

***Telelogic Dashboard  
Change 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 Change 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.

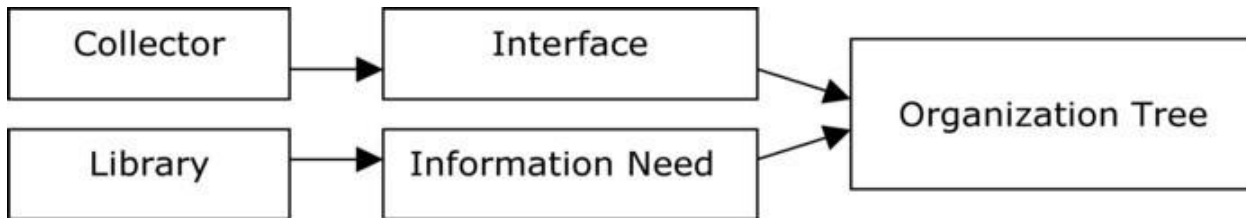
Telelogic Dashboard spans the gap between the management process desired and the one currently in place. Focus on managing by exception using Telelogic Dashboard alerts, analysis, graphical displays and drillable views that provide all the information needed to make well-informed decisions quickly. Using 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**.

## Telelogic Change Sample Walkthrough

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

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

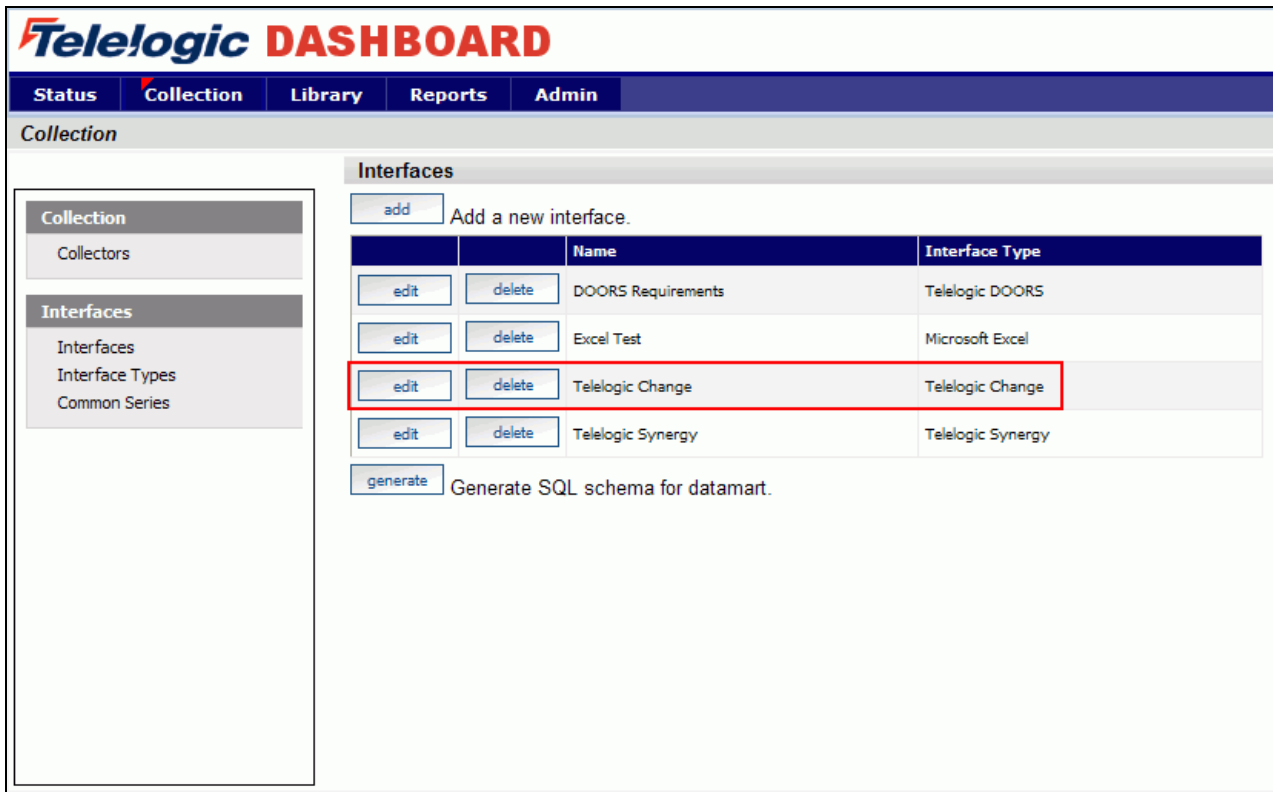
- Portal Configuration:
  - Examine/Configure an Interface in the Portal
  - Examine/Configure an Information Need
  - Assigning Schedules to a Template
  - Setup a Unit with Information Needs (or use a template)
- Collector Configuration
  - Configure the Collector
  - Run a collection
  - Check/Resolve 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

## 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 Telelogic Change.

### Verifying the Interface in the Portal

Upon opening the application, the Portal defaults to the Status page. The first step is to verify the Interface. 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, Library, Reports, and Admin. The 'Collection' tab is active. On the left, a sidebar menu shows 'Collection' and 'Interfaces' sections. The 'Interfaces' section is expanded, showing options for 'Interfaces', 'Interface Types', and 'Common Series'. The main content area displays the 'Interfaces' list, which includes a table with columns for 'Name' and 'Interface Type'. The 'Telelogic Change' interface is highlighted with a red border. Below the table, there is a 'generate' button and a label 'Generate SQL schema for datamart.'

		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 **edit** button to open the Telelogic Change interface.

The interface will open in the **general** tab. This is where all the information about what is being collected is stored. This specific interface is a default interface for Telelogic Change. You will notice that a short description has been entered and the Transform Server has been selected as the Database.

**Telelogic DASHBOARD**

Status **Collection** Library Reports Admin

*Edit Interface* Collection -> Edit Interface (Telelogic Change)

general fields queries

Name: Telelogic Change (4)

Interface Type: Telelogic Change

Description: Change tracking at organizational level

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?

Next, click on the fields tab.

## Setting up the Fields

The information entered in the **fields** tab of the Interface defines the information that will be collected and where it will be stored. The list of sets (each containing a group of fields) and the database where the information will be stored is located on the left section of the screen. A list of default fields, which are being collected by the Portal, is located on the right hand section of the screen. The list of fields displayed changes based on the set selected from the **List of Sets** drop down menu. These fields are the default values that all of the graphs will use to display the data.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help

Edit Interface Collection -> Edit Interface (Telelogic Change)

general fields queries

List of Sets:  
Default Set

add

Title: Default Set  
Database Table: SynergyChange

[+] Parameter Replacement Tag:  
apply delete

Fields in Selected Set:  
add

displayname - displayname (text 50)  
release - release (text 50)  
crstatus - crstatus (text 50)  
request\_type - request\_type (text 50)  
priority - priority (text 50)  
severity - severity (text 50)

Selected Field Properties  
 Do not collect from source?

Source Attribute: displayname  
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.

Table Field: displayname  
Type: Text 50  
Value:  Allow null - default optional default value:   
 Don't allow null - default required  
apply delete

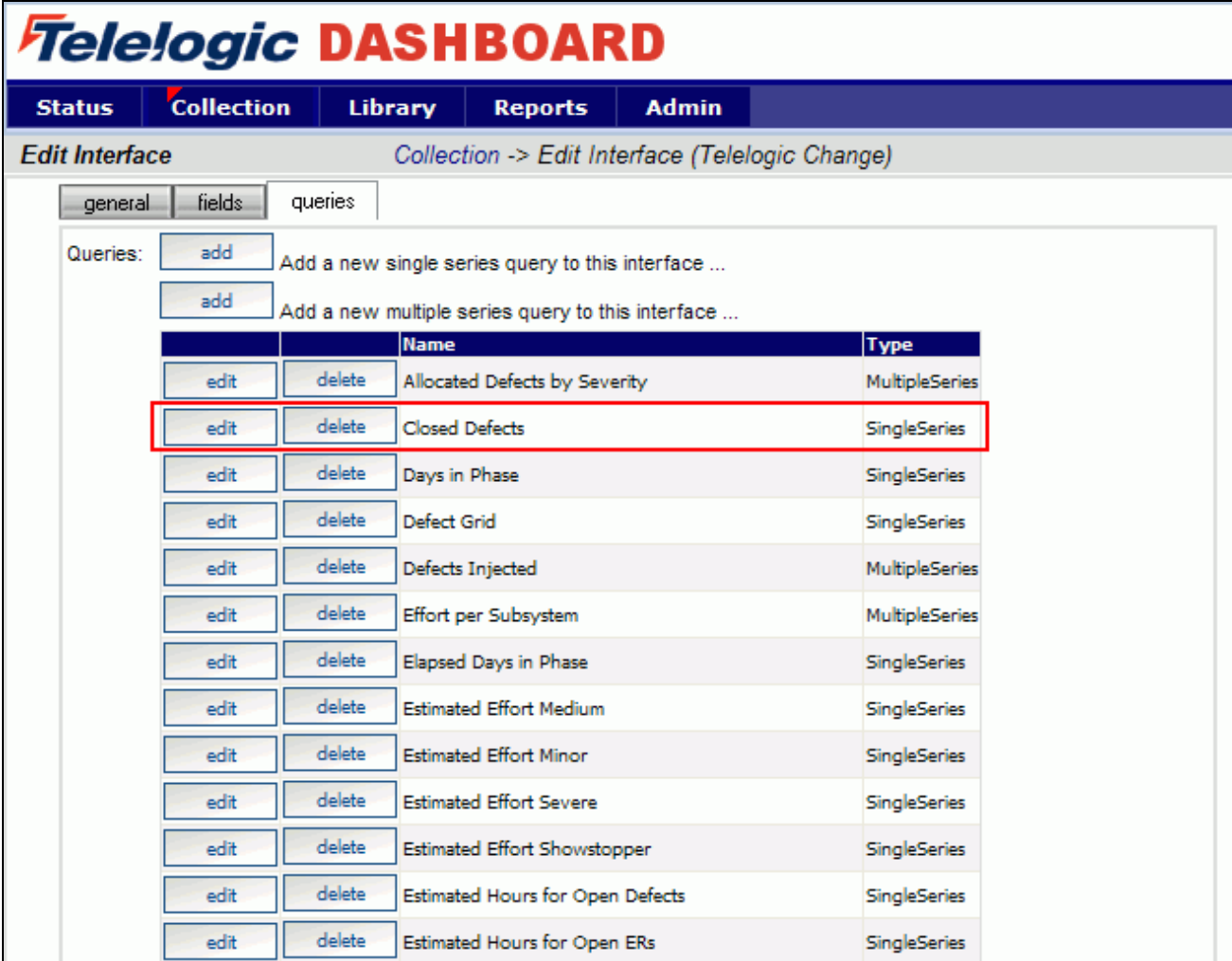
save cancel  Add (new) table fields during save?  Update or delete table fields during save?

Next, click on the queries tab.



## Modifying the Data Queries

The Query tab will list all of the queries assigned to the Interface. These queries are used to count and quantify the data that is collected.



**Telelogic DASHBOARD**

Status Collection Library Reports Admin

Edit Interface Collection -> Edit Interface (Telelogic Change)

general fields queries

Queries:  Add a new single series query to this interface ...  
 Add a new multiple series query to this interface ...

		Name	Type
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Allocated Defects by Severity	MultipleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Closed Defects	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Days in Phase	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Defect Grid	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Defects Injected	MultipleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Effort per Subsystem	MultipleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Elapsed Days in Phase	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Estimated Effort Medium	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Estimated Effort Minor	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Estimated Effort Severe	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Estimated Effort Showstopper	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Estimated Hours for Open Defects	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Estimated Hours for Open ERs	SingleSeries

Clicking the **edit** button, for a query in the main list, will open the Edit Query page and allow the user to edit the selected query.

Below is the **Edit Query** page for Closed Defects. There are two options available when modifying a query: Query Builder and Query Edit.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

*Edit Query* Collection -> Edit Interface (Telelogic Change) -> Edit Query

Title: Closed Defects

Common Series: Defects - Closed Defects

Query Builder Query Edit Test Query

1 Data from: SynergyChange database table

2 Result is:  a count of  a sum of displayname (Default Set)

3 Filters are:  the current item  for the current period

4 With terms:

```
request_type = 'Defect'
crstatus IN (%A(Synergy Status Closed)%)
```

Add new query term:

displayname (Default Set) = Start Date

To modify this query, click on the **Query Edit** button.

The Edit Query tab has a **text field** where the SQL statements can be entered, modified or deleted. You can place your cursor anywhere in the text field to add or modify the query. At this point we could modify the statement or delete a portion of the query.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

Edit Query Collection -> Edit Interface (Telelogic Change) -> Edit Query

Title: Closed Defects

Common Series: Defects - Closed Defects

Query Builder Query Edit Test Query

```
SELECT COUNT(*) FROM %TABLE% WHERE g_itemid=%ITEMID% AND
g_collectdate=%COLDATE% AND request_type = 'Defect' AND crstatus
IN ('%A(Synergy Status Closed)%')
```

save

If any changes are made to the query, be sure to save your changes.

## Verifying the Information Need

This step is optional, as no changes need to be made in the Information Need to help the Collector run. This will allow you to familiarize yourself with the graphs that will be displaying data in the future. To see the Information Needs, click on the **Library** tab of the Portal.

There are six information needs that are setup to work with Telelogic Change automatically. They are: Defect Productivity, Defect Quality, Defect Schedule, Enhancement Productivity, Enhancement Quality and Enhancement Schedule.

The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes Status, Collection, Library (selected), Reports, Admin, and Help. The main content area is titled 'Library' and contains an 'Information Need List'. On the left, there is a sidebar with 'Library' (Information Need List, Dimension List, Unit Template List) and 'Tasks' (Tailoring). The main list has columns for 'edit', 'delete', 'created on', 'created by', and 'title'. Six rows are highlighted with a red border: Defect Productivity, Defect Quality, Defect Schedule, Enhancement Productivity, Enhancement Quality, and Enhancement Schedule.

		created on	created by	title
<input type="button" value="edit"/>	<input type="button" value="delete"/>	07 Feb 07	Default	CM Appropriate Use
<input type="button" value="edit"/>	<input type="button" value="delete"/>	07 Feb 07	Default	CM Change Rate
<input type="button" value="edit"/>	<input type="button" value="delete"/>	07 Feb 07	Default	CM Management
<input type="button" value="edit"/>	<input type="button" value="delete"/>	07 Feb 07	Default	CM Work Quality
<input type="button" value="edit"/>	<input type="button" value="delete"/>	18 Oct 06	Default	CMMI level 2 Implementation Status
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Cost Control
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Defect Productivity
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Defect Quality
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Defect Schedule
<input type="button" value="edit"/>	<input type="button" value="delete"/>	03 Jan 08	Default	Earned Value Management
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Enhancement Productivity
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Enhancement Quality
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Enhancement Schedule
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Graphing Samples
<input type="button" value="edit"/>	<input type="button" value="delete"/>	03 Jan 08	Default	Peer Reviews

Let's take a look at the information need, Defect Quality. To open the information need, click on the **edit** button.

The information need will default to the **general** tab. The information need, Defect Quality, contains graphs that will track the quality of the delivered software.

The screenshot shows the 'Telelogic DASHBOARD' interface. The navigation bar includes 'Status', 'Collection', 'Library' (selected), 'Reports', and 'Admin'. The page title is 'Information Need' with a breadcrumb 'Library -> Information Need (Defect Quality)'. Below the title are tabs for 'general', 'reference', 'guidance', 'graphs', and 'dimensions'. The 'general' tab is active. The form contains the following fields:

- Title:** Defect Quality (7)
- State:** Radio buttons for draft, defined (selected), active, and retired. A checkbox 'May be exported to other sites?' is also present.
- Keywords:** A text area containing 'defect management' and 'quality management'.
- Description:** A text area containing 'This information need contains a series of graphs to manage the quality of delivered software items by tracking submitted defects.'

At the bottom, it shows 'Created on 1/1/2006 Created by Default Updated on: 2/1/2008' and 'save' and 'cancel' buttons.

Selecting the **graphs** tab will list the graphs associated with the selected information need. In the sample below, Defect Quality has seven graphs defined. The various graph descriptions and series for each of the listed graphs can be edited here. When the Information Need is added to a unit, the graphs are applied to the data.

The screenshot shows the 'Telelogic DASHBOARD' interface with the 'graphs' tab selected. The page title and breadcrumb are the same as in the previous screenshot. The 'graphs' tab is active, showing the following configuration:

- Current Actual:** Defect Arrival Rate\Total New
- Current Plan:** Defect Arrival Rate\Planned Defects
- Current Status:** Defect Arrival Rate>Showstopper Alarm

Below these are the following settings:

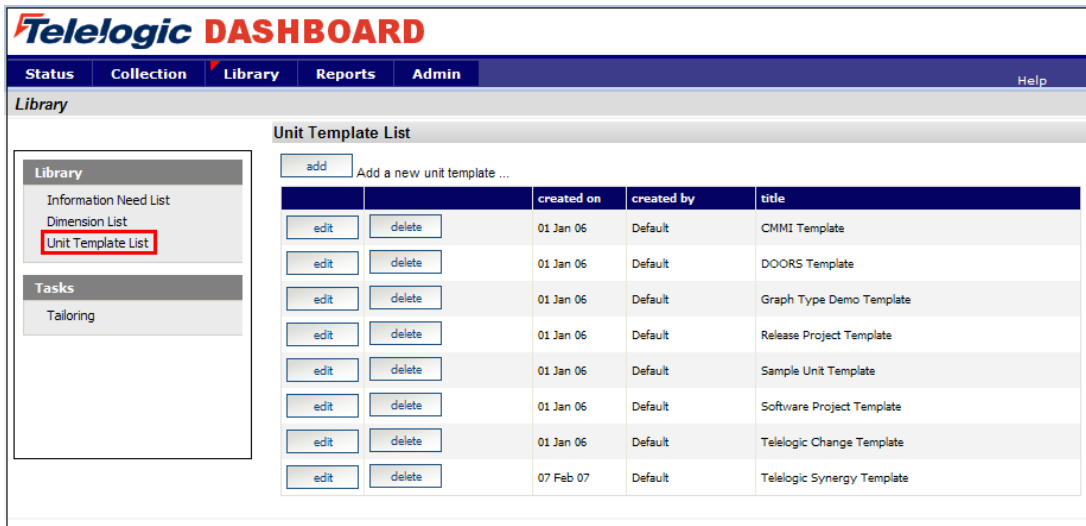
- 7 graphs defined.**
- Graphs:** A list of seven graphs: Defect Arrival Rate (Run), Defects By Phase Injected (VerticalBar), New Defects (VerticalBar), Open Defect Age- Severe (Run), Open Defect Age- Showstopper (Run), Open Defects (VerticalBar), and Open Reported Defects (Run). Buttons for 'edit', 'delete', and 'add' are present, along with a link 'Add new graph ...'.

At the bottom, it shows 'save' and 'cancel' buttons.

## Assign a Schedule to a Change Template

This is an optional step that is not required in the setup process. To assign a schedule to a unit when using a template, it is necessary to add a schedule to the template before creating a unit using the template. If a schedule is not included in the template, the unit schedule will default to a monthly schedule.

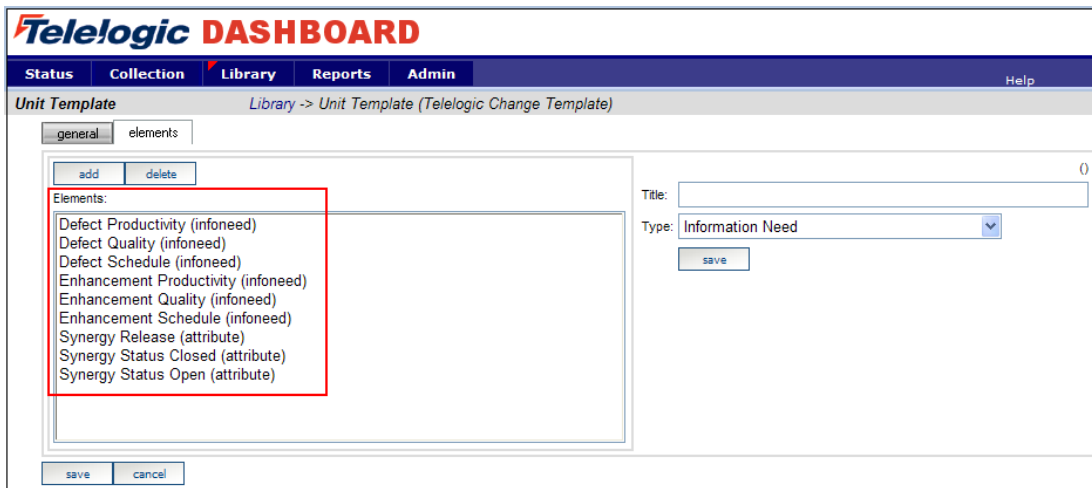
To include a schedule in a template, go to the **Library** tab. Select the **Unit Template List** from the Library section on the left hand side of the page. This will open a list of templates currently available for use.



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes Status, Collection, Library (selected), Reports, Admin, and Help. The main content area is titled "Unit Template List" and features a table of templates. A sidebar on the left contains a "Library" section with "Unit Template List" highlighted in red. The table lists various templates with their creation dates and authors.

		created on	created by	title
edit	delete	01 Jan 06	Default	CMMI Template
edit	delete	01 Jan 06	Default	DOORS Template
edit	delete	01 Jan 06	Default	Graph Type Demo Template
edit	delete	01 Jan 06	Default	Release Project Template
edit	delete	01 Jan 06	Default	Sample Unit Template
edit	delete	01 Jan 06	Default	Software Project Template
edit	delete	01 Jan 06	Default	Telelogic Change Template
edit	delete	07 Feb 07	Default	Telelogic Synergy Template

Select the **edit** button beside Telelogic Change Template. Selecting the **elements** subtab opens the page displaying the elements that have been assigned to the template.



The screenshot shows the "Unit Template" page for the "Telelogic Change Template". The page has two tabs: "general" and "elements" (selected). The "elements" tab displays a list of elements in a red-bordered box, including "Defect Productivity (infofeed)", "Defect Quality (infofeed)", "Defect Schedule (infofeed)", "Enhancement Productivity (infofeed)", "Enhancement Quality (infofeed)", "Enhancement Schedule (infofeed)", "Synergy Release (attribute)", "Synergy Status Closed (attribute)", and "Synergy Status Open (attribute)". To the right, there are input fields for "Title" and "Type" (set to "Information Need"), and a "save" button.

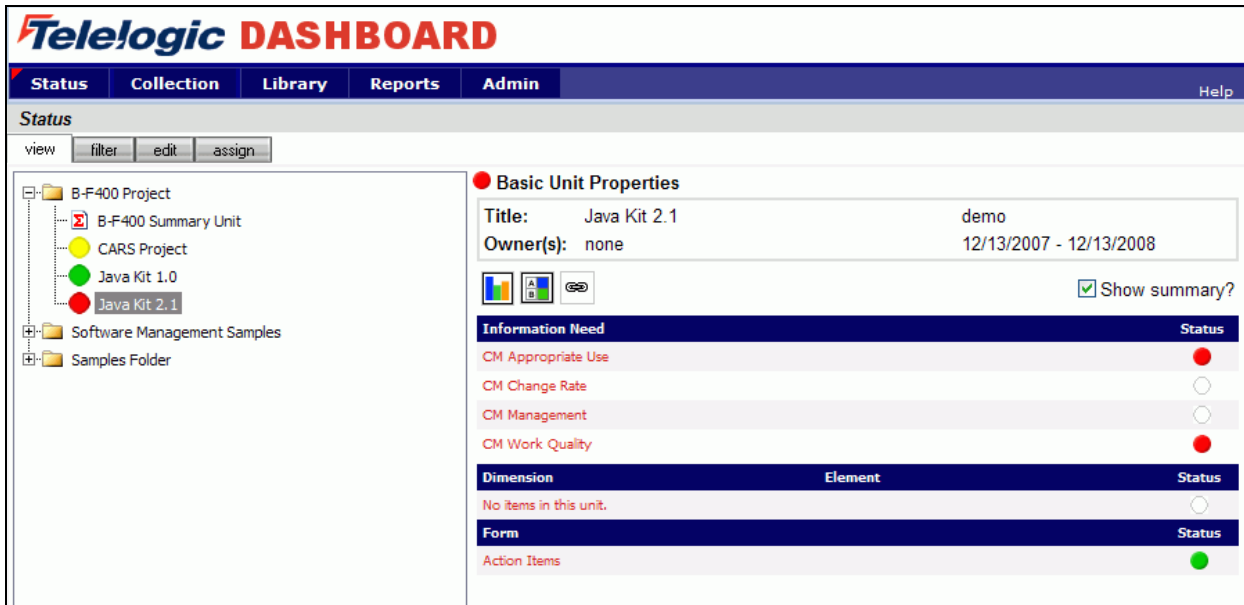
Select the **add** button and enter the **Title**. Select **Default Schedule** from the drop down list for the **Type** field and select the desired schedule from the **Schedule** drop down list.

The screenshot shows the 'Unit Template' interface in the Telelogic DASHBOARD. The navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The breadcrumb trail is 'Library -> Unit Template (Telelogic Change Template)'. The 'elements' tab is active, showing an 'add' button (highlighted in red) and a 'delete' button. Below these are 'Elements:' and a list of items: 'Defect Productivity (infofeed)', 'Defect Quality (infofeed)', 'Defect Schedule (infofeed)', 'Enhancement Productivity (infofeed)', 'Enhancement Quality (infofeed)', 'Enhancement Schedule (infofeed)', 'Weekly Schedule (schedule)', 'Synergy Release (attribute)', 'Synergy Status Closed (attribute)', and 'Synergy Status Open (attribute)'. The 'Weekly Schedule (schedule)' item is highlighted with a blue selection bar. To the right, a form contains: 'Title: Weekly Schedule', 'Type: Default Schedule' (dropdown), and 'Schedule: Weekly Schedule 2006 - 2007' (dropdown). A 'save' button is highlighted in red. At the bottom left are 'save' and 'cancel' buttons. A '(46)' indicator is visible in the top right corner of the form area.

Make sure to **save** your changes.

## Setup a unit with the Change Template

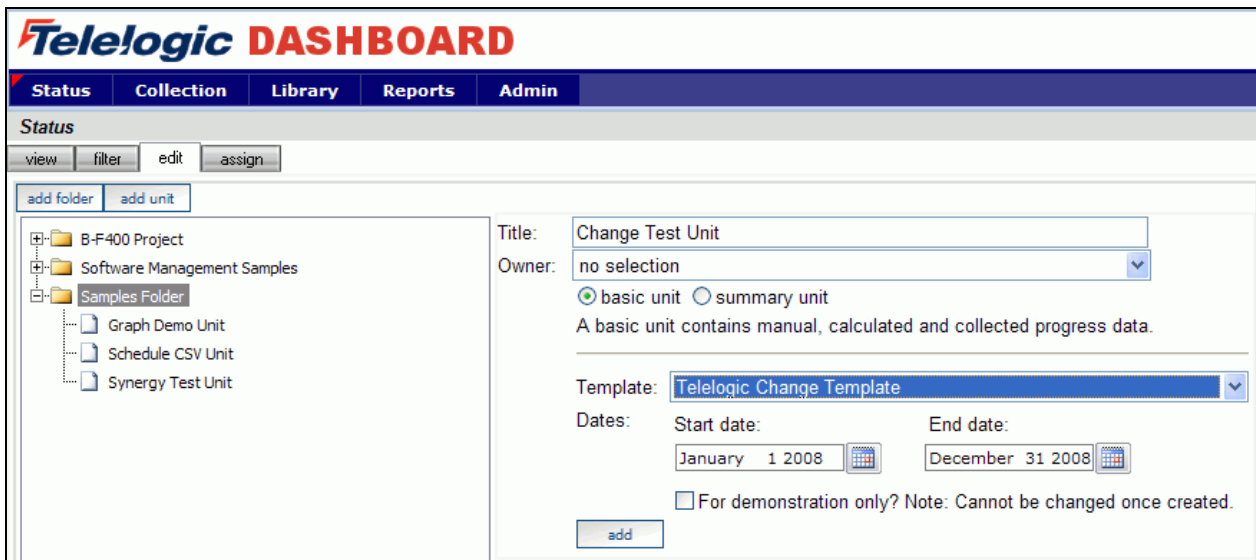
Once everything is set up correctly for the collection, the next step is to configure the Status tab to show the data results. A **unit** can be created for each project to display the data results and status for that project.



The screenshot shows the Telelogic DASHBOARD interface. The 'Status' tab is active, displaying a tree view on the left with folders like 'B-F400 Project' and 'Samples Folder'. The 'Java Kit 2.1' unit is selected. The right pane shows 'Basic Unit Properties' for 'Java Kit 2.1' with a 'demo' owner and dates from 12/13/2007 to 12/13/2008. Below this, there are sections for 'Information Need' (with status indicators for CM Appropriate Use, CM Change Rate, CM Management, and CM Work Quality), 'Dimension' (showing 'No items in this unit'), and 'Form' (showing 'Action Items').

To start, click on the **Status** tab. To add a unit, click on the **edit** subtab to organize the data tree to include information on a project or projects. Create a folder, or use an existing one, and then add a unit.

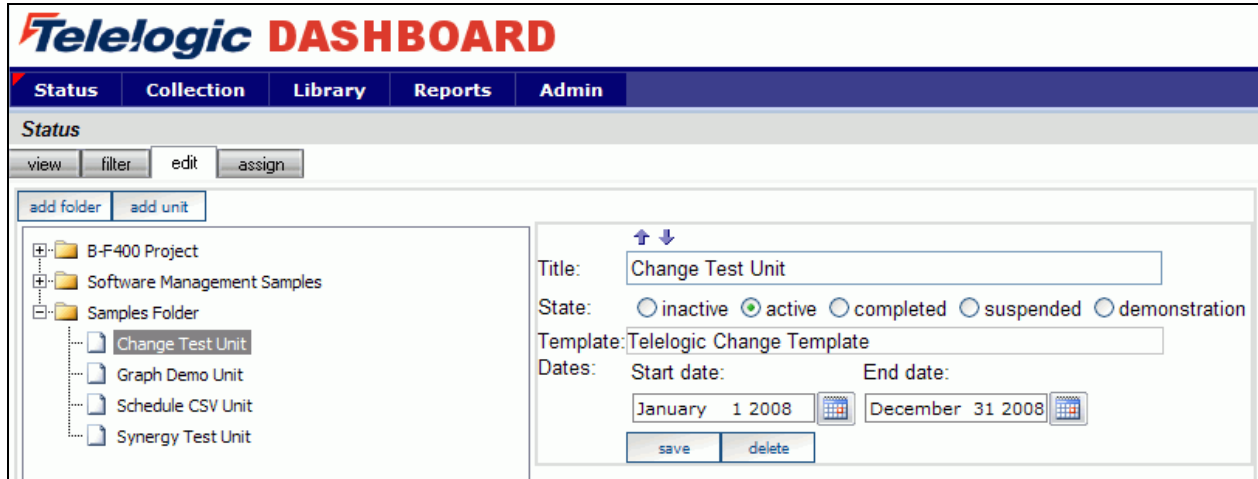
To add a unit, click the **Add Unit** button above the tree. On the right hand side of the screen, enter a **Title**, **Owner**, **Start Date** and **End date** for the Unit. Select the **Telelogic Change Template** from the drop down list. In the sample below, we added a new Unit to the Samples Folder and assigned the Telelogic Change Template.



The screenshot shows the 'Add Unit' form in the Telelogic DASHBOARD. The 'Status' tab is active, and the 'add unit' button is visible above the tree view. The tree view shows the 'Samples Folder' selected. The form fields are: Title: 'Change Test Unit'; Owner: 'no selection'; Template: 'Telelogic Change Template'; Start date: 'January 1 2008'; End date: 'December 31 2008'. There is a checkbox for 'For demonstration only?' and an 'add' button at the bottom.



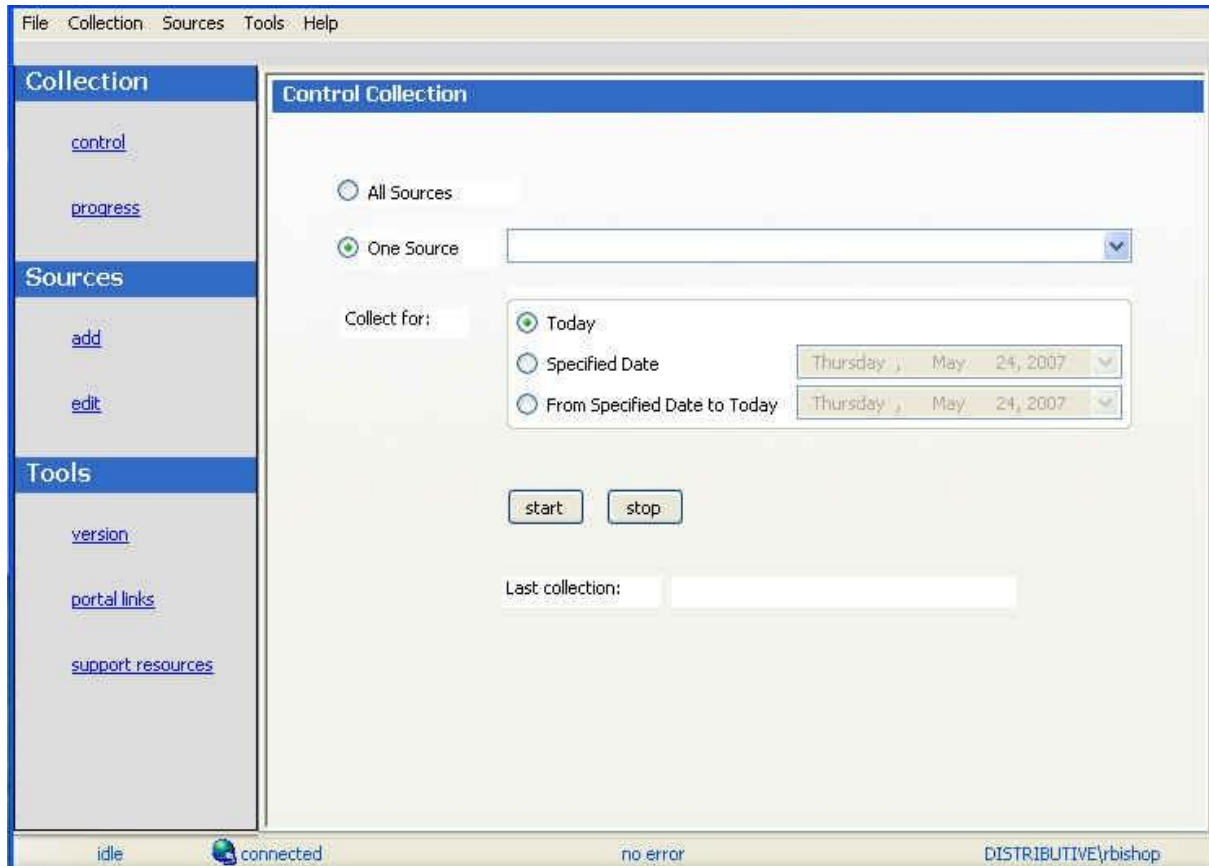
After you click the **add** button, the new unit will appear in the Status tree.



With the Portal configuration complete, you are ready to configure your Collector and collect data.

## Configuring the Collector

Open the Collector using Start > Programs > Telelogic > Dashboard > Telelogic Dashboard Collector.

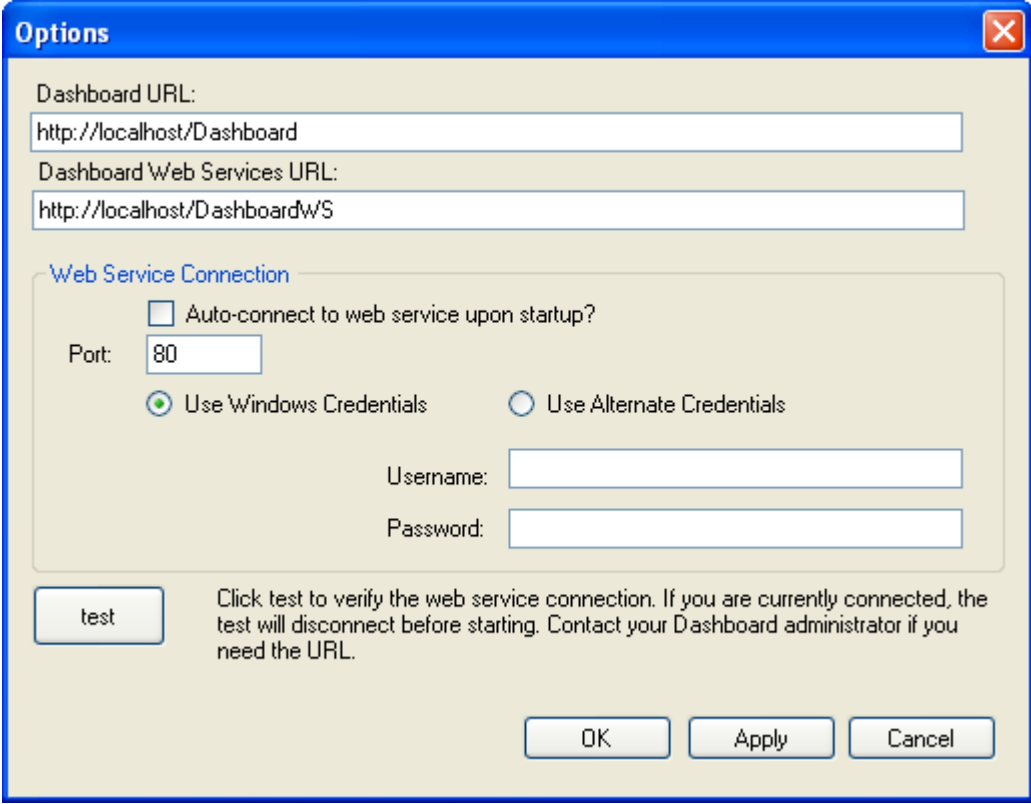


## Verify Connection to Web Services

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 Telelogic Dashboard Web Services URL is set to:

`http://localhost/DashboardWS`

If you are running the collection from the server that is running the 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 Telelogic Dashboard Portal. Be sure to click the "Apply" button if you make any changes.



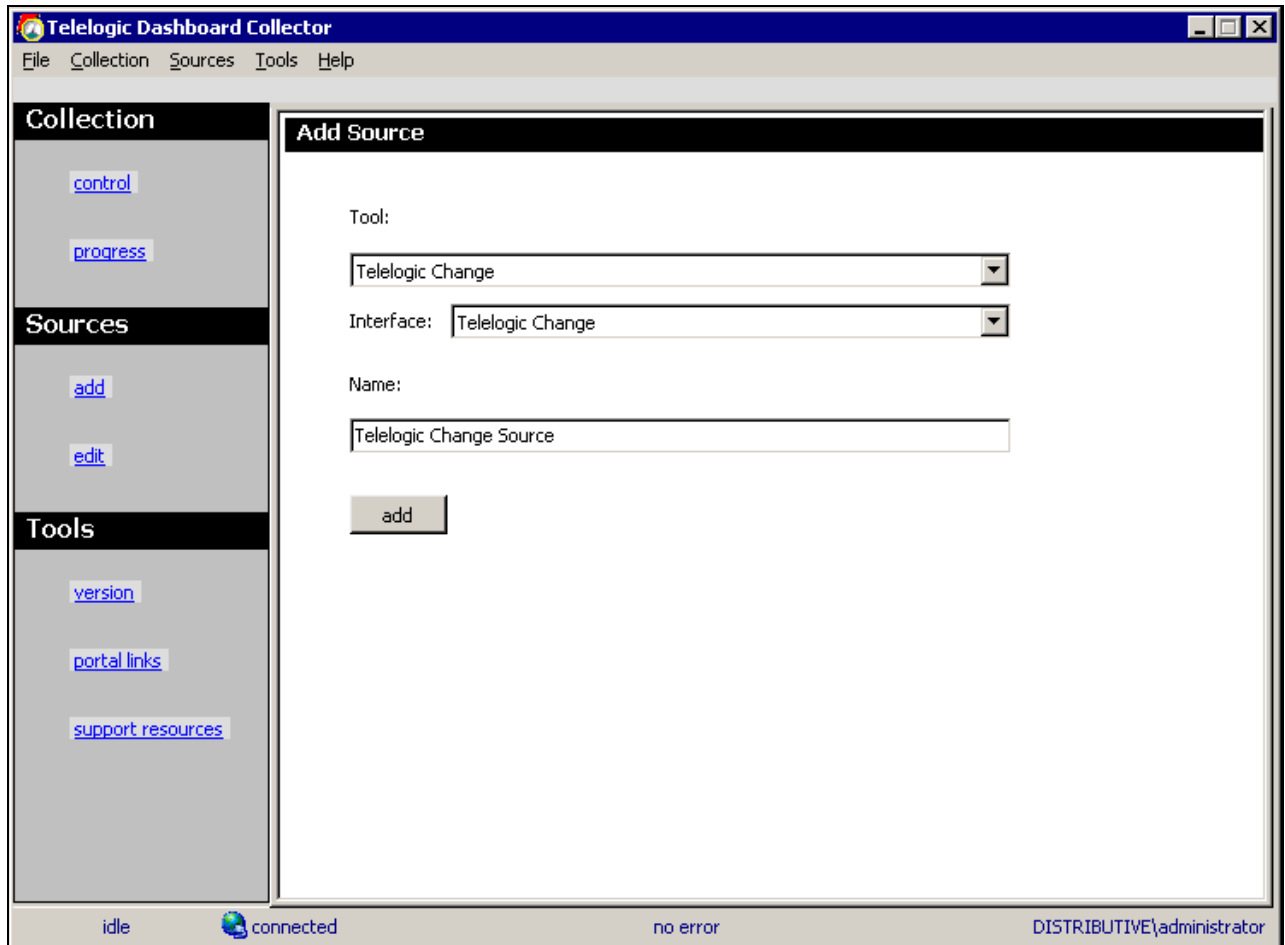
The screenshot shows a dialog box titled "Options" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Dashboard URL:** A text box containing `http://localhost/Dashboard`.
- Dashboard Web Services URL:** A text box containing `http://localhost/DashboardWS`.
- Web Service Connection:** A section with a blue header containing:
  - An unchecked checkbox labeled "Auto-connect to web service upon startup?".
  - A "Port:" label followed by a text box containing `80`.
  - Two radio buttons: "Use Windows Credentials" (which is selected) and "Use Alternate Credentials".
  - A "Username:" label followed by an empty text box.
  - A "Password:" label followed by an empty text box.
- A "test" button on the left side of the dialog.
- A paragraph of text: "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."
- Three buttons at the bottom: "OK", "Apply", and "Cancel".

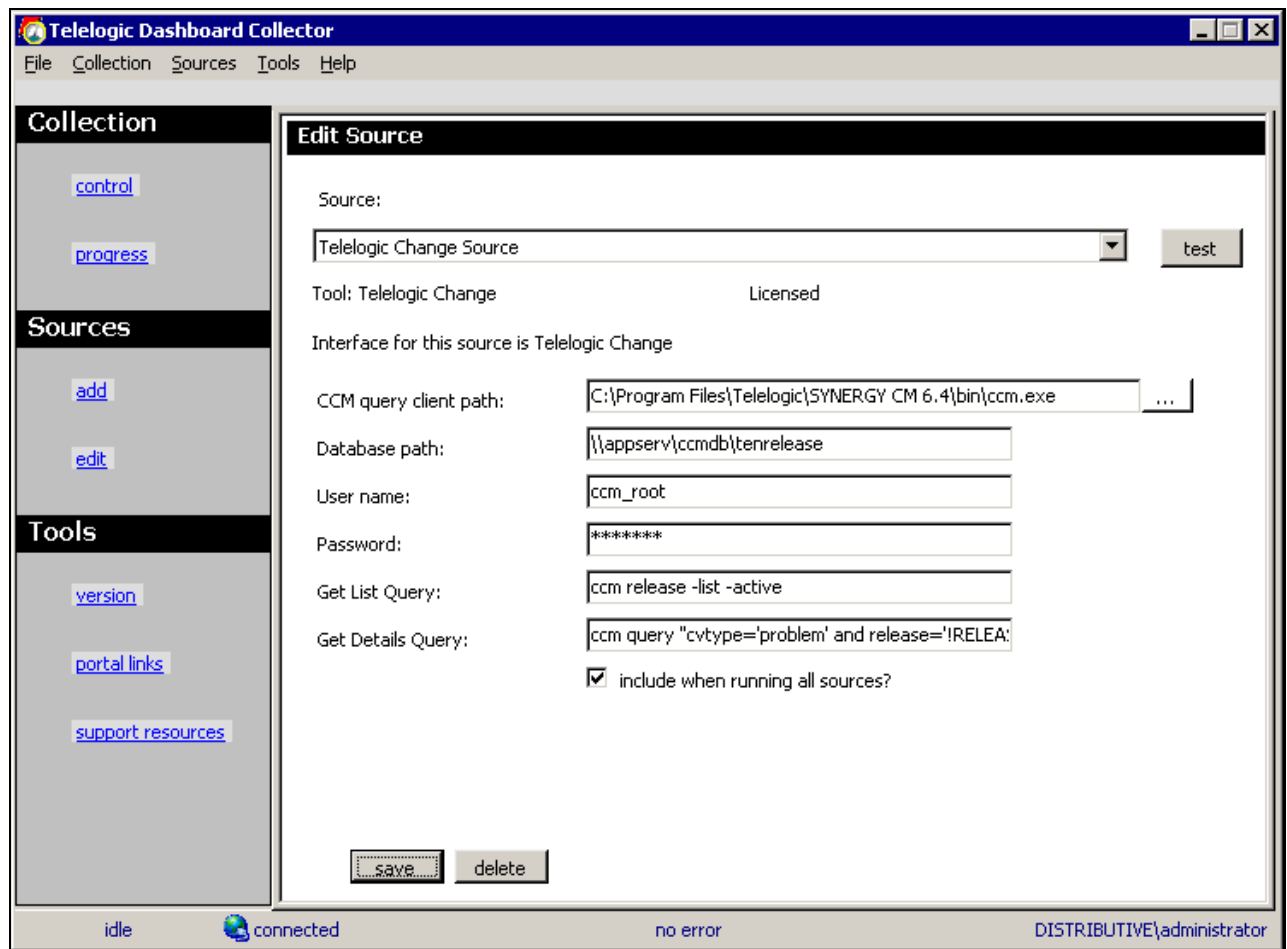
Click the test button to test the connection. If, after pressing the "test" button, you receive an error or warning message, review the message and your web services configuration to correct the problem. The web services configuration information is contained in the `web.config` in the Web Services folder.

## Add a Source

Choose **sources/add** from the left menu. Select Telelogic Change as the Tool, select the Change interface from the drop down and enter a name for your source. (You will notice a drop down list of Interfaces below the Tool selection. This is used for many sources to delineate between different instances of a tool and let the Collector know which Interface to use when collecting from a specific source.) Click the **add** button.



The setup for Telelogic Change requires some basic log in information as well as some Portal specific information.



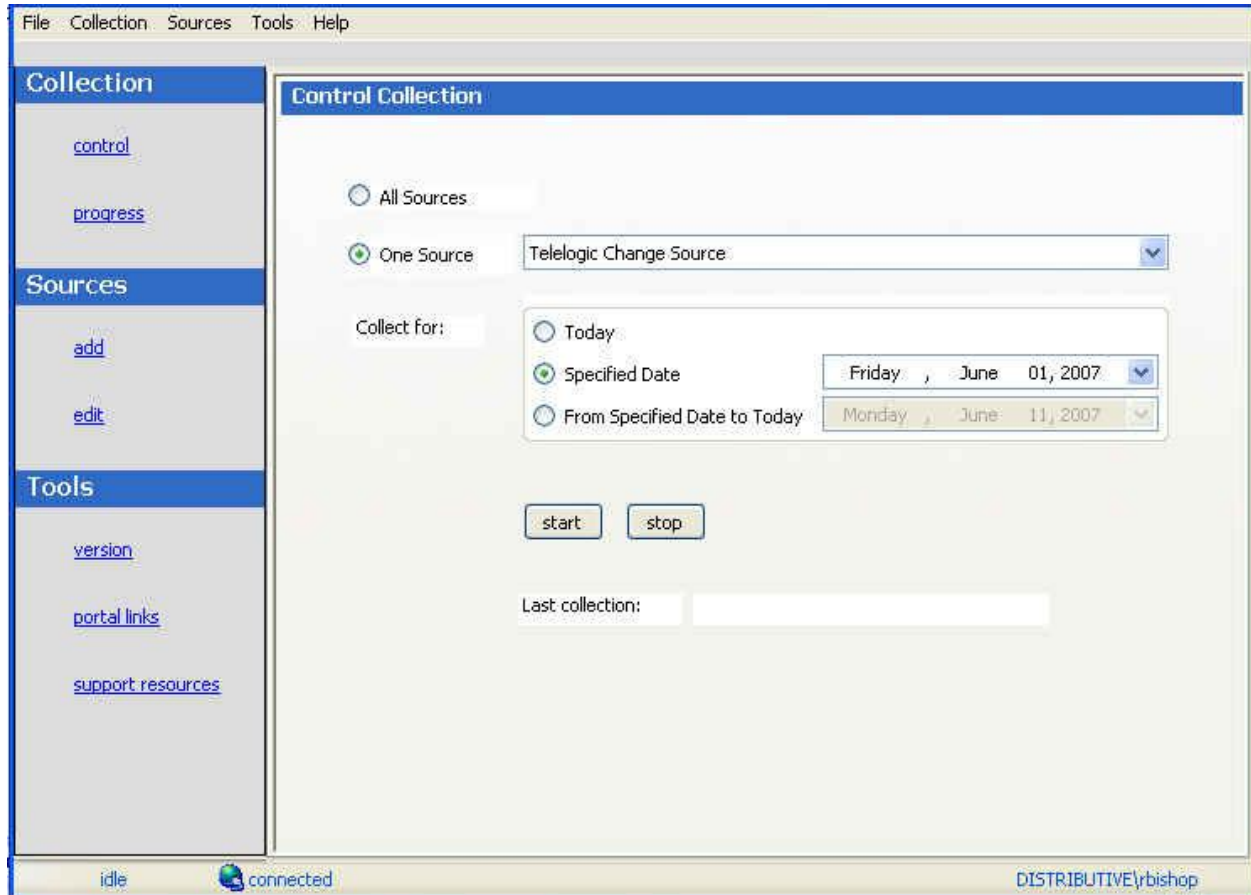
The "**Path to client**" is the location where Telelogic Change is installed on the local machine. The "**Database path**" is the location of the Telelogic Change Database. The Username and Password allows access to Change database.

The **Get List Query** will default to: `ccm release -list -active`. This query will return a list of releases. This list is then used in the Get Details Query. The **Get Details Query** will default to: `ccm query "cvtype='problem' and release='!RELEASE!' and (request_type='Defect' or request_type='Enhancement')" -f "!THEFIELDS!" -nf -u -ns`. The Get Details query will run the default query for each item reported from the Get List Query. It will return defect and enhancement information for each release that is returned in the initial query.

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

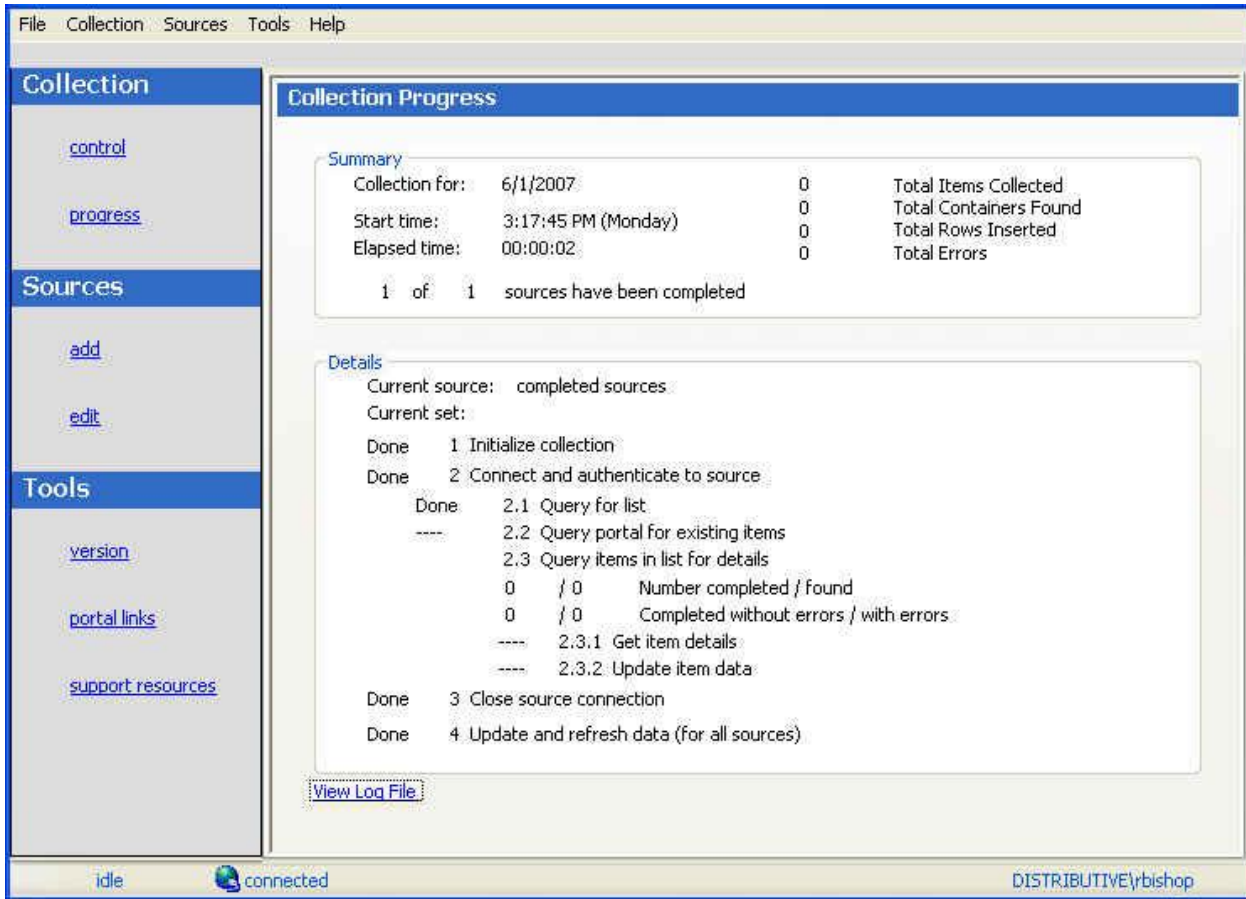
## Running a Collection

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 source from the drop down on the right. Below the drop down, select "Specified Date" and choose the last day of the previous month. This will allow you to see data in your graphs automatically. See the Help files for more information about how schedules affect the Collector.



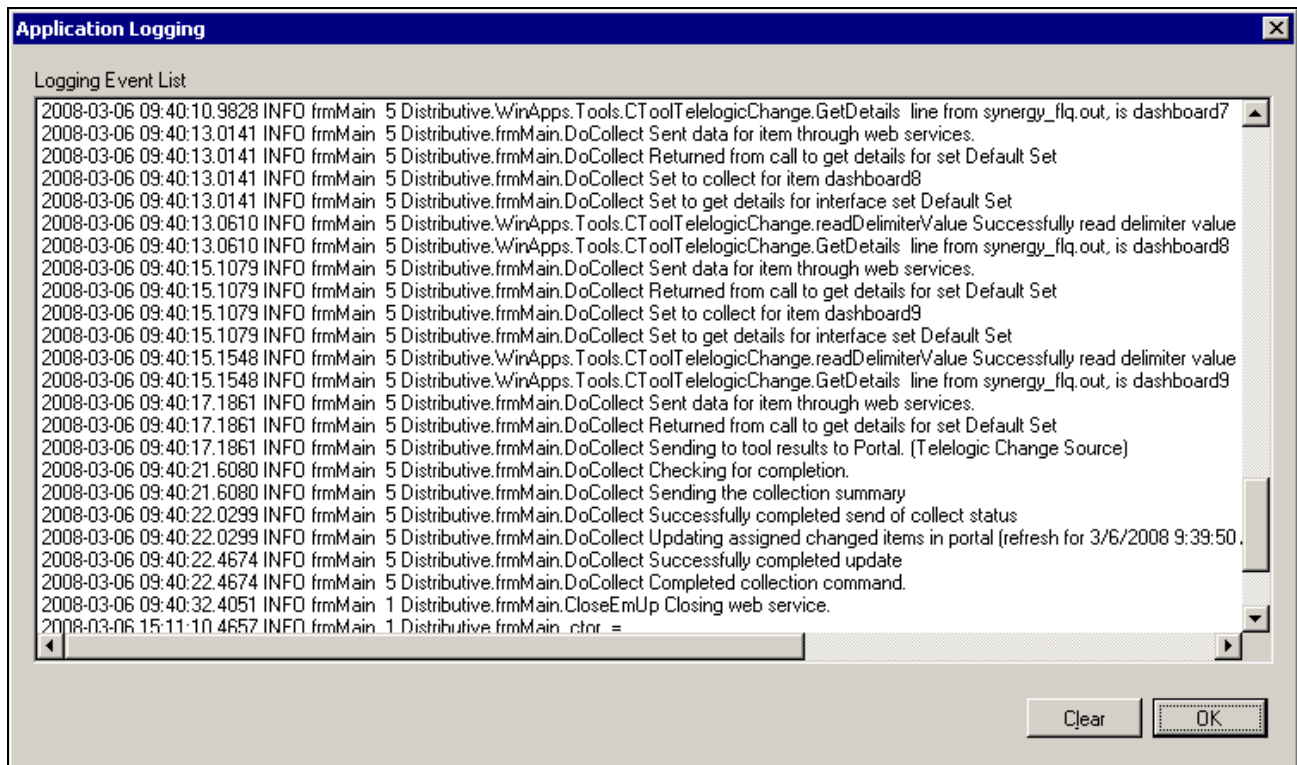
Once you've picked your source and your date, click on the **start** button.

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



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 has 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. You also might notice that the number of found items is greater than the number of items completed. This is most likely caused by finding containers (which are folders for Change), and unless there is a report of errors, everything collected correctly.



The next step is configuring the Unit.

# Configuring the Unit

## Assigning Collected Items

Once you have run your collection without errors, you are ready to add your **Items** to your **Unit**. Go back to the **Status** page and click on the **edit** subtab. Click on the Unit that 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 are 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.

The screenshot displays the Telelogic DASHBOARD interface. At the top, there is a navigation bar with tabs for Status, Collection, Library, Reports, and Admin. The 'Status' tab is active. Below the navigation bar, there are sub-tabs: 'view', 'filter', 'edit', and 'assign'. The 'edit' sub-tab is selected. On the left side, there is a tree view showing a folder structure: 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. On the right side, there are configuration options for the 'Item List'. The 'by source' sub-tab is selected. The 'Status' section has radio buttons for 'all' (selected), 'unassigned', 'assigned', and 'ignored'. The 'Collector' dropdown menu is set to 'QATEST', and the 'Interface' dropdown menu is set to 'Telelogic Change'. There are also radio buttons for 'show items' (selected) and 'show containers'. A 'show' button is located below these options. Below the configuration options, there is an 'Item List' section with 'ignore' and 'assign' buttons. The 'Item List' contains a list of items: '1.0', 'dashboard1', 'dashboard10', 'dashboard2', 'dashboard3', 'dashboard4', 'dashboard5', 'dashboard6', 'dashboard7', 'dashboard8', and 'dashboard9'. At the bottom left, there is an 'Assigned Items' section with a 'Show: all' dropdown menu and an 'unassign' button.



Click on the items that you want to add to this unit and then click on the **assign** button on the right hand side.

The screenshot shows the Telelogic DASHBOARD interface. At the top, there is a navigation bar with tabs for Status, Collection, Library, Reports, and Admin. The Status page is active, showing a sub-menu with options: view, filter, edit, and assign. On the left, a tree view displays a hierarchy: B-F400 Project, Software Management Samples, and Samples Folder. Under Samples Folder, several units are listed: Change Test Unit (highlighted), Graph Demo Unit, Schedule CSV Unit, and Synergy Test Unit. On the right, there are filter controls: 'by date' and 'by source' tabs, a 'Status' section with radio buttons for 'all' (selected), 'unassigned', 'assigned', and 'ignored', a 'Collector' dropdown set to 'QATEST', an 'Interface' dropdown set to 'Telelogic Change', and radio buttons for 'show items' (selected) and 'show containers'. A 'show' button is below these. Below the filters is an 'Item List' section with 'ignore' and 'assign' buttons. The list contains the following items: 1.0, dashboard10, dashboard2, dashboard3, dashboard4, dashboard5, dashboard6, dashboard7, dashboard8, and dashboard9. At the bottom left, there is an 'Assigned Items' section with a 'Show:' dropdown set to 'all' and an 'unassign' button. Below this, a box contains the text 'dashboard1 (item)'.

On the left hand side of the page, you will see a list of items set as **Assigned Items**. Now all you have to do is refresh the unit and you will see data in the graphs.

## Refreshing the Unit

While 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 of the page, click on the **Graph** button.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help

Status

view filter edit assign

- B-F400 Project
  - Software Management Samples
  - Samples Folder
    - Change Test Unit
    - Graph Demo Unit**
    - Schedule CSV Unit
    - Synergy Test Unit

**Basic Unit Properties**

Title: Change Test Unit active  
 Owner(s): none 1/1/2008 - 12/31/2008

Show summary?

Information Need	Status
Defect Productivity	<input type="radio"/>
Defect Quality	<input type="radio"/>
Defect Schedule	<input type="radio"/>
Enhancement Productivity	<input type="radio"/>
Enhancement Quality	<input type="radio"/>
Enhancement Schedule	<input type="radio"/>

Dimension	Element	Status
Dashboard Categories	Productivity	<input type="radio"/>
	Quality	<input type="radio"/>
	Schedule	<input type="radio"/>
Software CMMI Maturity Level 2	Process & Product Quality Assurance	<input type="radio"/>
	Project Monitoring & Control	<input type="radio"/>

In the subsequent **Unit Status** page, you will see an empty GANTT chart with your items listed along the side. From there, click on the **Unit Properties** link under the Definition section.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

Unit Status Status -> Unit Status (Change Test Unit)

GANTT View

managed items dashboard1

phases
J F M A M J J A S O N D
2008

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

Next, click on the **refresh** button in the center of the page. This will let you refresh the data for all of the Items and their graphs over a period of time.

The screenshot displays the Telelogic DASHBOARD interface. At the top, there is a navigation bar with tabs for Status, Collection, Library, Reports, Admin, and Help. Below this, the current page is identified as 'Unit Status' with a breadcrumb trail 'Status -> Unit Status (Change Test Unit)'. The main content area is titled 'Unit Definition' and contains the following fields:

- Title:** Change Test Unit
- Owner:** no selection
- State:** inactive, active (selected), completed, suspended, demonstration
- Refresh Order:** 0, with refresh and reload buttons
- Schedule:** basic schedule mode (selected), advanced schedule mode
- Progress Report:** Monthly Schedule 2006 - 2008
- Office Template:** Unit.ppt
- Dates:** Start Date: September 1 2007, End Date: December 31 2008
- Description:** (empty text area)
- URL:** [ + ] Hyperlink
- Project Stage:** (empty text field)
- Project Plan:** (empty text field)
- Site/Location:** (empty text field)
- Contract/Project No.:** (empty text field)
- Customer:** (empty text field)
- Sponsor:** (empty text field)
- Team:** (empty text field)
- Forms:**  Action Items,  Risks

A 'save' button is located at the bottom of the form.

On the Refresh page, you need to choose the dates for refreshing the graphs. Since you've run a collection for only one date, you'd only need to refresh over that date. So if, for example, you ran your collection for February 28<sup>th</sup>, you would want to refresh over that date.

In this example, the refresh runs from January 1<sup>st</sup> to March 6<sup>th</sup>, but it could be any span of dates that include February 28<sup>th</sup>.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin

**Refresh** Status -> Unit Status (Change Test Unit) -> Refresh Data

Selected Unit Change Test Unit

Refresh series with measures for the following date range:

start: January 1 2008

end: March 6 2008

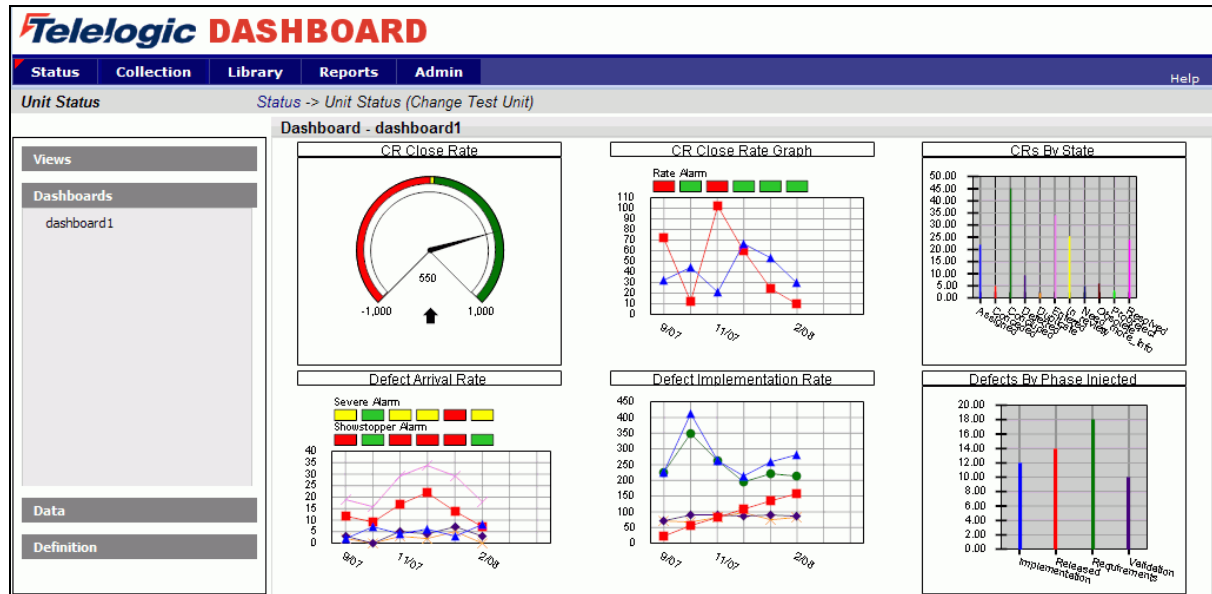
refresh cancel

Status: save

After you've selected your dates, click the **refresh** button. The Status box below will tell you when the refresh has completed. To get back to your unit use the bread crumbs or the **cancel** button. The **save** button will create a log file with the information in the Status box. This is useful if there were errors during a refresh.

## 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.



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