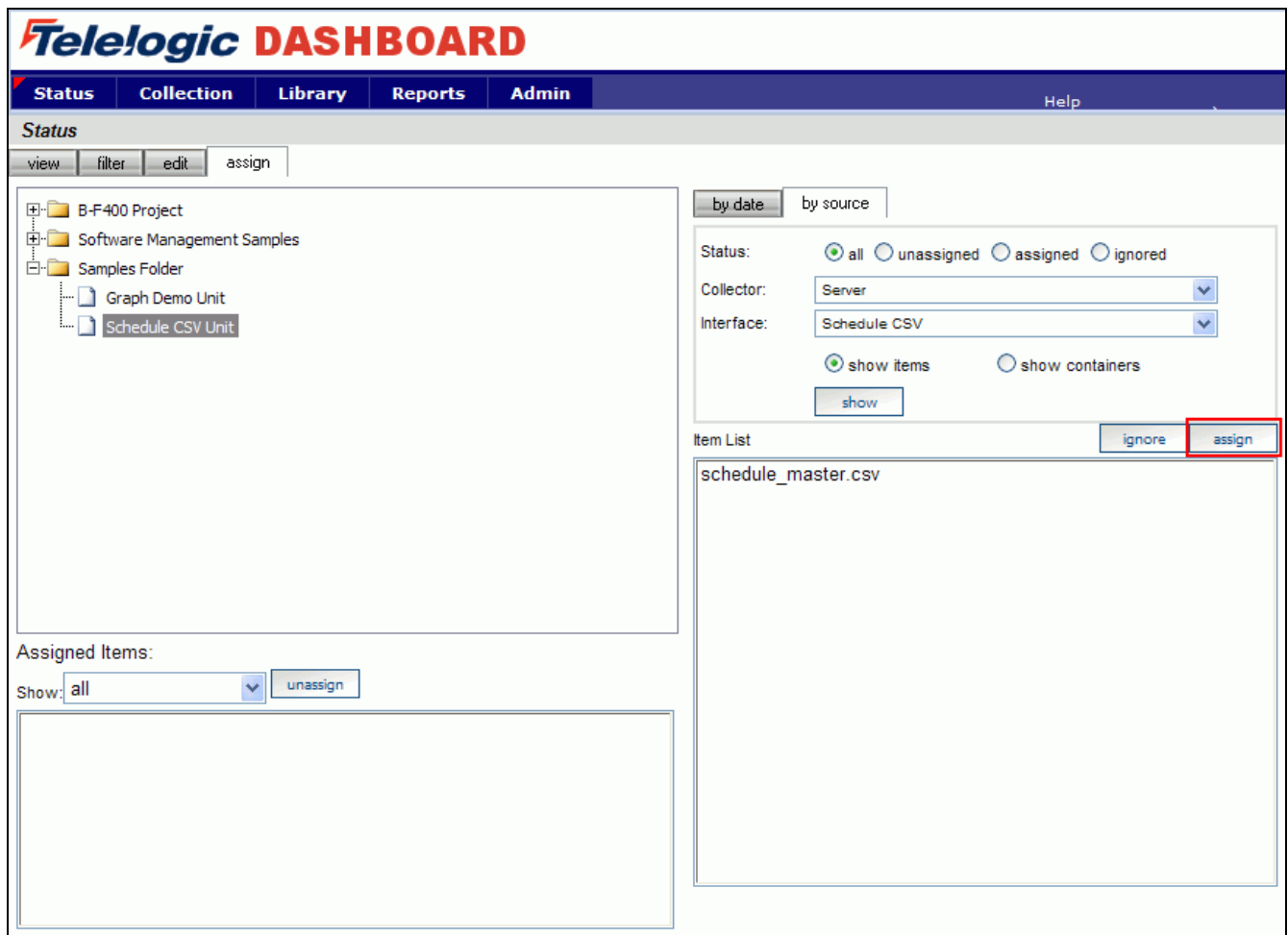


The next step is to configure the unit.

# Configuring the Unit

## Assigning Collected Items

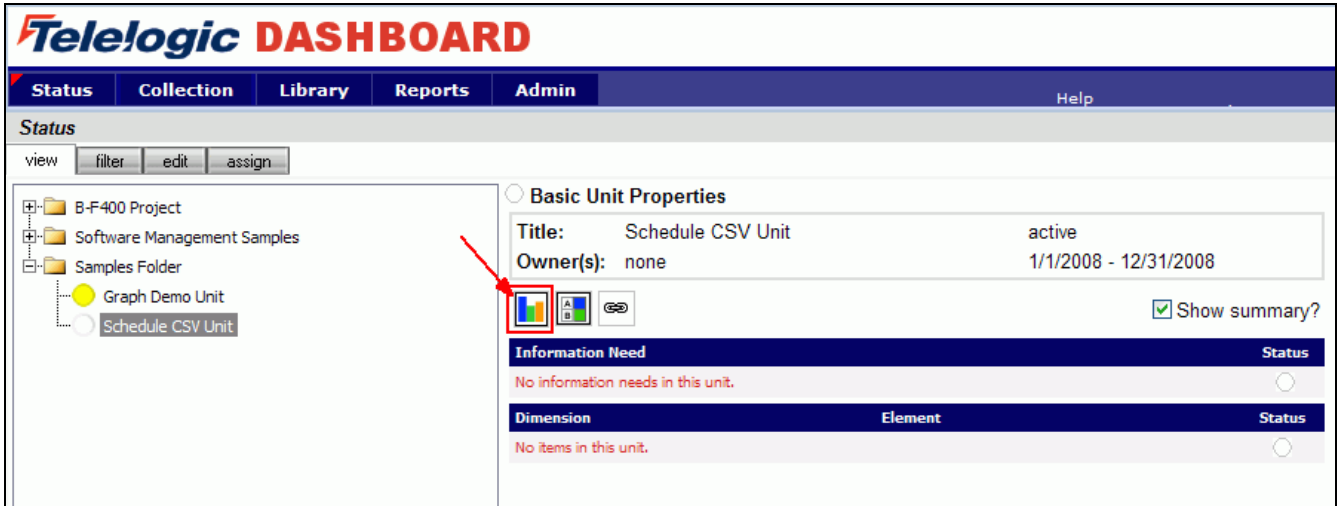
Once you've run your collection without errors, you're ready to add your **Items** to your **Unit**. Go back to the **Status** page and click on the **assign** subtab. Click on the Unit you created earlier. On the right hand side, click on the **by source** subtab. From the drop down menus, choose your Collector and the interface that you're using to collect. When you've selected those options, click on the **show** button. In the list below you will see a list of all of the **items** that have been collected. Click on the items that you want to add to this unit and then click on the **assign** button on the right hand side.



Now, if you look on the left hand side, you'll see your list of items set as Assigned Items. Now all you have to do is assign your Information Need and you will see data in your graphs.

## Assigning the Information Need to the Unit

Staying on the Status tab, click on the **view** subtab and select your unit from the tree on the left hand side. On the right hand side, select the **graph** button.



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The 'Status' tab is active, and the 'view' subtab is selected. On the left, a tree view shows the following structure:

- B-F400 Project
  - Software Management Samples
    - Samples Folder
      - Graph Demo Unit
      - Schedule CSV Unit

The 'Schedule CSV Unit' is selected. On the right, the 'Basic Unit Properties' section shows:

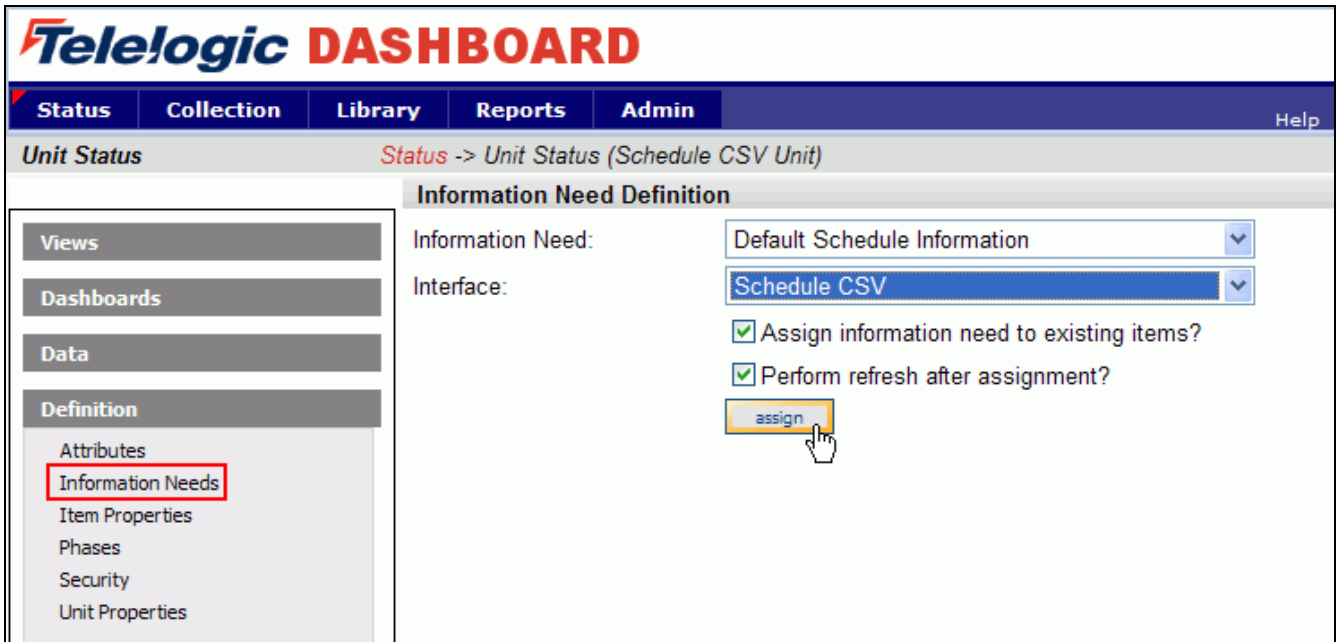
- Title: Schedule CSV Unit
- Owner(s): none
- Status: active
- 1/1/2008 - 12/31/2008

Below this, there are two sections:

- Information Need**: No information needs in this unit. Status:
- Dimension**: No items in this unit. Element: Status:

A red box highlights the 'graph' button (represented by a bar chart icon) and a red arrow points to it.

This will open the Unit Status window and display an empty GANTT chart with your items listed along the side. From there, click on the **Information Need** link under the Definition section.



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The 'Unit Status' window is open, showing the 'Status -> Unit Status (Schedule CSV Unit)'. The 'Information Need Definition' section is visible, showing the following configuration:

- Information Need: Default Schedule Information
- Interface: Schedule CSV
- Assign information need to existing items?
- Perform refresh after assignment?

An 'assign' button is highlighted with a red box and a mouse cursor is pointing to it. On the left, a sidebar menu shows the following structure:

- Views
- Dashboards
- Data
- Definition
  - Attributes
  - Information Needs
  - Item Properties
  - Phases
  - Security
  - Unit Properties

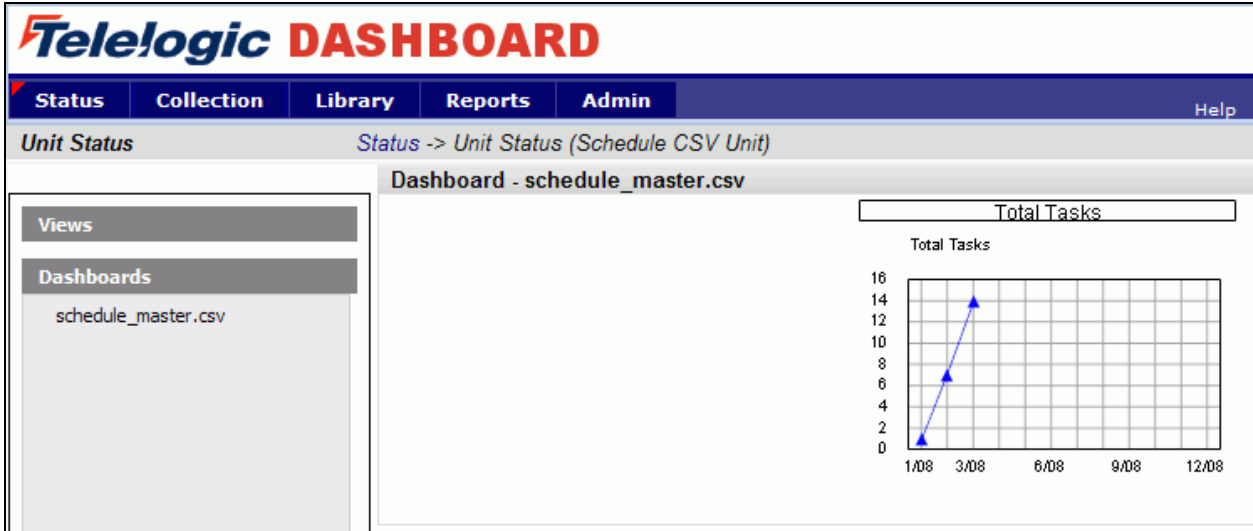
The 'Information Needs' link is highlighted with a red box.

From the drop down lists, select the **Information Need** and the **Interface** that you are using. When you've selected these, click the **assign** button. The next step is to view your data in the Portal.

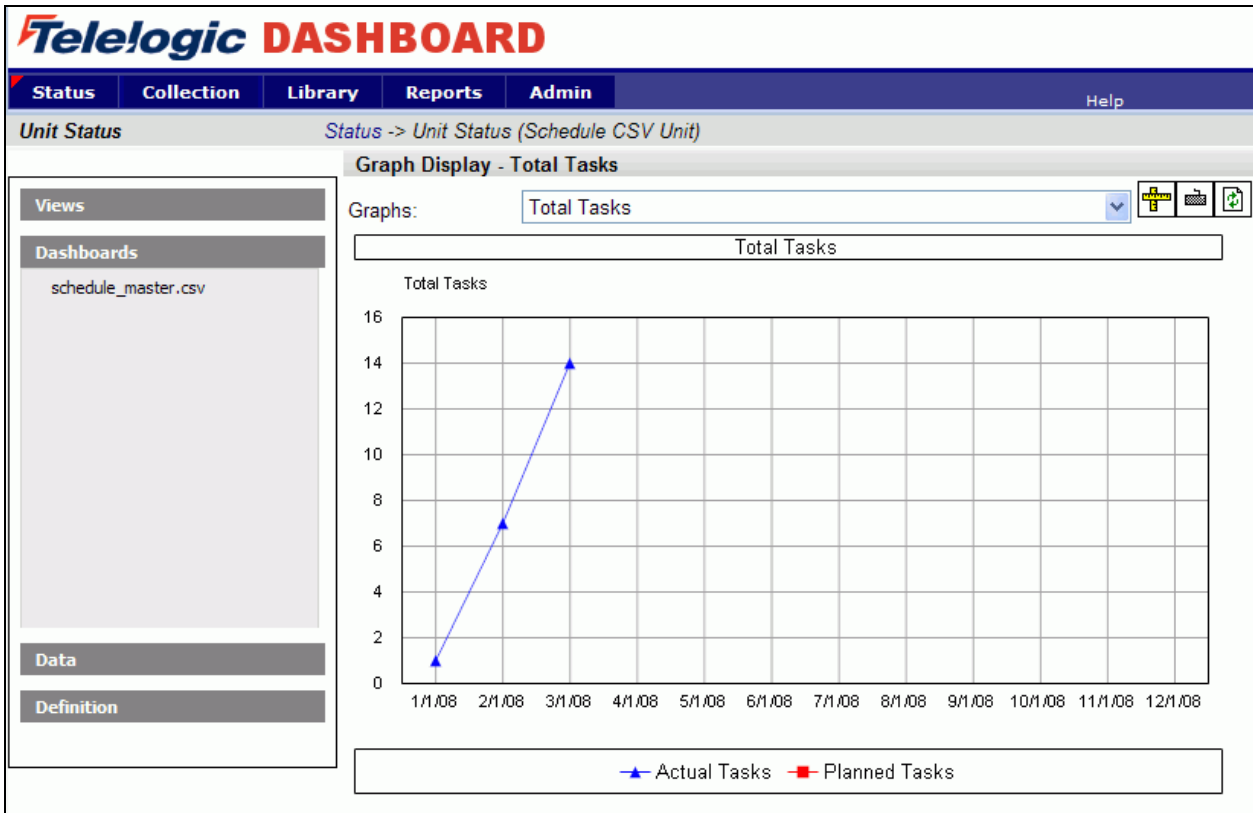


## View Data in the Portal

Now you're ready to see your data. Once you're back on the status page in your Unit, select a managed item to view. You should see a data point in your graphs for the date that you ran the collection.



For our example, since we were using a manual data entry series, we will need to edit the data for the graph before an alarm status will show. Click on the graph to show the full size graph.



Above the full graph, there is the **edit data** button with an icon that looks like a keyboard. Click this button.



This will open the Graph Definition window for the selected graph.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help

Graph Definition Status -> Unit Status (Schedule CSV Unit) -> Graph Definition (Total Tasks)

graph series data

Title: Total Tasks (1183) Abbrev:

Type: Run Graph [Change Graph Type](#) Refresh Order: 0

Status:  None  
 Worst case of all alarms  
 Use single alarm

Frequency:  Event-based   
 Schedule-based

Note: Schedule for graph is locked in basic schedule mode.  
 Item starts 1/1/2008 and ends 12/31/2008.

Description:

save cancel

From here, click on the **data** subtab. On the **data** subtab, you can put in data for the Planned tasks series that will let the graph show Status data. In the example below, data is put in that will trigger both red and green status on the graph.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

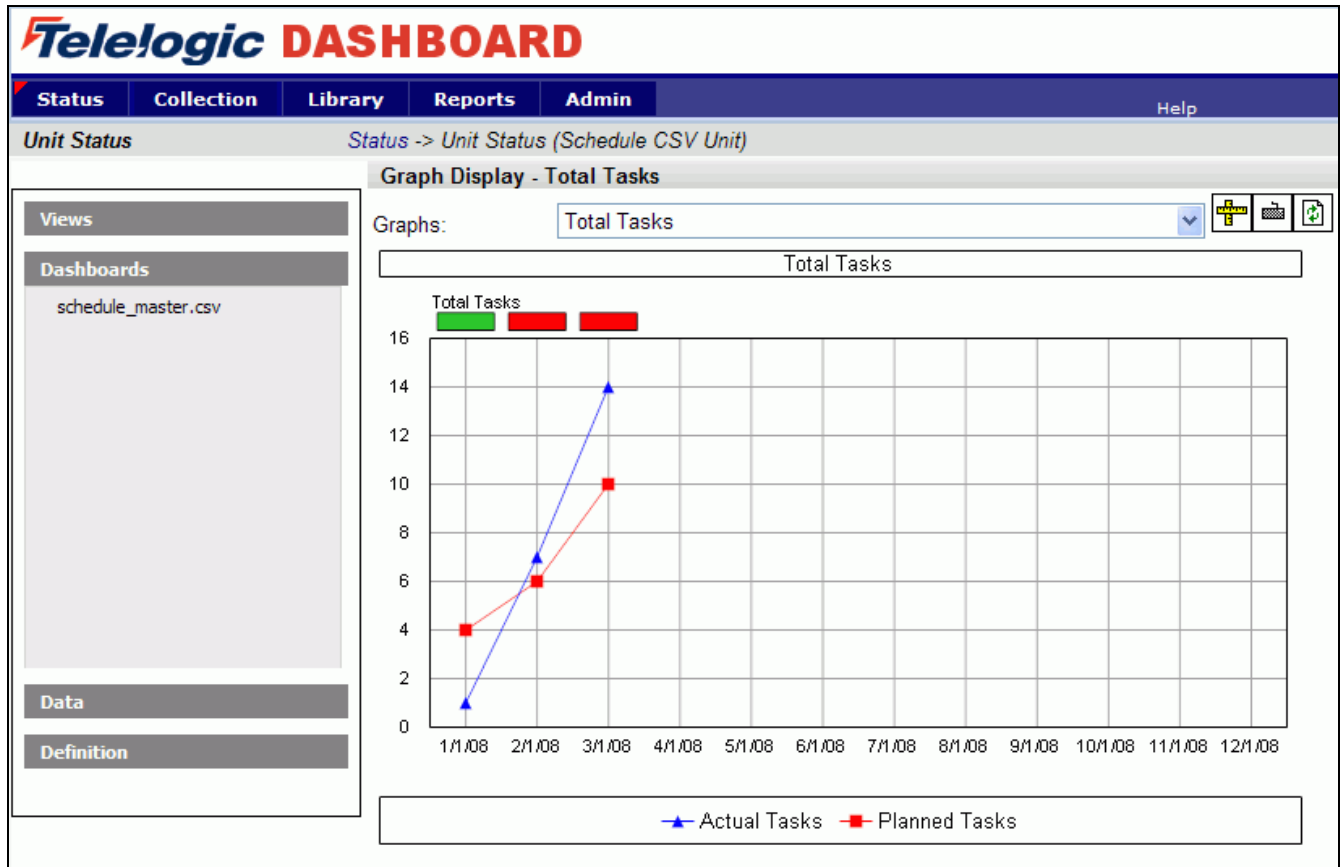
Graph Definition Status -> Unit Status (Schedule CSV Unit) -> Graph Definition (Total Tasks)

graph series data

	Actual Tasks	Planned Tasks	Total Tasks
1/1/2008 - 1/31/2008	1	<input type="text" value="4"/>	green
2/1/2008 - 2/29/2008	7	<input type="text" value="6"/>	red
3/1/2008 - 3/31/2008	14	<input type="text" value="10"/>	red
4/1/2008 - 4/30/2008		<input type="text"/>	
5/1/2008 - 5/31/2008		<input type="text"/>	
6/1/2008 - 6/30/2008		<input type="text"/>	

Save this data and return to the graph view.

The data and alarm should now show data.



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