

***Telelogic Dashboard
Excel 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 Excel 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.

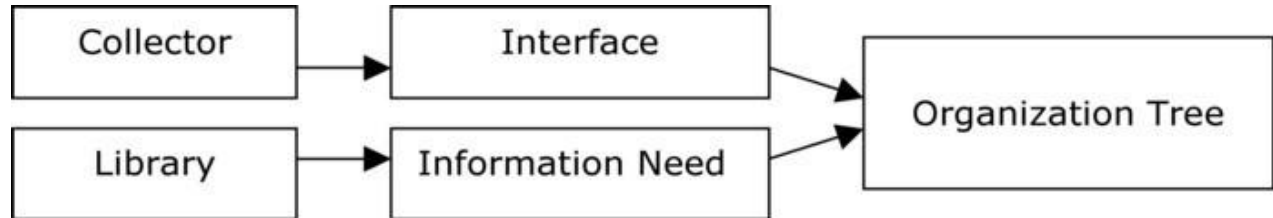
Telelogic Dashboard spans the gap between the management process desired and the one currently in place. Focus on managing by exception using Telelogic Dashboard alerts, analysis, graphical displays and drillable views that provide all the information needed to make well-informed decisions quickly. Using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

Excel Sample Walkthrough

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

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

- Structure Microsoft Excel file
- PORTAL:
 - a. Create an Interface in the Portal
 - b. Examine/Configure an Information Need
 - c. Setup a Unit with Information Needs (or use a template)
- COLLECTOR
 - a. Configure the Collector
 - b. Run a collection
 - c. Check/Resolve any collection errors/problems
- PORTAL
 - a. Check for collected items in the Portal and assign them to Units
 - b. Assign schedules to Items
 - c. View collected data graphs in the Portal

Formatting the Microsoft Excel File

The Portal requires that one of two formats be applied to the Microsoft Excel file. The first format, Vertical, is the most commonly used with Microsoft Excel files. The format requires that the first row of the file be the 'column' headers. An example of a Vertical setup is below:

	A	B	C	D	E	F
1	Date	Planned	Actual	Major Items	Minor Items	Reviewer
2	1/1/2003					
3	2/1/2003					
4	3/1/2003					
5	4/1/2003					
6	5/1/2003					
7	6/1/2003					
8	7/1/2003					
9	8/1/2003					
10	9/1/2003					
11	10/1/2003					
12	11/1/2003					
13	12/1/2003					
14						

Each consecutive line should have data that lines up to the fields in the header and be on a line by itself.

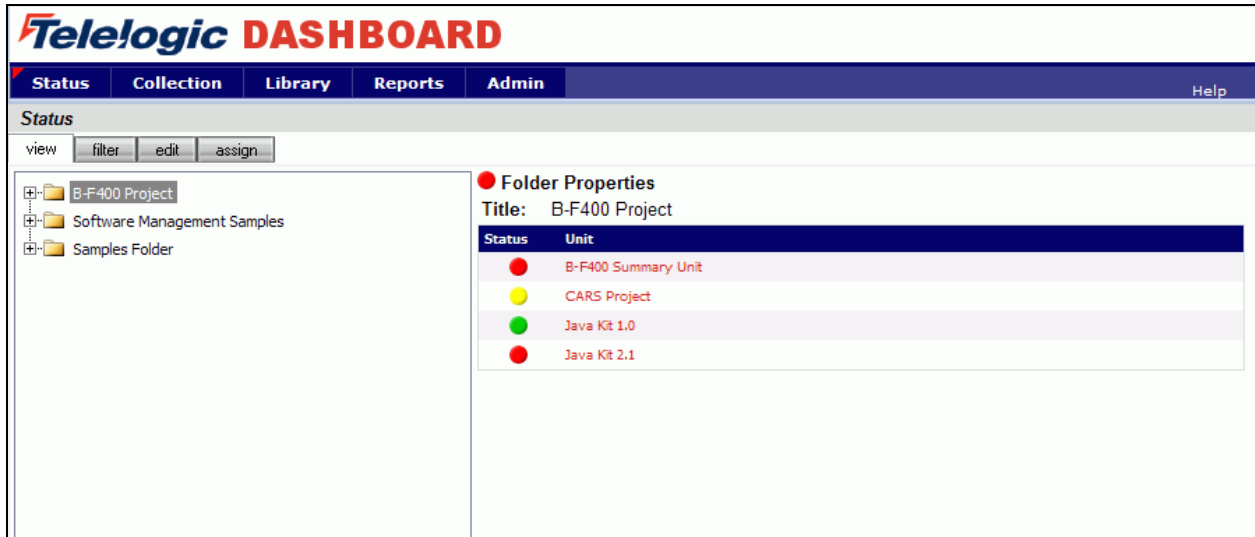
The second format that can be used for Microsoft Excel files is Horizontal. This format requires that the first column of the file be the headers. An example of this format is below:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Date	1/1/2003	2/1/2003	3/1/2003	4/1/2003	5/1/2003	6/1/2003	7/1/2003	8/1/2003	9/1/2003	10/1/2003	11/1/2003	12/1/2003
2	Planned												
3	Actual												
4	Major Items												
5	Minor Items												
6	Reviewer												
7													

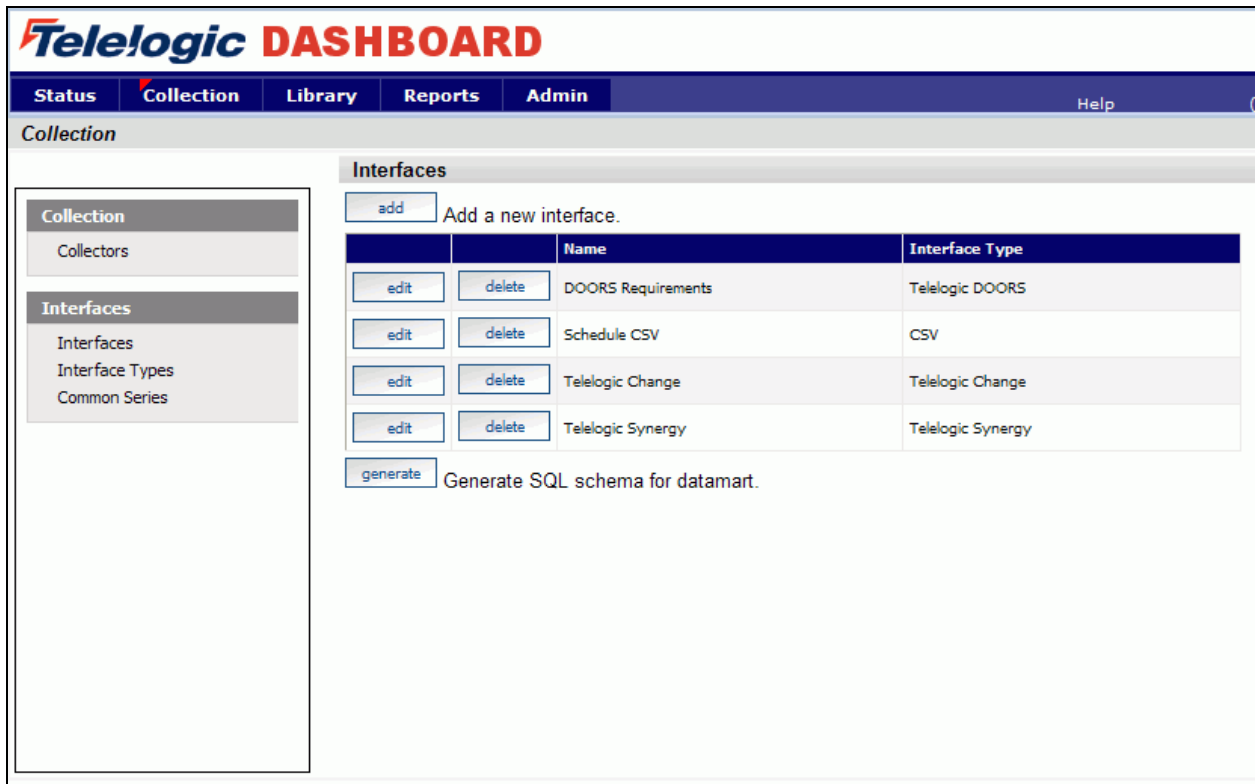
Once your Microsoft Excel file is setup correctly, you are ready to move on to configuring the portal and setting up an Interface.

Configuring the Portal

Creating the Interface in the Portal



Before collecting data from the Microsoft Excel file, you will need to create a unique Microsoft Excel Interface in the Collection tab of the Portal. The Status page is the default page that appears when the Portal is opened. Click on the **Collection** tab, and then click on the **Interfaces** link on the left hand side.



From the Interfaces List, click on the **add** button.

This will create a new **Interface**. The Interface stores all of the information pertaining to what data is being collected and where it is being saved for that data source.

The screenshot shows the 'Telelogic DASHBOARD' interface. At the top, there are navigation tabs: Status, Collection, Library, Reports, Admin, and Help. Below this is a header for 'Edit Interface' with a breadcrumb 'Collection -> Edit Interface (New Interface 3/28/2008 3-23-00 PM)'. The main form has three subtabs: 'general', 'fields', and 'queries'. The 'general' subtab is selected. The form contains the following fields and options:

- Name:** Text input field containing 'Vertical Excel File' with a character count '(15)'.
- Interface Type:** Dropdown menu with 'MS EXCEL' selected.
- Description:** Text area with a vertical scrollbar.
- Type Identifier:** Text input field.
- Database:** Dropdown menu with 'Transform Database' selected.
- Copy:** Text input field with 'no selection' selected. Below it is a red link: 'Copy Field Sets and Queries'.

At the bottom of the form, there are two buttons: 'save' and 'cancel'. To the right of these buttons are two checked checkboxes:

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

On the **general** subtab, enter a **Name** for the Interface. In this example, we'll call it Vertical Excel File. Select 'MS EXCEL' from the dropdown list for the **Interface Type** field. For Microsoft Excel files, the **Description** and **Type Identifier** are optional fields which will not affect the collection. For the **Database** field, select the database where the data should be stored. This is usually the Transform Database.

Setting Up Fields

The Collector uses the information found in the **fields** subtab of the interface to determine what data to collect from the data source.

Open the newly created Vertical Excel File Interface and click on 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 and will not be used with Microsoft Excel files.) The Default set should be used, but can be renamed (using the **Title** field) if desired.

In the **Database Table** field, enter the name of the table in the database where data will be stored. For this example, we'll use the table name 'Inspections'. (The table will automatically be created in the database when the Interface is stored.)

The **Parameter Replacement Tag** is mainly used with database type sources and will not be used with Microsoft Excel files.

Select the **Apply** button located beneath the Parameter Replacement Tag field to save the information for this section.

The screenshot shows the 'Telelogic DASHBOARD' interface. The main navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The current page is 'Edit Interface' for a 'Collection' (Vertical Excel File). The interface is divided into several sections:

- List of Sets:** A dropdown menu shows 'Default Set'. Below it is an 'add' button. The 'Title' field contains 'Default Set' and the 'Database Table' field contains 'Inspections'.
- Fields in Selected Set:** A list of fields from an Excel file: 'A - InspDate (date)', 'B - InspNum (integer)', 'C - PagesReviewed (integer)', 'D - PrepHours (integer)', 'E - PeopleInvolved (integer)', and 'F - MajorDefects (integer)'. An 'add' button is above the list.
- Selected Field Properties:** A section for configuring field 'A'. It includes a checkbox 'Do not collect from source?' (unchecked), a 'Source Attribute' field with 'A', a 'Table Field' field with 'Priority', a 'Type' dropdown set to 'Text 25', and a 'Value' section with radio buttons for 'Allow null - default optional' (selected) and 'Don't allow null - default required'. A 'default value' field is empty. 'apply' and 'delete' buttons are at the bottom.
- Parameter Replacement Tag:** A field with a '+' icon and a list box, currently empty. 'apply' and 'delete' buttons are below it.
- Bottom:** 'save' and 'cancel' buttons, and two checked checkboxes: 'Add (new) table fields during save?' and 'Update or delete table fields during save?'.

On the right hand side, select the **Add** button to create a column from the Microsoft Excel file to be collected by the Portal. For Microsoft Excel files, letters (vertical setup) or numbers (horizontal setup) should be added as fields based on the setup of the Microsoft Excel file to be collected. In this example, the Microsoft Excel file is setup as a Vertical Excel file so letters will be used. After selecting the Add button, change the **Source Attribute** field to 'A'. (This is the name of the field in the source.)

In the **Table Field**, enter InspDate. (This will be the name of the field in the database table where the data is stored.) The only requirements for the Table Field are that it be unique for this table and that it follows SQL Server naming conventions.

The **Type** field determines what kind of data can be entered into the database field. Make sure that the type chosen here is equivalent to the Source type. For this example, select Date.

The selection for the **Value** field determines whether the database field allows null values or not. If the 'Don't allow null' option is selected a default value of the type selected must be entered in the default value field. For this example, select the 'Allow Null' option.

Select the **Apply** button to save information in this section.

After the fields have been created, the **Table Field** name cannot be modified through the interface. Once the addition of all of the fields from the Microsoft Excel file has been completed, the next step is to write queries for the 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 display the information that is desired. This is done through SQL queries, with the help of the **Query Builder**. Most of the queries can be built with little or no knowledge of SQL, though some cursory knowledge would be helpful for troubleshooting.

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 the same basic query will be used with a single difference. For example, if you wanted a graph that would display Defects by Priority, but were not sure how many different priorities were being used, you could use the multiple series to first retrieve the different priorities, use those priorities 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 large number of them, you could use the multiple series query for the same use.

The screenshot shows the 'Telelogic DASHBOARD' interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The current page is 'Edit Interface' for 'Collection -> Edit Interface (Vertical Excel File)'. The 'queries' tab is selected. There are two 'add' buttons: one for 'Add a new single series query to this interface ...' and another for 'Add a new multiple series query to this interface ...'. At the bottom, there are 'save' and 'cancel' buttons, and two checked checkboxes: 'Add (new) table fields during save?' and 'Update or delete table fields during save?'.

In this example, we will create a **single series** query. Click the **add** button for the single series query. You will see the new query created below.

The screenshot shows the same 'Telelogic DASHBOARD' interface. The 'queries' tab is still selected. The 'add' buttons are still present. A new table has been added below the buttons, showing the details of the newly created query:

Name	Type
New Query 3/28/2008 3:33:38 PM	SingleSeries

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

Click on the **edit** button for the query. Give your query a name that will be meaningful when used later.

Notice below the **title** of this query that there is a drop down of **Common Series**. The Common Series is the link between an interface and a series on a graph. Select the one that most closely matches the query that is running. If there is not a Common Series that matches, a new one will need to be created.

The screenshot shows the 'Telelogic DASHBOARD' interface. At the top, there are navigation tabs: 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. Below this is a breadcrumb trail: 'Collection -> Edit Interface (Vertical Excel File) -> Edit Query'. The main form is titled 'Edit Query' and contains the following fields and controls:

- Title:** A text input field containing 'Excel Query'.
- Common Series:** A dropdown menu with 'SL - Total Tasks' selected.
- Query Builder:** A set of three buttons: 'Query Builder', 'Query Edit' (active), and 'Test Query'.
- 1 Data from:** A dropdown menu with 'Inspections database table' selected.
- 2 Result is:** Two radio buttons: 'a count of' (selected) and 'a sum of'. A dropdown menu next to 'a sum of' contains 'InspDate (Default Set)'.
- 3 Filters are:** Two checkboxes: 'the current item' (checked) and 'for the current period' (checked).
- 4 With terms:** A large empty text area with a 'delete' button to its right.
- Add new query term:** A section with a dropdown menu containing 'InspDate (Default Set)', an equals sign, and another dropdown menu.
- Buttons:** 'add', 'Start Date' (dropdown), and 'insert' buttons are located below the 'Add new query term' section. 'save' and 'cancel' buttons are at the bottom left.

For this example, add a query for Total Tasks. For the Common Series, use the "SL – Total Tasks" which is a query that is used with the default Schedule Loading Information Need. For this query, the necessary information is a count per period of all of the tasks in the file, but only for this one file. To get this, click on 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). Usually the check boxes for the current item and current period should be checked.

Once the parameters have been selected, this specific query is complete. Select the **Save** button, to save the information for this Interface. 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, please refer to the help files.

Creating an Information Need

When 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

On the **Library** tab, click on the **Information Need List** link on the left hand side. From here, click on the **add** button above the list. On the **general** subtab, enter a name for the information need in the **Title** field and choose a **State** for the Information Need.

Telelogic DASHBOARD

Status Collection **Library** Reports Admin Help

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

general reference guidance graphs dimensions

Title: Default Schedule Information (77)

State: draft defined active retired

May be exported to other sites?

Keywords:

Description:

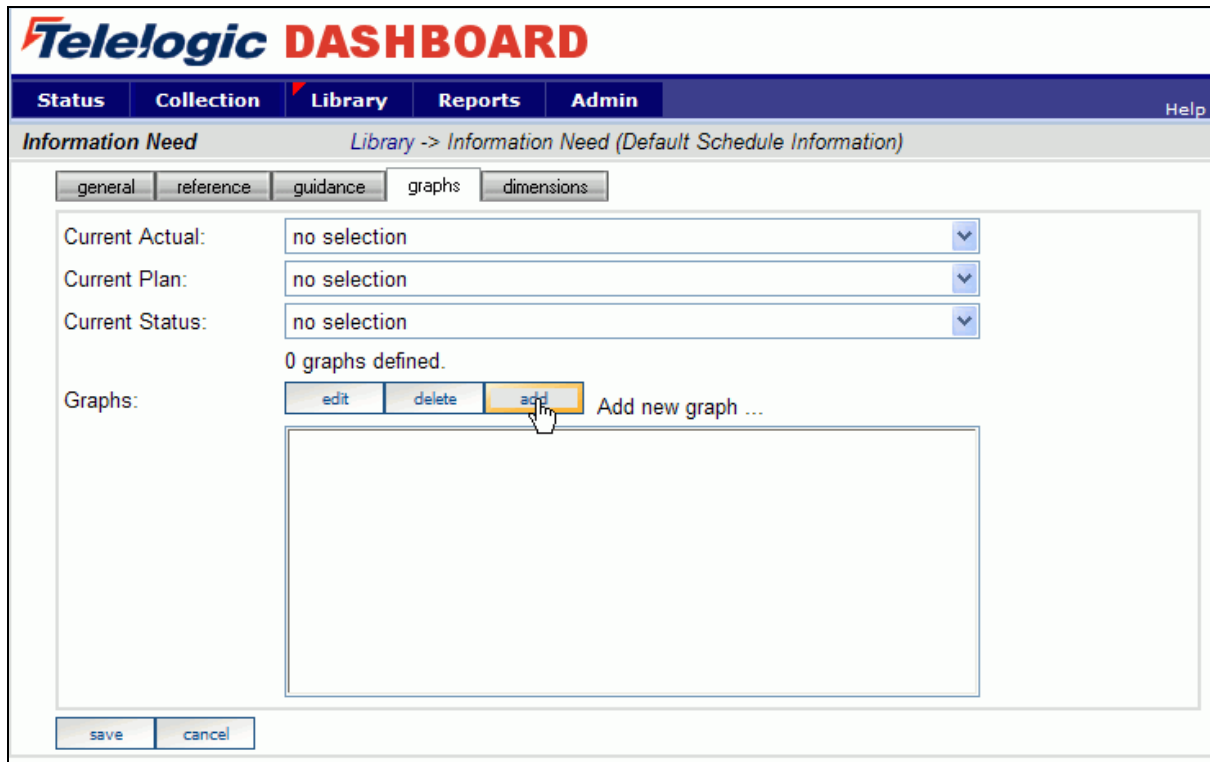
Created on 3/28/2008 Created by Updated on: 3/28/2008

save cancel

All other information on the **general** subtab is optional. Additionally, the information on the **reference** and **guidance** tabs is for use within your company. These tabs are generally used to convey information about an internal metrics plan, or ways to utilize best practices that have been collected during prior review processes. **Save** the Information Need and then reopen it by selecting the **Edit** button. (This is done as a precaution so that no data is lost when creating a graph.)

Adding a Graph to the Information Need

Within the Information Need, graphs will be added that are all related to the information area associated with the Information Need. For this example, only a single graph will be added, but as many graphs as necessary can be added to the information need.



Click on the **graphs** subtab of the Information Need. To create the graph, click on the **add** button. The drop downs above the buttons will be addressed later.

All of the basic information about the graph is set on the **graph definition** subtab. Enter a name for the graph in the Title field. The **description** is optional and may be left blank. The **Type** of graph is chosen from a drop down. For this example, select run graph from the drop down menu. For more information on graph types, please refer to the help files.

The screenshot shows the 'Telelogic DASHBOARD' interface. The navigation bar includes 'Status', 'Collection', 'Library' (selected), 'Reports', and 'Admin'. The breadcrumb trail is 'Library Graph -> Information Need (Default Schedule Information) -> Graph (New graph 3/6/2008 4-48-25 PM)'. The form has two tabs: 'graph' (selected) and 'series'. The 'graph' tab contains the following fields:

- Title:** A text input field containing 'Total Tasks' with a character count '(305)' and a plus icon.
- Description:** A large, empty text area.
- Type:** A dropdown menu set to 'Run Graph'.
- Frequency:** Radio buttons for 'Schedule-driven' (selected), 'Event-driven', and 'Do not propagate to unit?'. A dropdown menu next to 'Schedule-driven' shows 'no selection'.
- Status:** Radio buttons for 'Worst-case of all alarms' (selected), 'Single alarm series', and 'None'. A dropdown menu next to 'Single alarm series' is empty.

At the bottom of the form are 'save' and 'cancel' buttons.

The next option is to choose a **Frequency**, either schedule driven or event driven. The difference between the two is that an event driven graph does not have a pre-defined and consistent schedule. Examples of event driven frequencies might be software releases or peer reviews. Schedule based graphs are based on a static and consistent schedule, such as a daily, weekly, or monthly data collection. If no selection is chosen here, the graph will default to the same schedule as the Item to which it is assigned. This is the option chosen for this example.

Finally, there is the **Status** driving option. A change would only be necessary in this area if more than one alarm existed on the graph or if you did not want the status from this particular graph to affect the status of the Information Need as a whole. For this example, leave the default of using the worst-case of all alarms selected. Once these changes have been made, you can save, but it is not necessary.

Next, add series by selecting the **series** subtab. This is where the information that will be displayed on the graph will be entered and/or selected. The graph for this example is very basic and will include three series: Actual, Plan, and an Alarm.

The screenshot shows the Telelogic DASHBOARD interface. At the top, there is a navigation bar with tabs for 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. Below this, the 'Library Graph' section is active, showing a breadcrumb trail: 'Library -> Information Need (Default Schedule Information) -> Graph (Total Tasks)'. There are two tabs: 'graph' and 'series', with 'series' selected. Below the tabs are 'add' and 'delete' buttons. A list on the left shows 'Actual Tasks (actual data)'. The main form has fields for 'Title' (Actual Tasks), 'Type' (Data selected), 'Duration' (Actual selected), 'Use' (Normal selected), 'Source' (single series query selected with 'SL - Total Tasks' chosen), and 'Sample Data' (no selection). There are 'save' and 'cancel' buttons at the bottom.

To create the series, click on the **add** button. On the right hand side, you will see the series definition. Name the series 'Actual Tasks' using the **Title** field.

This series is a Data **Type** series, and is an actual **duration**. (This means that it should only show data from a given date, backwards.) It is a normal **use** series.

For the **source**, use the single series query that was created earlier in the Interface. Remember that this drop down is of the list of Common Series, so look for and choose the Common Series that was used before, "SL – Total Tasks", from the drop down menu. Also, make sure that the Single Series query radio button is selected.

Save the series by selecting the **save** button located under the Sample Data field.

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 a normal **use** series. Select manual for the **source**. Click the **save** button as before to save the series.

The screenshot shows the 'Telelogic DASHBOARD' interface. The navigation bar includes 'Status', 'Collection', 'Library' (selected), 'Reports', and 'Admin'. The breadcrumb trail is 'Library -> Information Need (Default Schedule Information) -> Graph (Total Tasks)'. The page title is 'Library Graph'. There are 'graph' and 'series' tabs, with 'series' selected. Below the tabs are 'add' and 'delete' buttons. A list on the left shows 'Actual Tasks (actual data)' and 'Planned Tasks (plan data)'. The main configuration area for 'Planned Tasks' includes:

- 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 (with 'edit equation' link)
- Sample Data: no selection

 At the bottom are 'save' and 'cancel' buttons.

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 all series have been created, save the graph.

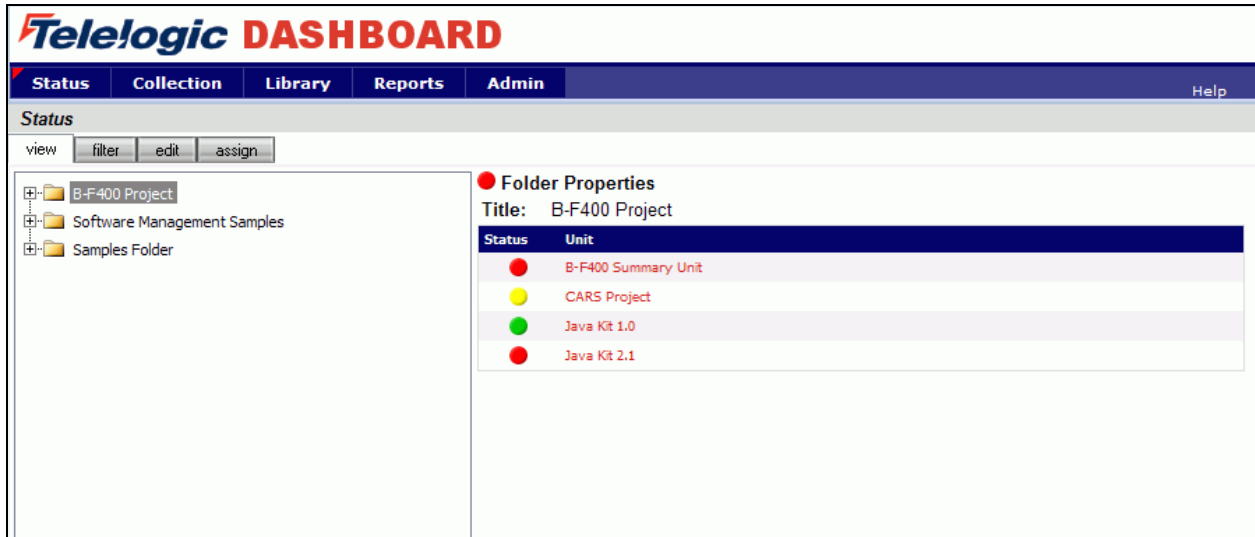
The final step is to set the Information Need status drivers, which are the drop downs on the graphs tab. These three areas drive the color status for the Information Need on the Status page. In this case, set the 'Actual Tasks' series as the **Current Actual** value, the 'Planned Tasks' as the **Current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

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 is the page title 'Information Need' and a breadcrumb 'Library -> Information Need (Default Schedule Information)'. There are five tabs: 'general', 'reference', 'guidance', 'graphs' (selected), and 'dimensions'. The 'graphs' tab contains three dropdown menus: 'Current Actual' set to 'Total Tasks\Actual Tasks', 'Current Plan' set to 'Total Tasks\Planned Tasks', and 'Current Status' set to 'Total Tasks\Total Tasks'. Below these is the text '1 graphs defined.' and a 'Graphs:' section with 'edit', 'delete', and 'add' buttons, and a link 'Add new graph ...'. A list box shows 'Total Tasks (Run)'. At the bottom are 'save' and 'cancel' buttons.

Save the changes to the Information Need.

Setup a Unit

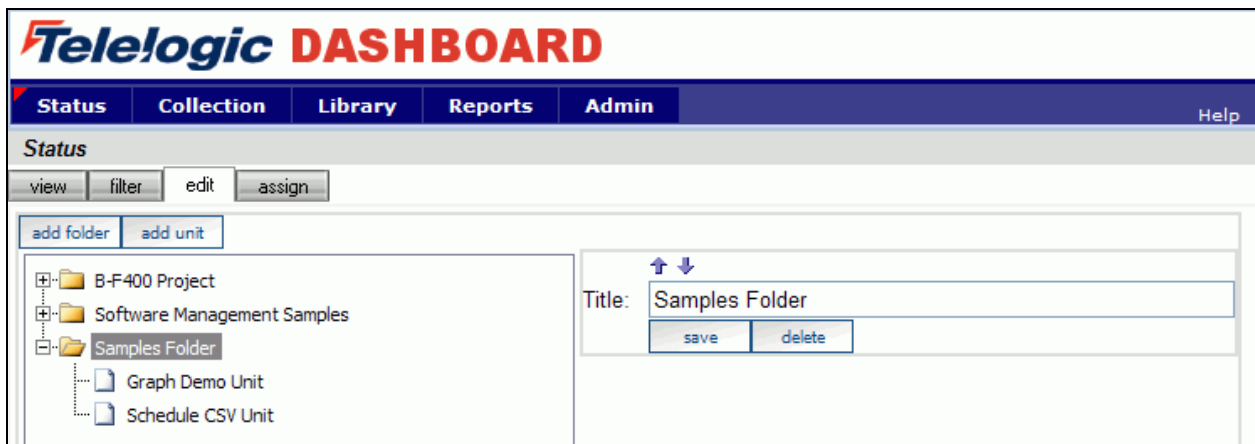
Once you have verified that everything is setup correctly for the collection, you can get the Status tab ready to show your data results. You do this by setting up a **Unit**.



The screenshot shows the Telelogic DASHBOARD interface. The 'Status' tab is selected, and the 'edit' subtab is active. On the left, a tree view shows folders: 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. On the right, the 'Folder Properties' panel is open for 'B-F400 Project', displaying a table of units:

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

Select the **Status** tab. To add a unit, click on the **edit** subtab. This is where the data tree gets organized. Create a folder, or use an existing one, and then add a unit by selecting the **add unit** button.



The screenshot shows the Telelogic DASHBOARD interface. The 'Status' tab is selected, and the 'edit' subtab is active. On the left, a tree view shows folders: 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. The 'Samples Folder' is selected, and two units are listed: 'Graph Demo Unit' and 'Schedule CSV Unit'. On the right, the 'add unit' dialog is open, showing a 'Title' field with the value 'Samples Folder' and 'save' and 'delete' buttons.

On the right hand side, you will see information about the Unit that is being 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. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The 'Status' section is active, showing a tree view on the left with folders like 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. The main area contains a form for adding a unit. The form fields are: Title: 'Schedule Excel Unit'; Owner: 'no selection'; Template: 'no selection'; Dates: Start date 'January 1 2008' and End date 'December 31 2008'. There are radio buttons for 'basic unit' (selected) and 'summary unit'. A checkbox for 'For demonstration only?' is present with a note: 'Note: Cannot be changed once created.' The 'add' button is highlighted with a mouse cursor.

At this point, you are 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 a schedule for the unit from the drop down list and enter a **Start Date** and **End Date** for the schedule. Remember to save any changes to the schedule by selecting the **Save** button.

The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes Status, Collection, Library, Reports, Admin, and Help. The current page is 'Unit Status' for 'Schedule Excel Unit'. The 'Unit Definition' section is active, showing the following fields:

- Title: Schedule Excel Unit
- Owner: no selection
- State: inactive active completed suspended demonstration
- Refresh Order: 0 (with refresh and reload buttons)
- Schedule: basic schedule mode advanced schedule mode; dropdown menu: Monthly Schedule 2006 - 2008
- Progress Report: no selection
- Office Template: no selection
- Dates: Start Date: January 1 2006; End Date: December 31 2008
- Description: (empty text area)

At this point, it is time to configure the Collector.

Configuring the Collector

Open the Collector by selecting Start > Programs > Telelogic > Dashboard > Dashboard Collector.

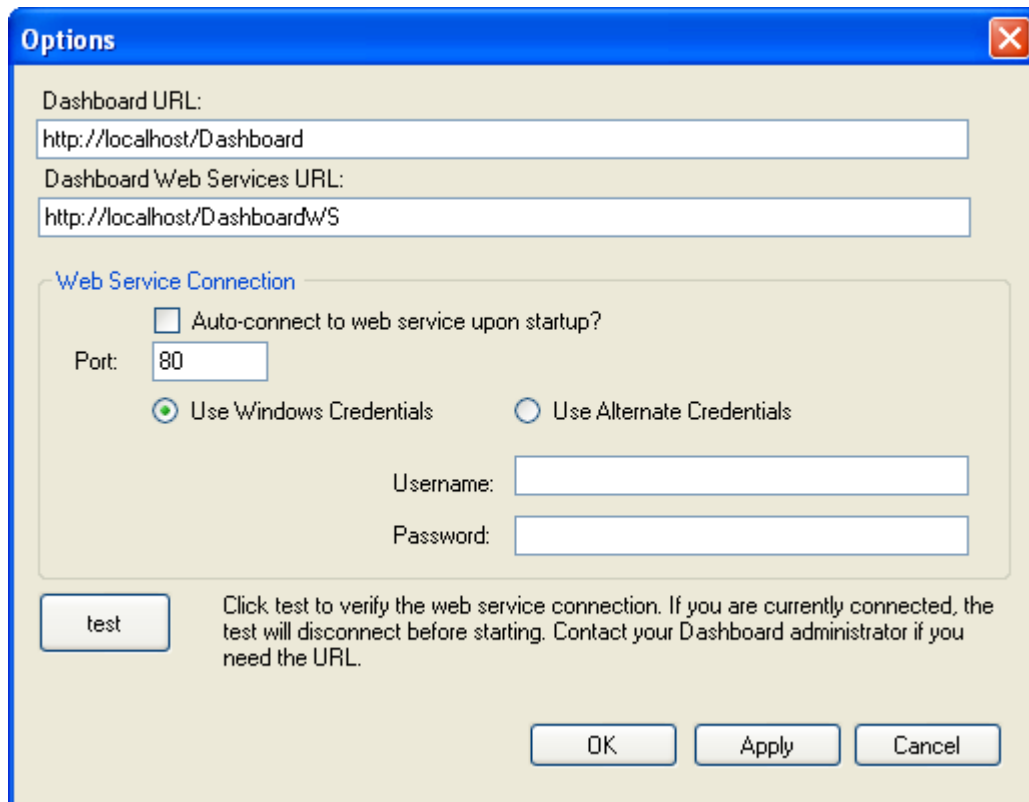
Verify Connection to Web Services

The Collector uses the Express Web Services to communicate with the Portal. To verify your connection to the Web Services, click File, Options from the menu bar. By default the 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 server where the Portal is installed, you will need to change the "localhost" part of the URL to the name of the server running the Portal. Be sure to click the **Apply** button if you make any changes.

Click the **test** button to test the connection.



Options

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 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 Cancel

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.

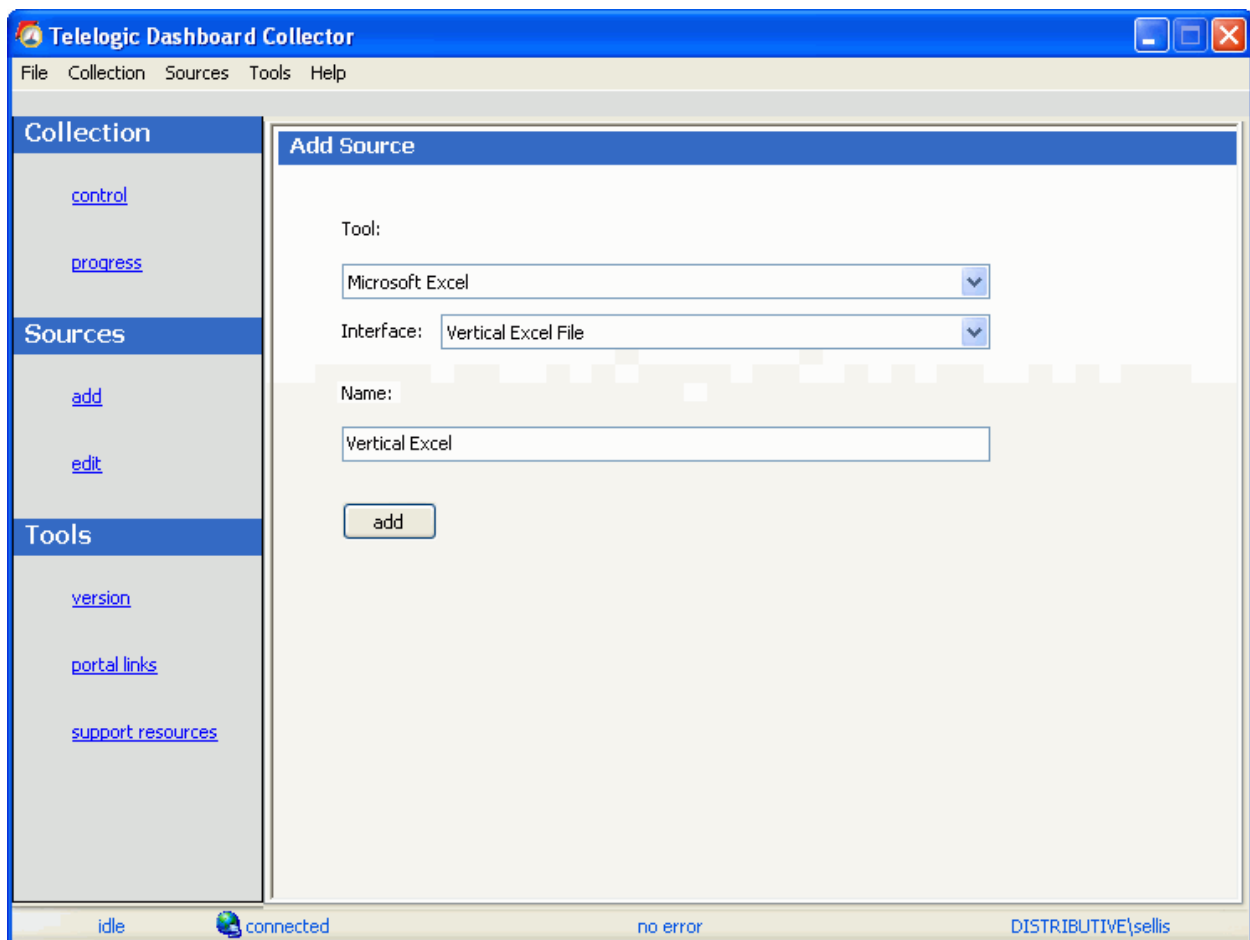
Add a Source

Choose **add** under the Sources section on the menu on the left hand side. Select Microsoft Excel from the drop down menu for the **Tool** field.

Notice a drop down list of **Interfaces** below the Tool selection. This is used to delineate between different instances of a tool and let the Collector know which Interface to use when collecting from a specific source. Select the Excel Vertical Interface from this drop down menu.

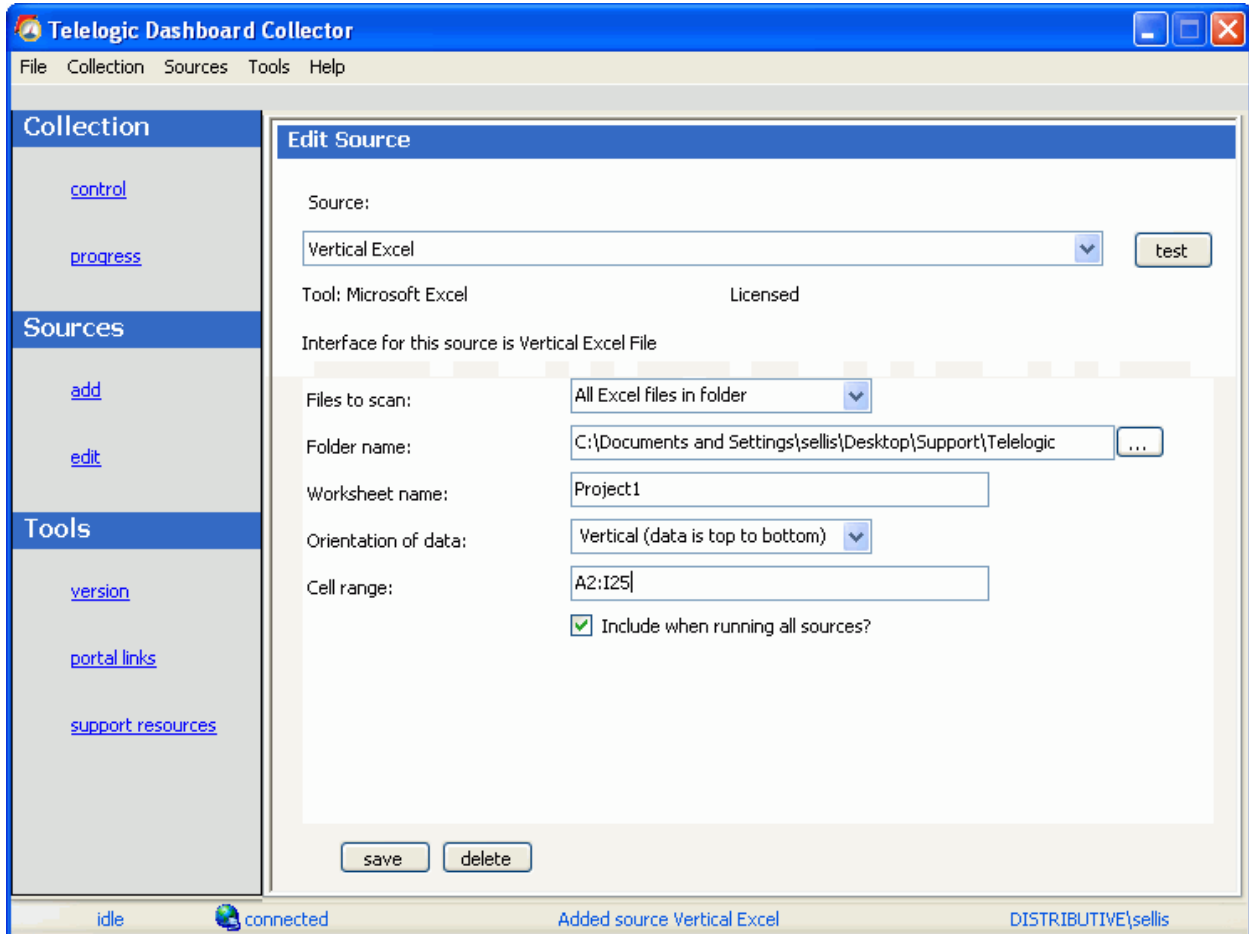
Enter a **Name** that will help to identify the source when used at a later time.

Once all information is selected, click **Add**.



Setting up the Collector

The setup for a Microsoft Excel file requires some basic information about the file. First of all, there are several ways to collect in a Microsoft Excel file. The first is "All Excel 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 were set up in the Interface from all of the Microsoft Excel files in that folder. An example of 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, all of the projects could 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 Name**.

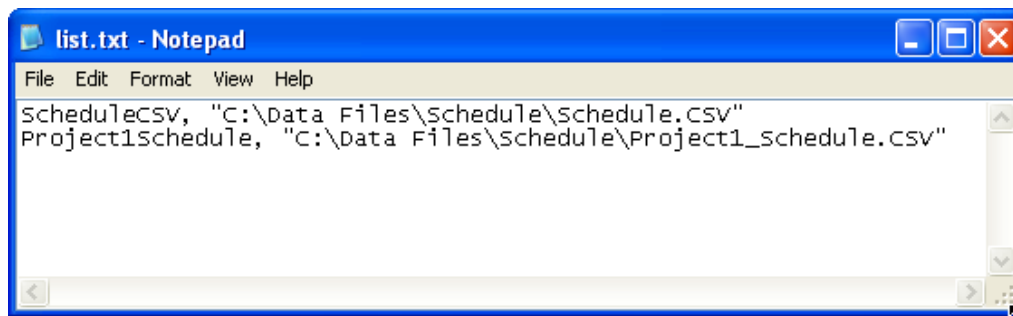


Enter the name of the worksheet where the data resides in the **Worksheet Name** field.

The **Orientation of data** field indicates to the Collector how to read the data in the Microsoft Excel file. The selection in this field should match the setup of your Microsoft Excel file performed earlier. For this example, select the Vertical orientation.

For the **Cell range** field, enter the range of cells in which the data has been entered in the worksheet. (This should not include the headers for your data.)

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



You must create this file and choose where (which folder) this file is stored. The **Worksheet name**, **Orientation of Data**, and **Cell Range** fields are completed the same as above.

The final option is using the 'Date Stamped Excel Files' option. This option allows you to put files in a given folder that have a date stamp on them showing on which date they should be collected. The format for these file names should be <filename>_yyyymmdd.xls. The dates should match the Collection date for the schedule that is assigned to the item. The default schedule has a collection date of the last day of the month, so an example would be schedule_20070131.xls, which would have data for the month of January in 2007.

Once again the **Worksheet name**, **Orientation of Data**, and **Cell Range** fields are completed the same as above for this option.

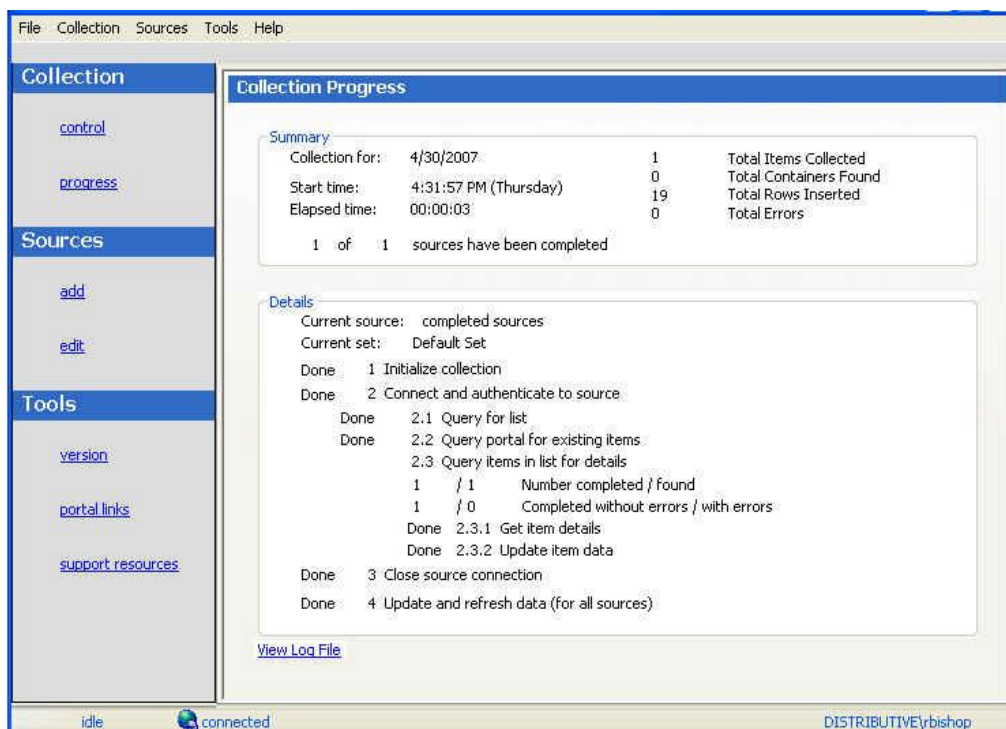
Be sure to save your settings by clicking the **save** button in the bottom left corner.

Running a Collection

Once you have saved your configurations, you are ready to run the collection. Go to the **control** link in the Collection section. Click the radio button for One Source and select your Microsoft Excel 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 Portal 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 have picked the source and the collection 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 you have progressed through the collection.



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.

Configuring the Unit

Assigning Collected Items

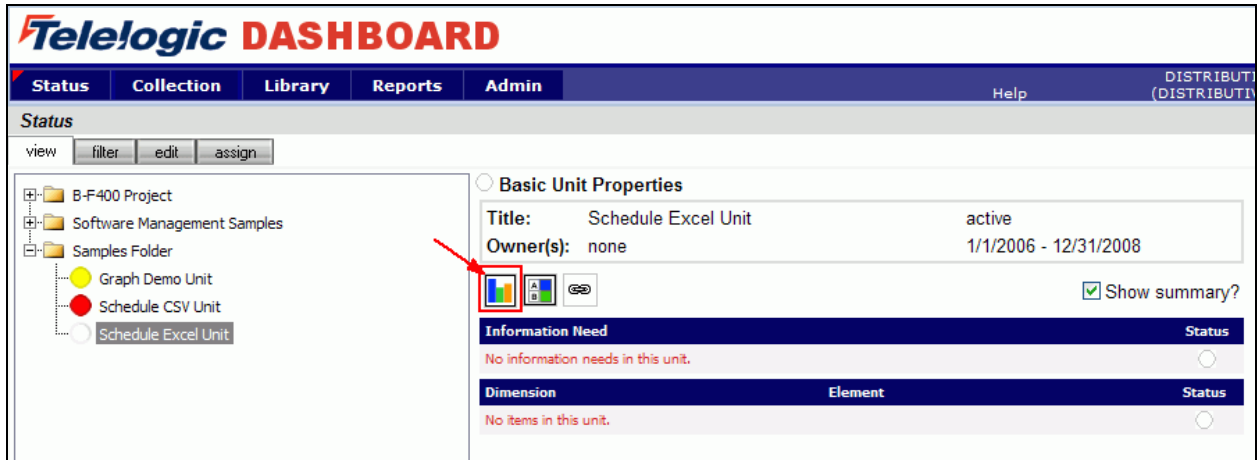
Once you have run the collection without errors, you are ready to add **Items** to a **Unit**. Go back to the **Status** page and click on the **assign** subtab. Click on the Unit you created earlier. On the right hand side, click on the **by source** subtab. From the drop down menus, choose your Collector and the interface that you are using to collect. When you have 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, along with a Help link. The main content area is titled 'Status' and includes sub-tabs for view, filter, edit, and assign. On the left, a tree view shows a hierarchy of folders: B-F400 Project, Software Management Samples, and Samples Folder. Under Samples Folder, there are three units: Graph Demo Unit, Schedule CSV Unit, and Schedule Excel Unit. On the right, a filter panel allows selection of 'by date' or 'by source'. The 'Status' filter is set to 'all', 'Collector' is 'Server', and 'Interface' is 'Vertical Excel File'. There are radio buttons for 'show items' (selected) and 'show containers', and a 'show' button. Below the filter panel is an 'Item List' section with 'ignore' and 'assign' buttons. The list contains one item: 'inspections.xls'. At the bottom left, there is an 'Assigned Items' section with a 'Show: all' dropdown 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.

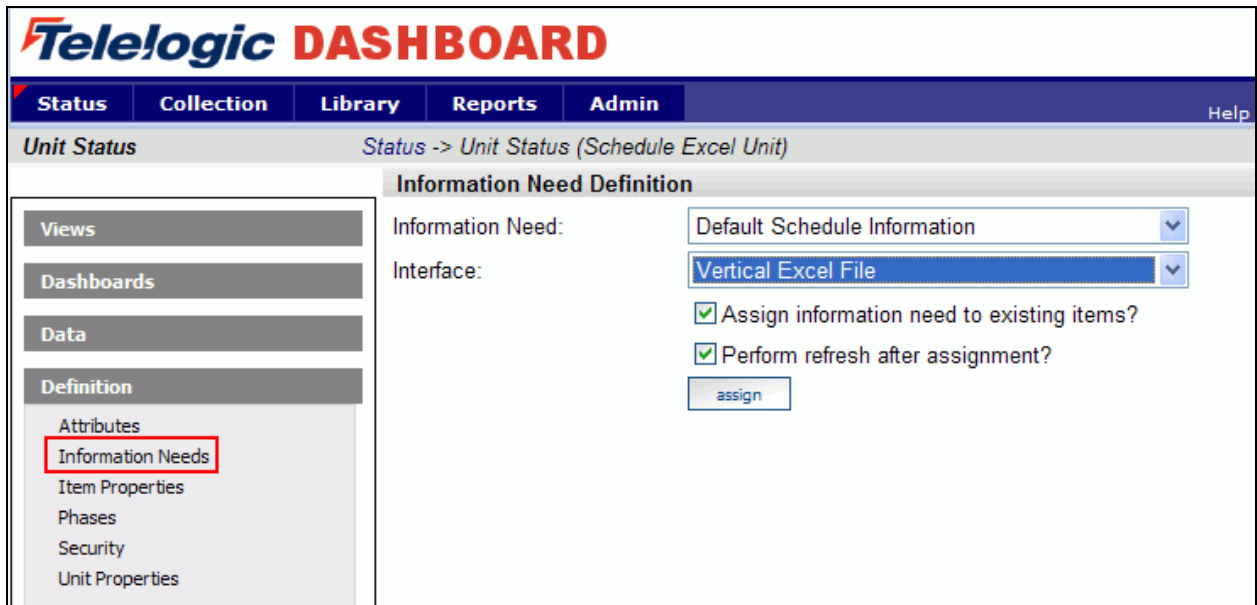
Assigning the Information Need to the Unit

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', and 'Admin'. The 'Status' tab is active. On the left, a tree view shows the hierarchy: B-F400 Project > Software Management Samples > Samples Folder > Graph Demo Unit, Schedule CSV Unit, and Schedule Excel Unit. The 'Schedule Excel Unit' is selected. On the right, the 'Basic Unit Properties' section shows 'Title: Schedule Excel Unit' and 'Owner(s): none'. Below this, the 'Information Need' section is highlighted with a red box, showing 'No information needs in this unit.' and a 'Status' column. The 'Dimension' section below it shows 'No items in this unit.' and an 'Element' column. A red arrow points to the 'Graph' button in the unit's toolbar.

When you get in the unit, you should see an empty GANTT chart with your items listed along the side. From there, click on the Information Need link under the Definition section.

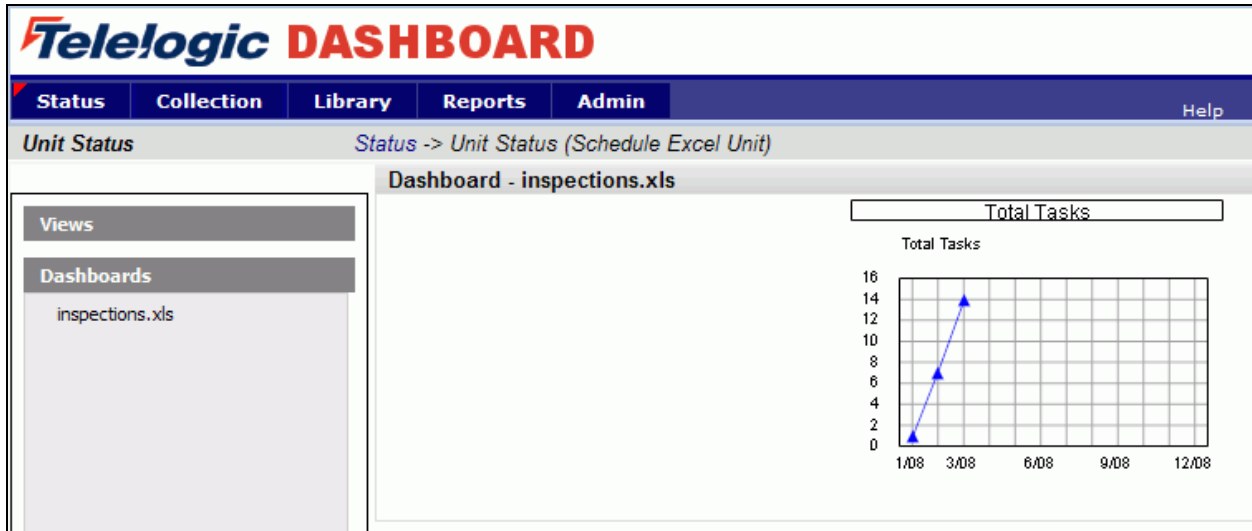


The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The 'Status' tab is active. The main content area is titled 'Unit Status' and 'Status -> Unit Status (Schedule Excel Unit)'. The 'Information Need Definition' section is active. On the left, a sidebar menu shows 'Views', 'Dashboards', 'Data', and 'Definition'. Under 'Definition', 'Information Needs' is highlighted with a red box. The main content area shows 'Information Need:' set to 'Default Schedule Information' and 'Interface:' set to 'Vertical Excel File'. There are two checked checkboxes: 'Assign information need to existing items?' and 'Perform refresh after assignment?'. An 'assign' button is at the bottom.

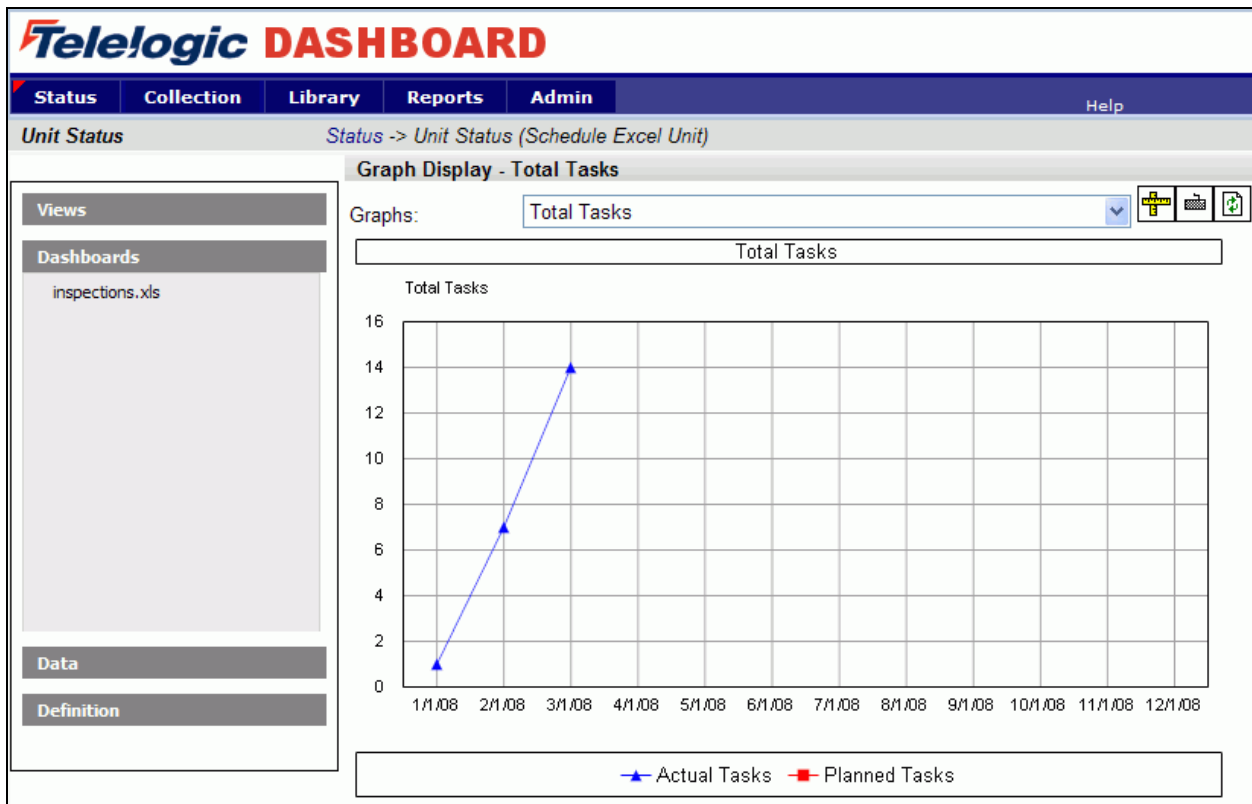
From the drop down lists, select the Information Need and the Interface that you are using. When you have selected these, click the **assign** button.

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.

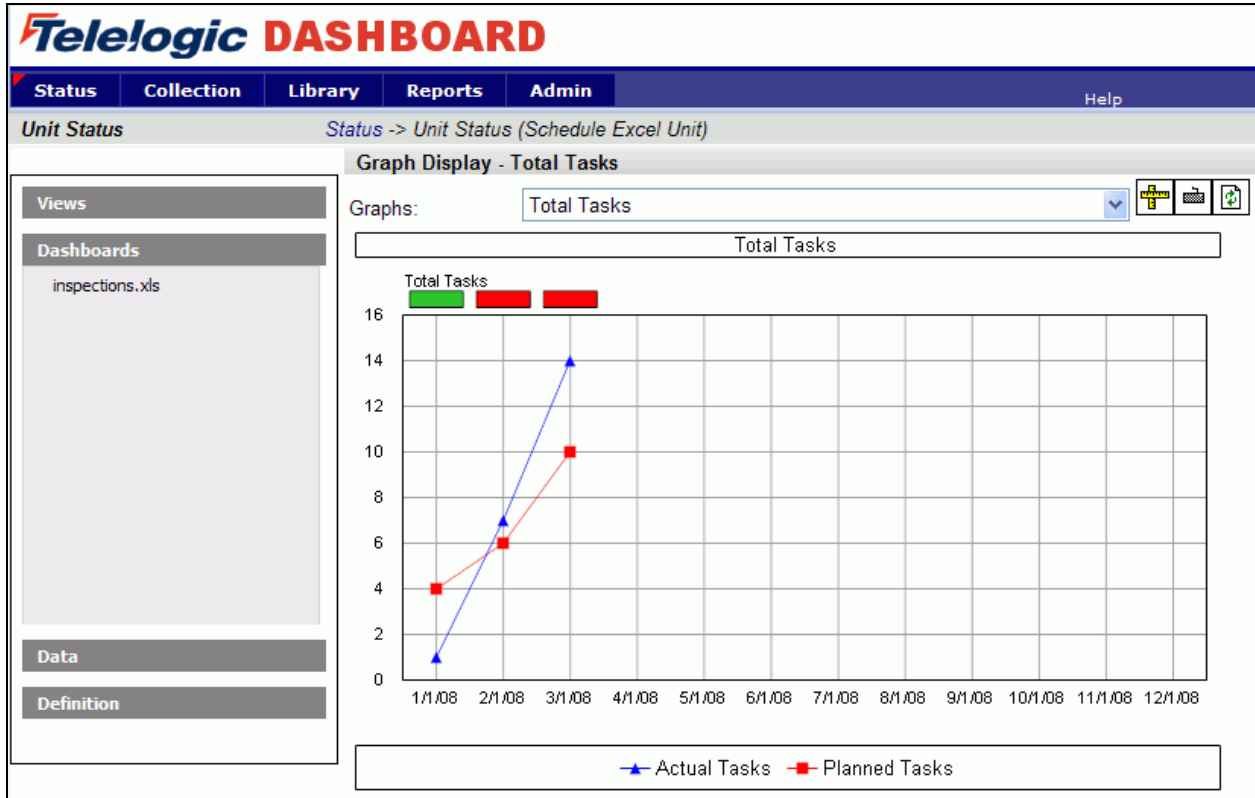
This will open the Graph Definition window for the selected graph.

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.

	Actual Tasks	Planned Tasks	Total Tasks
1/1/2008 - 1/31/2008	1	4	
2/1/2008 - 2/29/2008	7	6	
3/1/2008 - 3/31/2008	14	10	
4/1/2008 - 4/30/2008			

Save this data and return to the graph view.

The data and alarm should now all show data.



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