

***Telelogic Dashboard
Synergy 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 Synergy Walkthrough for Telelogic Dashboard!

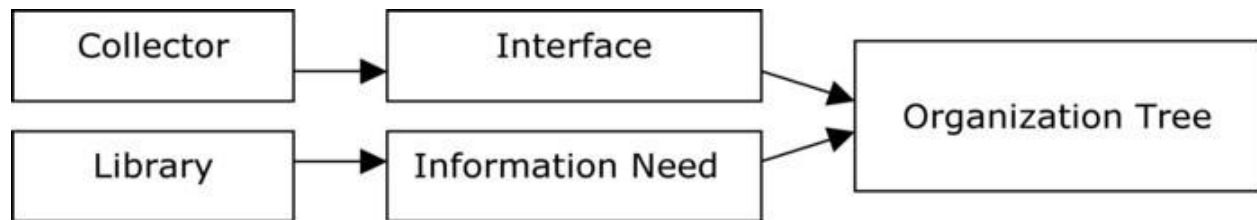
Telelogic Dashboard brings software management best practices within reach of every organization and every manager. Manage requirements, schedule, budget, quality, configuration management and size in one place; keeping total control of the drivers that keep projects on time and within budget.

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 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 Synergy Sample Walkthrough

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

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

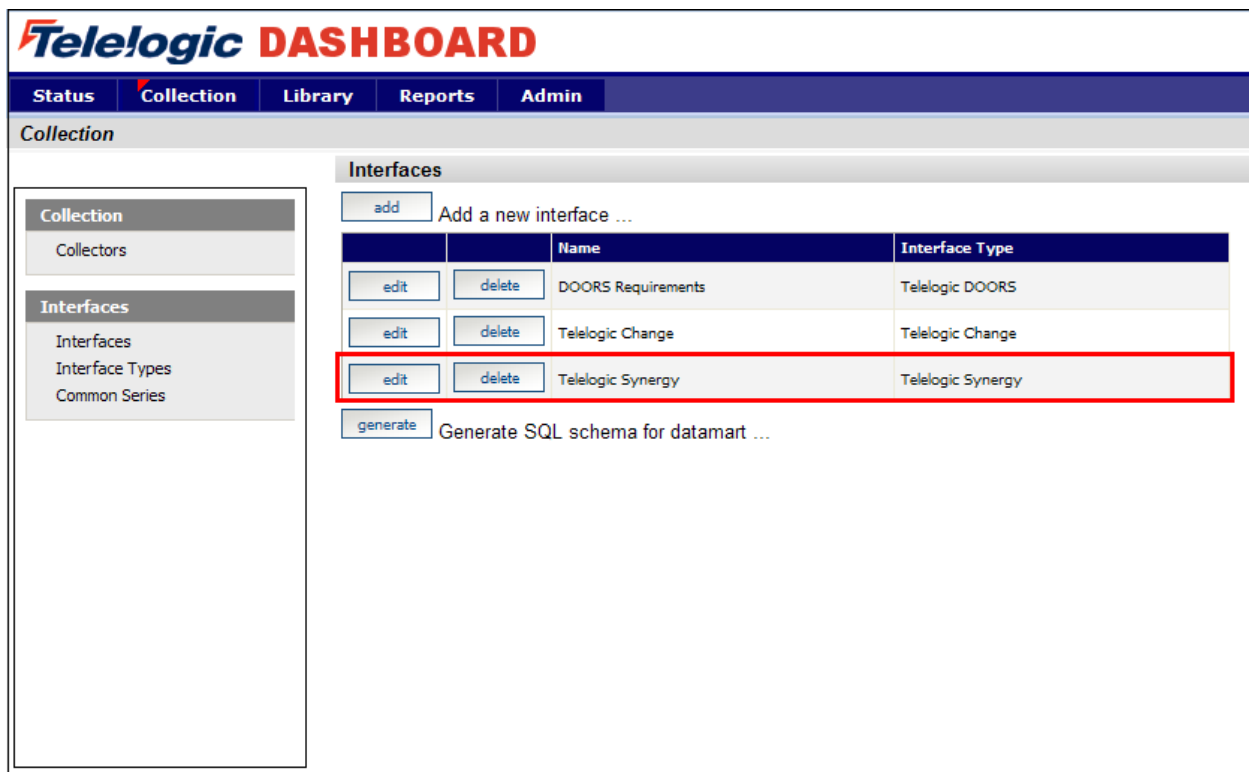
- Portal Configuration:
 - Examine/Configure an Interface in the Portal
 - Examine/Configure an Information Need
 - Assigning Schedules to a Template
 - Setup a Unit with a Template
- Collector Configuration
 - Configure the Collector
 - Run a collection
 - Check/Resolve any collection errors/problems
- 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 Synergy.

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 (selected), Library, Reports, and Admin. Below the navigation bar, the 'Collection' section is active, and the 'Interfaces' sub-section is selected. On the left-hand side, there is a sidebar menu with options for Collection (Collectors) and Interfaces (Interfaces, Interface Types, Common Series). The main content area displays a table of interfaces. The table has columns for Name and Interface Type. The 'Telelogic Synergy' 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"/>	Telelogic Change	Telelogic Change
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Telelogic Synergy	Telelogic Synergy

Select the **edit** button for the Telelogic Synergy interface from the list of Interfaces displayed.

The interface will open in the **general** tab which provides an overview of the interface. Notice that the Transform Database has been selected as the Database. This specific interface is a default interface for Telelogic Synergy.

Telelogic DASHBOARD

Status **Collection** Library Reports Admin

Edit Interface Collection -> Edit Interface (Telelogic Synergy)

general fields queries

Name: Telelogic Synergy (13)

Interface Type: Telelogic Synergy

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?

Next, click on the fields tab.

Setting up the Fields

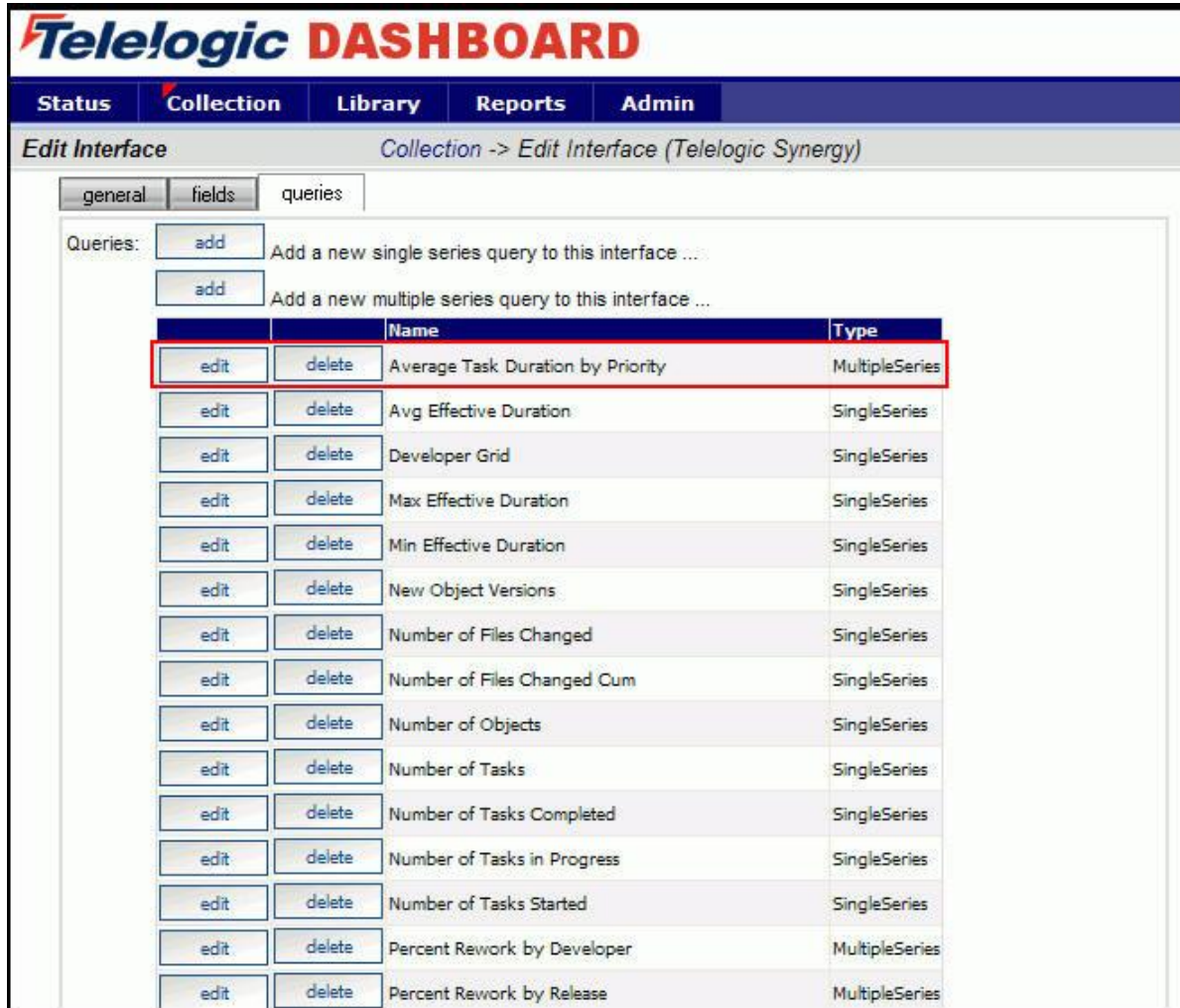
The information entered in the **fields** tab of the Interface defines the information that will be collected and where it will be stored. The list of sets (each containing a group of fields) and the database where the information will be stored is located on the left section of the screen. A list of 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.

The screenshot shows the 'Telelogic DASHBOARD' interface for editing a collection. The 'Collection -> Edit Interface (Telelogic Synergy)' page has three tabs: 'general', 'fields', and 'queries'. The 'fields' tab is active. On the left, the 'List of Sets' dropdown is set to 'Task Information'. Below it, the 'Title' is 'Task Information' and the 'Database Table' is 'SYN_CM_Task_Info'. A 'Parameter Replacement Tag' section contains an OCM query: `ocm query "(not cvtype='problem') and (not cvtype='project') and release='!RELEASE!' " -f "!!THEFIELDS!" -nf -u -ns`. On the right, the 'Fields in Selected Set' list includes: status - status (text 25), owner - owner (text 50), type - type (text 25), project - project (text 50), version - version (text 25), and task - task (text 50). The 'Selected Field Properties' for 'status' are: 'Do not collect from source?' (unchecked), 'Source Attribute: status', 'Table Field: status', 'Type: Text 25', and 'Value: Allow null - default optional' (selected). At the bottom, there are 'apply', 'delete', 'save', and 'cancel' buttons, along with two checked options: 'Add (new) table fields during save?' and '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.



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: 'Edit Interface' > 'Collection -> Edit Interface (Telelogic Synergy)'. There are three tabs: 'general', 'fields', and 'queries'. The 'queries' tab is active. Below the tabs, there are two 'add' buttons: 'Add a new single series query to this interface ...' and 'Add a new multiple series query to this interface ...'. Below these is a table of queries. The first row of the table is highlighted with a red border, and its 'edit' button is also highlighted with a red border.

		Name	Type
edit	delete	Average Task Duration by Priority	MultipleSeries
edit	delete	Avg Effective Duration	SingleSeries
edit	delete	Developer Grid	SingleSeries
edit	delete	Max Effective Duration	SingleSeries
edit	delete	Min Effective Duration	SingleSeries
edit	delete	New Object Versions	SingleSeries
edit	delete	Number of Files Changed	SingleSeries
edit	delete	Number of Files Changed Cum	SingleSeries
edit	delete	Number of Objects	SingleSeries
edit	delete	Number of Tasks	SingleSeries
edit	delete	Number of Tasks Completed	SingleSeries
edit	delete	Number of Tasks in Progress	SingleSeries
edit	delete	Number of Tasks Started	SingleSeries
edit	delete	Percent Rework by Developer	MultipleSeries
edit	delete	Percent Rework by Release	MultipleSeries

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.

There are two options available when modifying a query; Query Builder and Query Edit. Due to the complex nature of the queries used in Synergy, the edit query tab should be used instead of the query builder. The Edit Query tab has a **text field** where the SQL statements can be entered, modified or deleted.

Telelogic DASHBOARD

Status Collection Library Reports Admin

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

Title: Average Task Duration by Priority

Common Series: CM - Avg Task Dur by Pri

Query Builder Query Edit Test Query

Edit Query

```
SELECT AVG(completion_date-assignment_date) FROM SYN_CM_Task_Info
WHERE g_itemid=%ITEMID% AND g_collectdate=%COLDATE% AND priority = '%
MULTIVALUE%' and type='task'
```

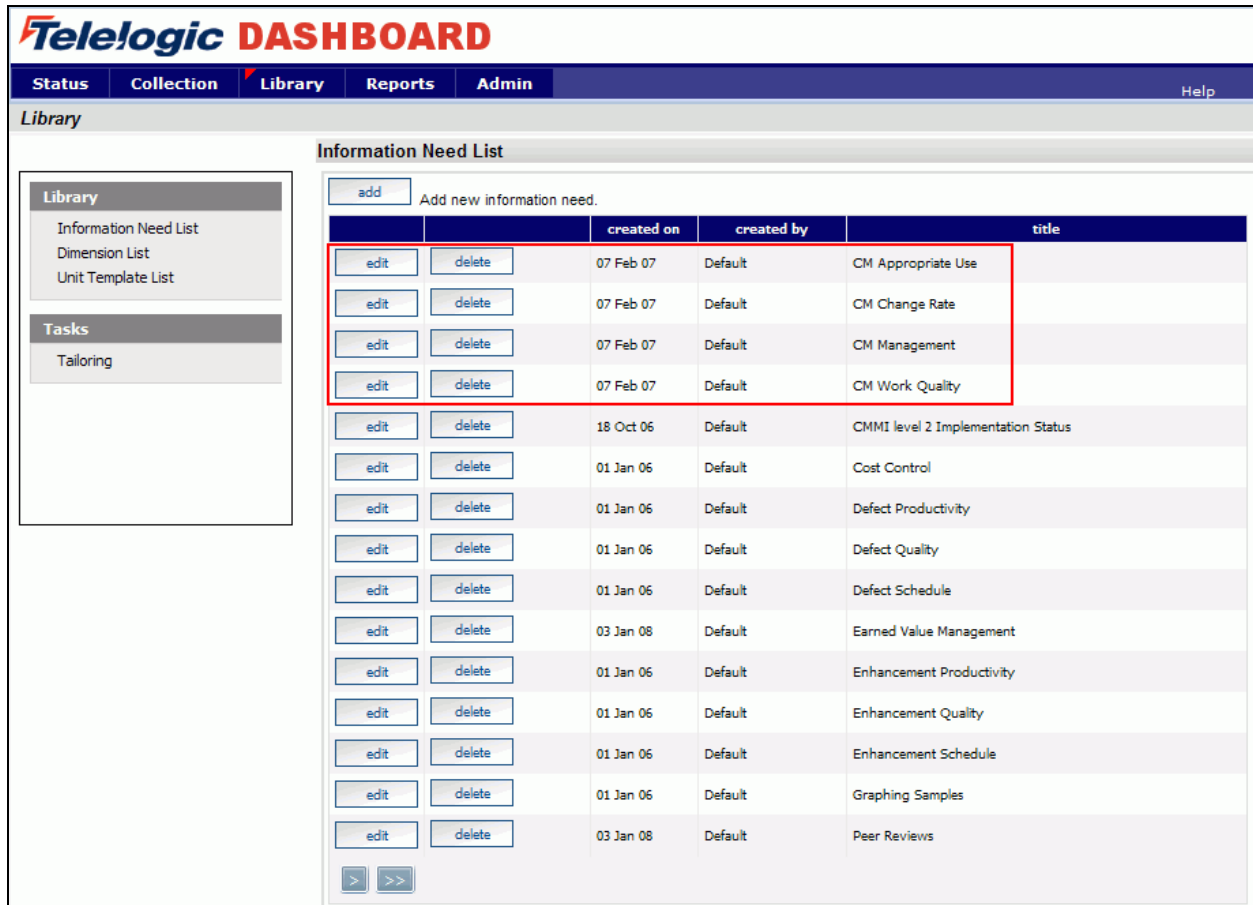
save

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 to the Information Need in order for the Collector to run. This will allow you to familiarize yourself with the graphs that will be used to display data in the future. To see the Information Needs, click on the **Library** tab of the Portal.

There are four information needs that are setup to work with Telelogic Synergy automatically. They are: CM Appropriate Use, CM Change Rate, CM Management and CM Work Quality.



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library' (selected), 'Reports', and 'Admin'. Below the navigation bar, the 'Library' section is active, displaying the 'Information Need List'. On the left, there is a sidebar with 'Library' and 'Tasks' sections. The 'Information Need List' table contains the following data:

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

Let's take a look at the information need, CM Appropriate Use. To open the information need, click on the **edit** button.

The information need will default to the **general** tab.

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 (CM Appropriate Use)'. The 'general' tab is active, with other tabs being 'reference', 'guidance', 'graphs', and 'dimensions'. The form contains the following fields:

- Title: CM Appropriate Use (67)
- State: draft defined active retired
- May be exported to other sites?
- Keywords: (empty text area)
- Description: The CM Appropriate Use information need contains graphs to track the usage, size, and updates within a project.
- Metadata: Created on 2/7/2007 Created by Default Updated on: 2/14/2008
- Buttons: save, cancel

Selecting the **graphs** tab will list the graphs associated with the selected information need. In the sample below, CM Appropriate Use has five 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, with other tabs being 'general', 'reference', 'guidance', and 'dimensions'. The form contains the following elements:

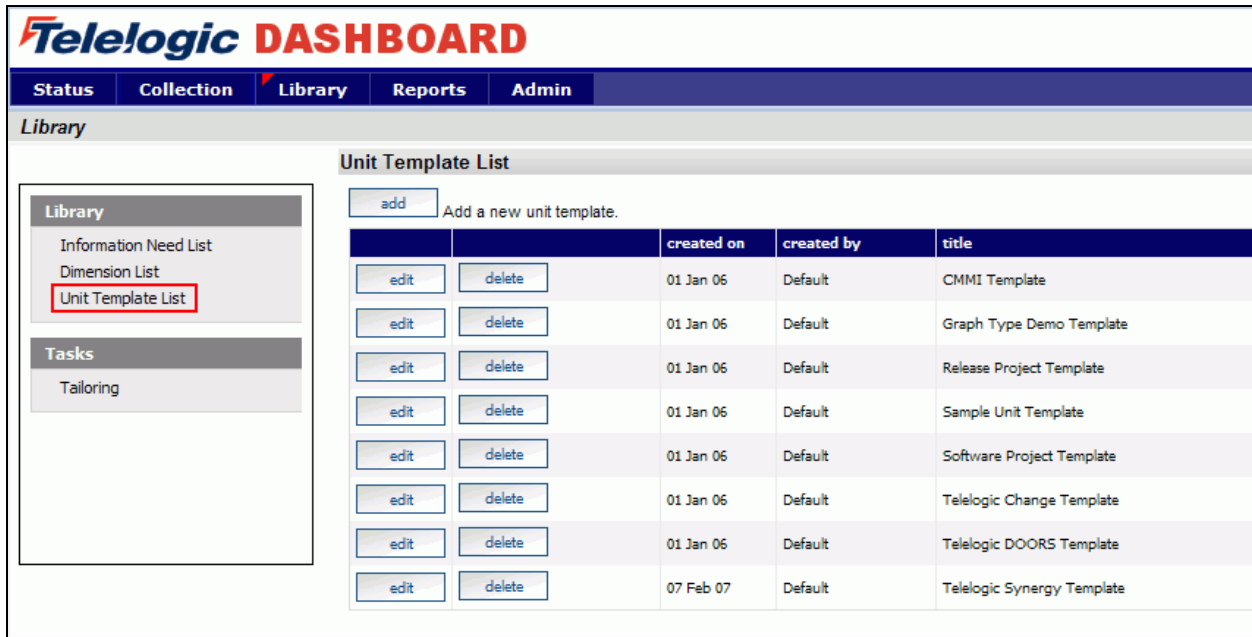
- Current Actual: no selection (dropdown)
- Current Plan: no selection (dropdown)
- Current Status: Percent Objects With 2 or More Previous Versions\Multiple Ancestor (dropdown)
- 5 graphs defined.
- Graphs section with buttons: edit, delete, add, and a link 'Add new graph ...'
- List of graphs:
 - Average Task Size (Run)
 - Developer Workspace Last Update (SnapshotGrid)
 - Percent Objects With 2 or More Previous Versions (Run)
 - Task Size Cumulative (Run)
 - Workspace Update Aging (VerticalBar)
- Buttons: save, cancel

The next step is to create a unit from a Synergy template.

Assign a Schedule to a Synergy 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.

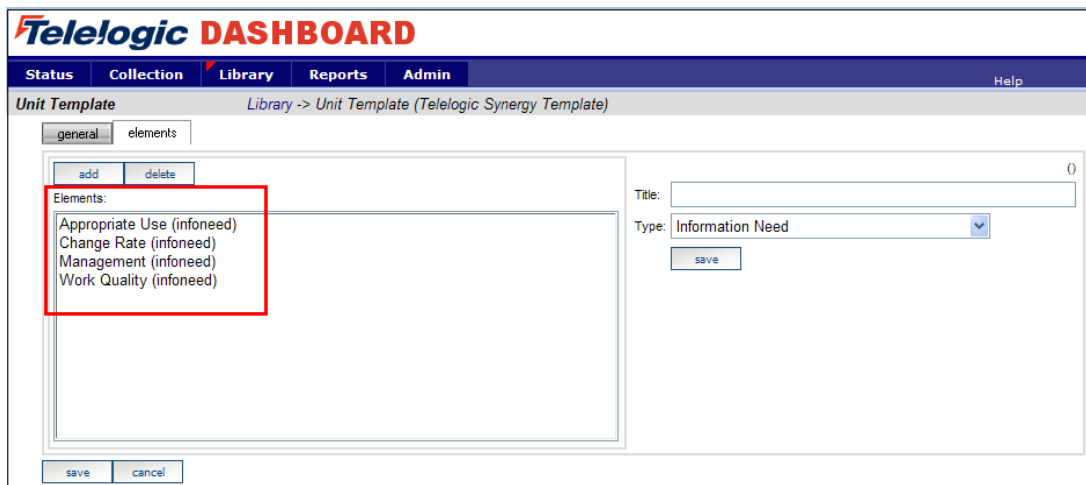
To include a schedule in a template, go to the **Library** tab. Select the **Unit Template List** from the Library section on the left hand side of the page. This will open a list of templates currently available for use.



The screenshot shows the Telelogic Dashboard with the Library tab selected. The Unit Template List is displayed, showing a table of templates with edit and delete buttons for each. The 'Unit Template List' is highlighted in the left-hand navigation menu.

		created on	created by	title
edit	delete	01 Jan 06	Default	CMMI 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	01 Jan 06	Default	Telelogic DOORS Template
edit	delete	07 Feb 07	Default	Telelogic Synergy Template

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



The screenshot shows the Telelogic Dashboard with the Unit Template page open. The 'elements' subtab is selected, displaying a list of elements assigned to the template. The 'Appropriate Use (infoeend)' element is highlighted in the list.

Elements:

- Appropriate Use (infoeend)
- Change Rate (infoeend)
- Management (infoeend)
- Work Quality (infoeend)

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 displays the 'Unit Template' interface in the Telelogic DASHBOARD. The navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The current page is 'Unit Template' under 'Library -> Unit Template (Telelogic Synergy Template)'. The 'elements' tab is active, showing a list of elements: 'Appropriate Use (infoneed)', 'Change Rate (infoneed)', 'Management (infoneed)', 'Monthly Schedule (schedule)', and 'Work Quality (infoneed)'. The 'Monthly Schedule (schedule)' element is highlighted. To the right, the 'add' button is visible, and the form fields are: 'Title: Monthly Schedule', 'Type: Default Schedule', and 'Schedule: Monthly Schedule 2008 - 2010'. A 'save' button is located below the form fields. At the bottom of the page, there are 'save' and 'cancel' buttons.

Make sure to **save** your changes.

Setup a Unit with the Synergy Template

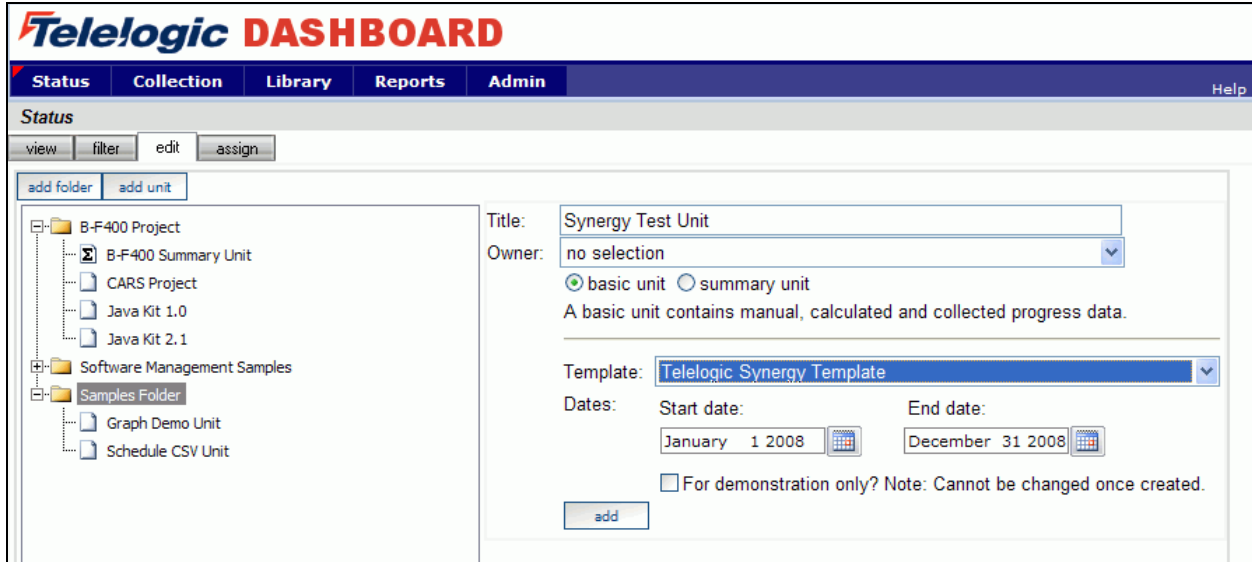
Once everything is set up correctly for the collection, the next step is to configure the Status tab to show the data results. A **unit** can be created for each project to display the data results and status for that project.

The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', 'Admin', and 'Help'. The 'Status' tab is active, and the 'edit' subtab is selected. On the left, a tree view shows a folder 'B-F400 Project' containing 'B-F400 Summary Unit', 'CARS Project', 'Java Kit 1.0', and 'Java Kit 2.1'. The 'Java Kit 2.1' unit is selected. The main area displays 'Basic Unit Properties' for 'Java Kit 2.1' with a 'demo' status and dates '12/13/2007 - 12/13/2008'. Below this, there are sections for 'Information Need', 'Dimension', and 'Form', each with a status indicator (red dot for 'Information Need' and 'CM Work Quality', white circle for 'Dimension', and green dot for 'Form').

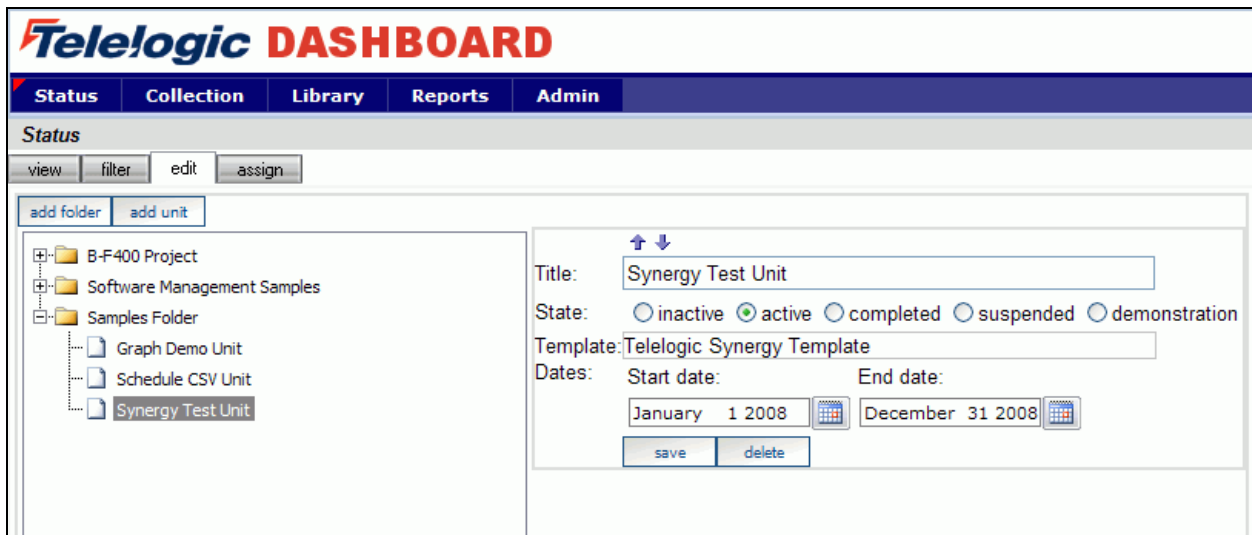
To start, click on the **Status** tab. To add a unit, click on the **edit** subtab to organize the data tree to include information on a project or projects. Create a folder, or use an existing one, and then add a unit.

The screenshot shows the Telelogic DASHBOARD interface with the 'Status' tab active and the 'add unit' subtab selected. The left tree view is the same as in the previous screenshot. The main area displays the 'add unit' dialog box for 'Java Kit 2.1'. The dialog includes fields for 'Title' (Java Kit 2.1), 'State' (radio buttons for inactive, active, completed, suspended, and demonstration, with 'demonstration' selected), 'Template' (none), and 'Dates' (Start date: December 13 2007, End date: December 13 2008). There are 'save' and 'delete' buttons at the bottom.

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 Synergy Template** from the drop down list. In the sample below, we added a new Unit to the Samples Folder and assigned the Telelogic Synergy Template.



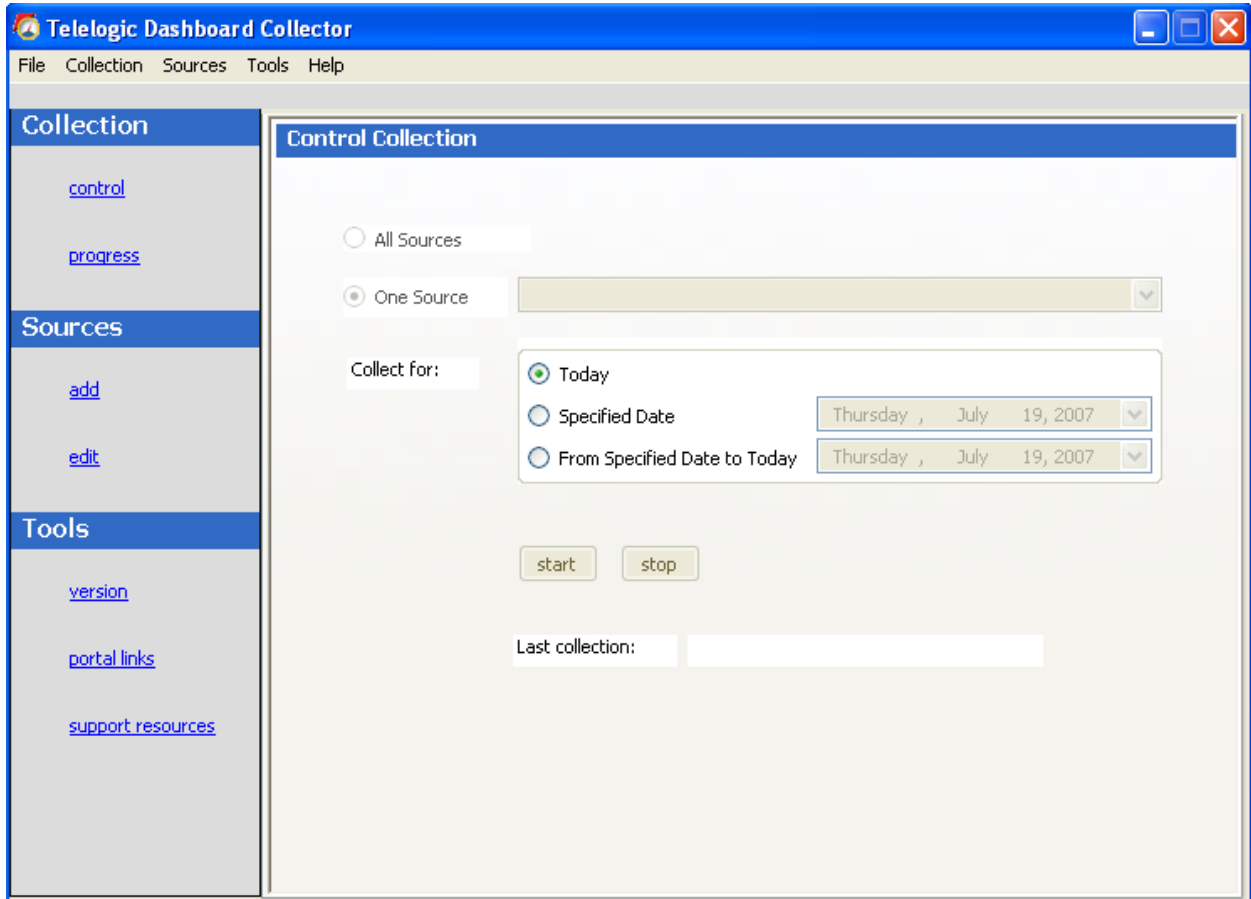
After you click the **add** button, the new unit will appear in the Status tree.



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

Configuring the Collector

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



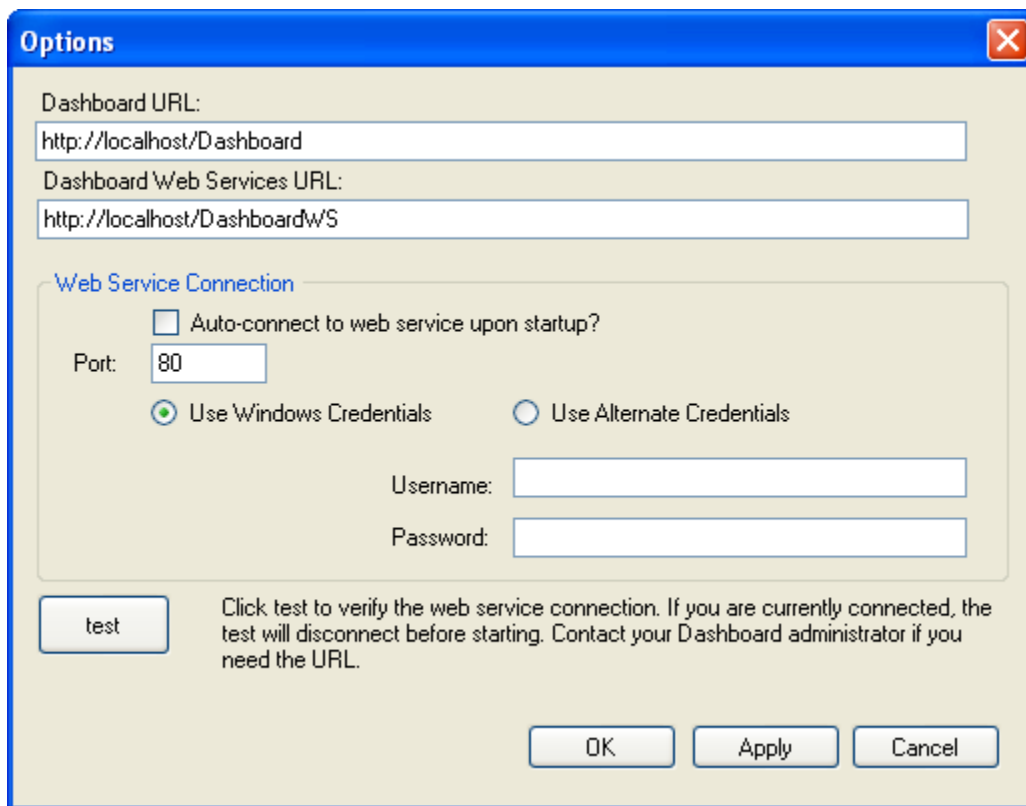
Verify Connection to Web Services

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 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.



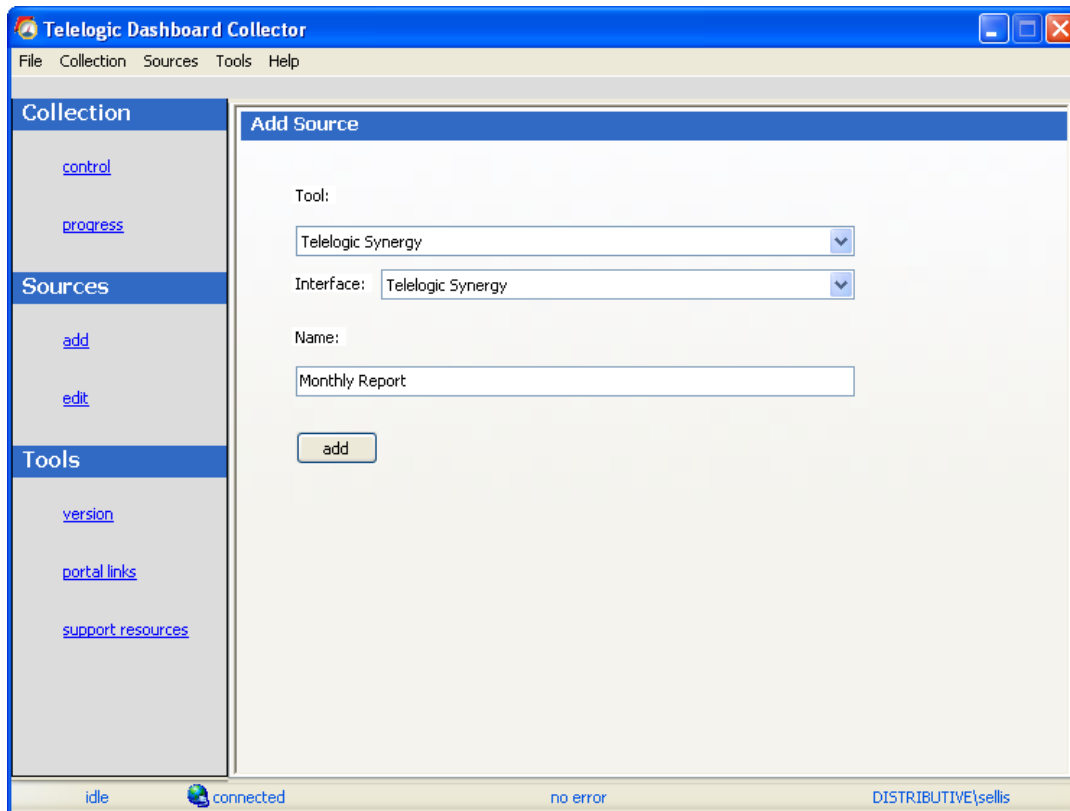
The screenshot shows a dialog box titled "Options" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- 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 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".
 - Below the radio buttons are two text boxes labeled "Username:" and "Password:", both of which are currently empty.
- A "test" button located at the bottom left of the dialog.
- A block of text at the bottom center: "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."
- At the bottom right, there are three buttons: "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.

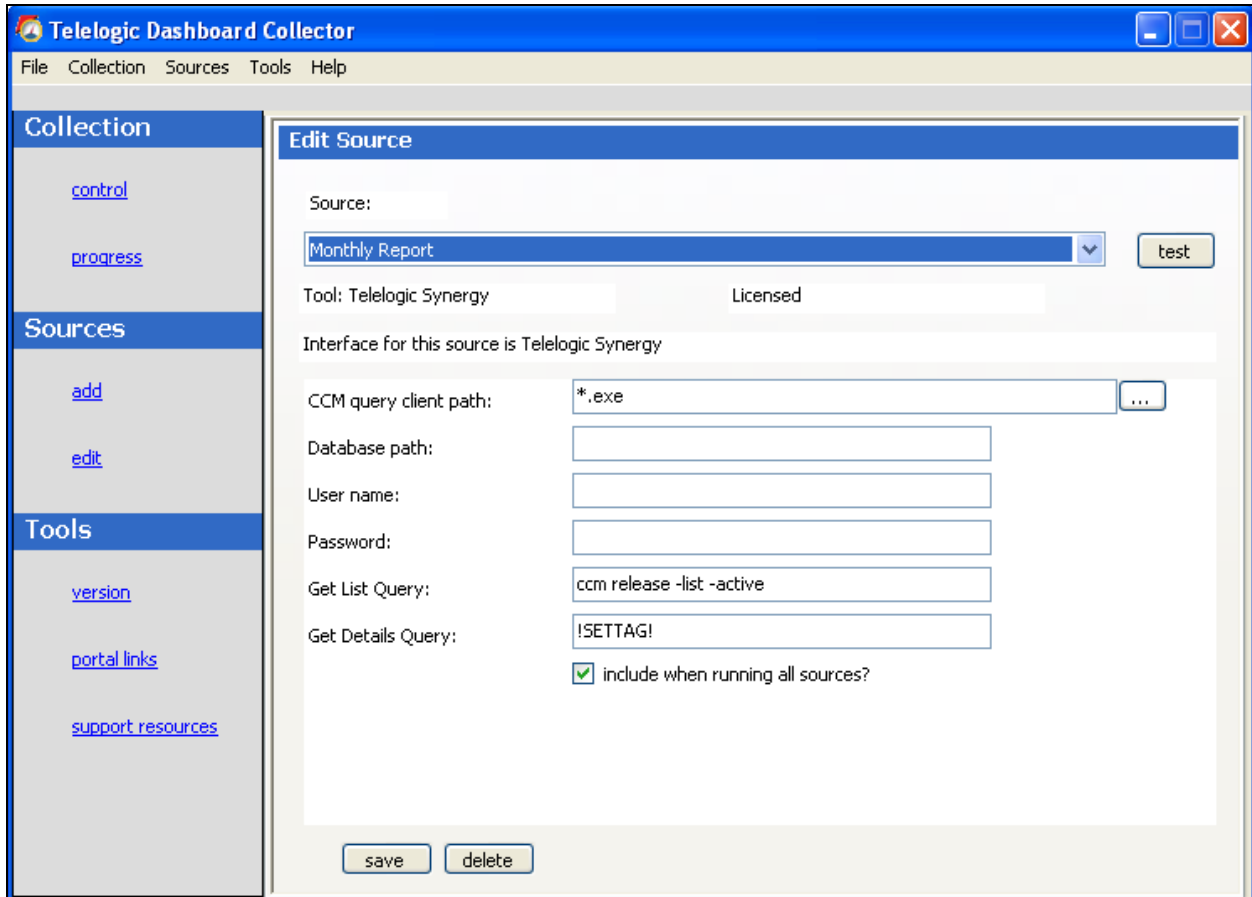
Add a Source

Choose **sources/add** from the left menu. Select Telelogic Synergy as the **Tool** and the **Interface** from the drop down menus 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 Synergy requires some basic log in information as well as some Portal specific information.



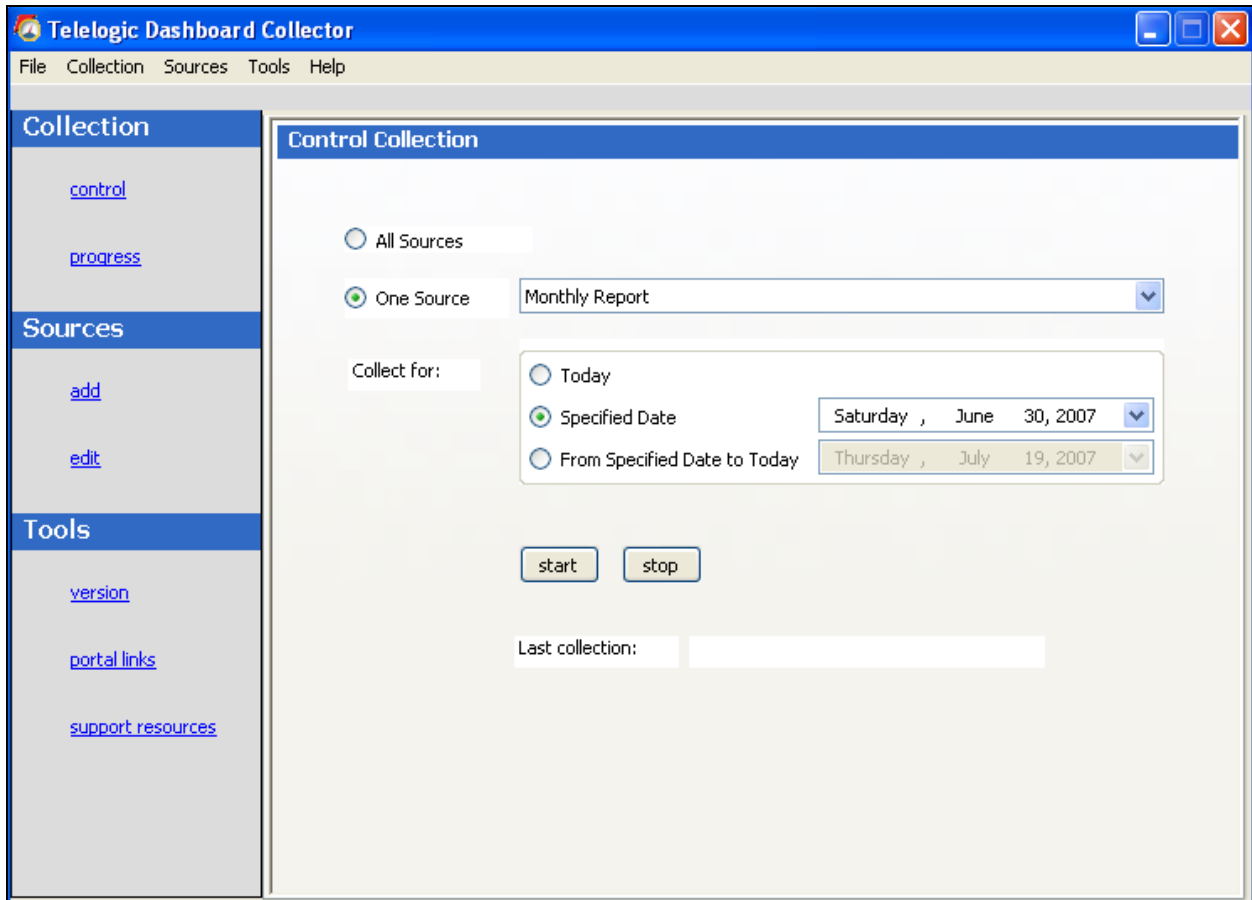
The **CCM query client path** is the location where Telelogic Synergy is installed on the local machine. The **Database path** is the location of the Telelogic Synergy Database. The **Username** and **Password** allows access to Synergy database.

The **Get List Query** will default to: ccm release -list -active. This query will return a list of releases. The items in the list are then used in the Get Details Query. The **Get Details Query** will default to: !SETTAG!. !SETTAG! is a reserved word used by the collector. During collection, the collector will replace the reserved word !SETTAG! with the text in each interface field set's 'Parameter Replacement Tag' field. The field set Parameter Replacement Tag is located on the field subtab of the Edit Interface screen. For Telelogic Synergy, the !SETTAG! reserved word is replaced by ccm queries found in the field sets for the Telelogic Synergy interface.

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

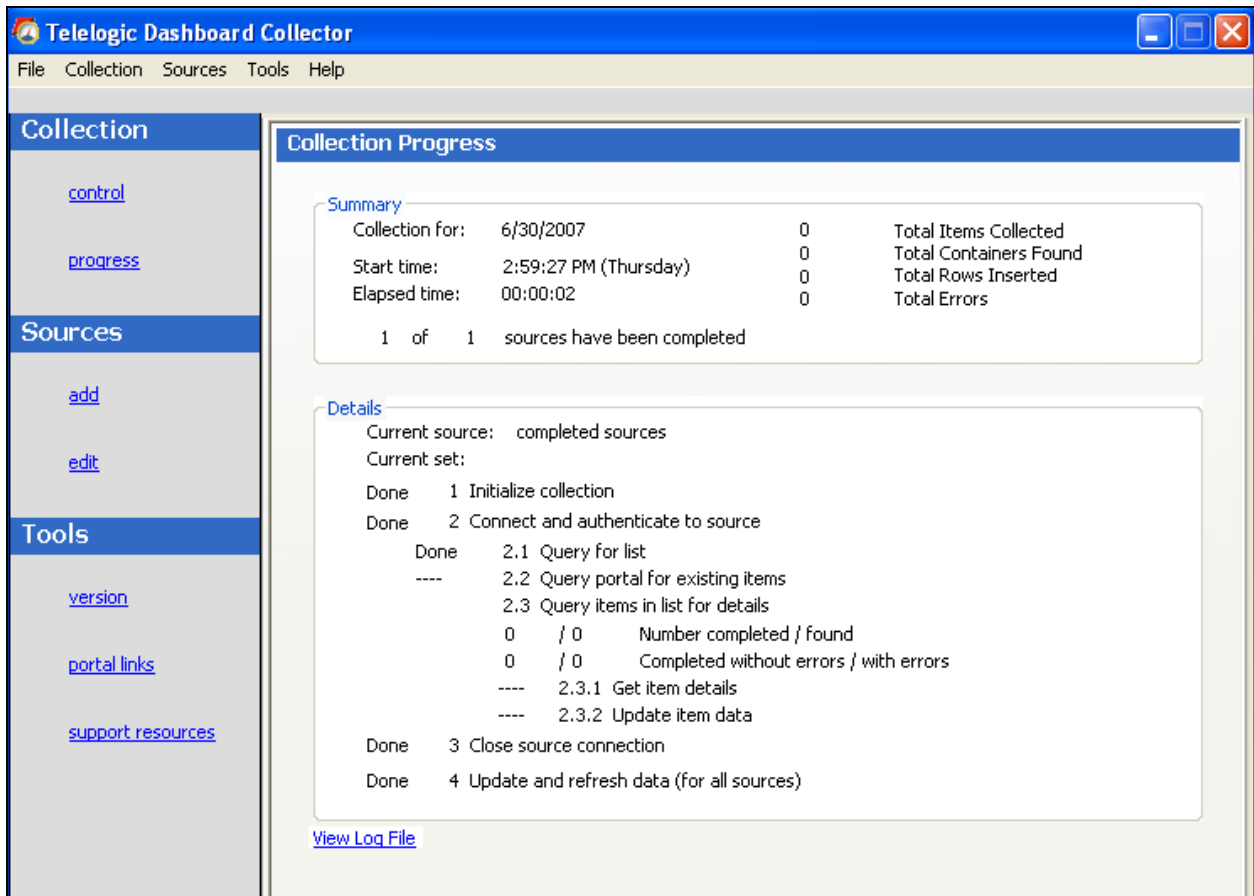
Running a Collection

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.



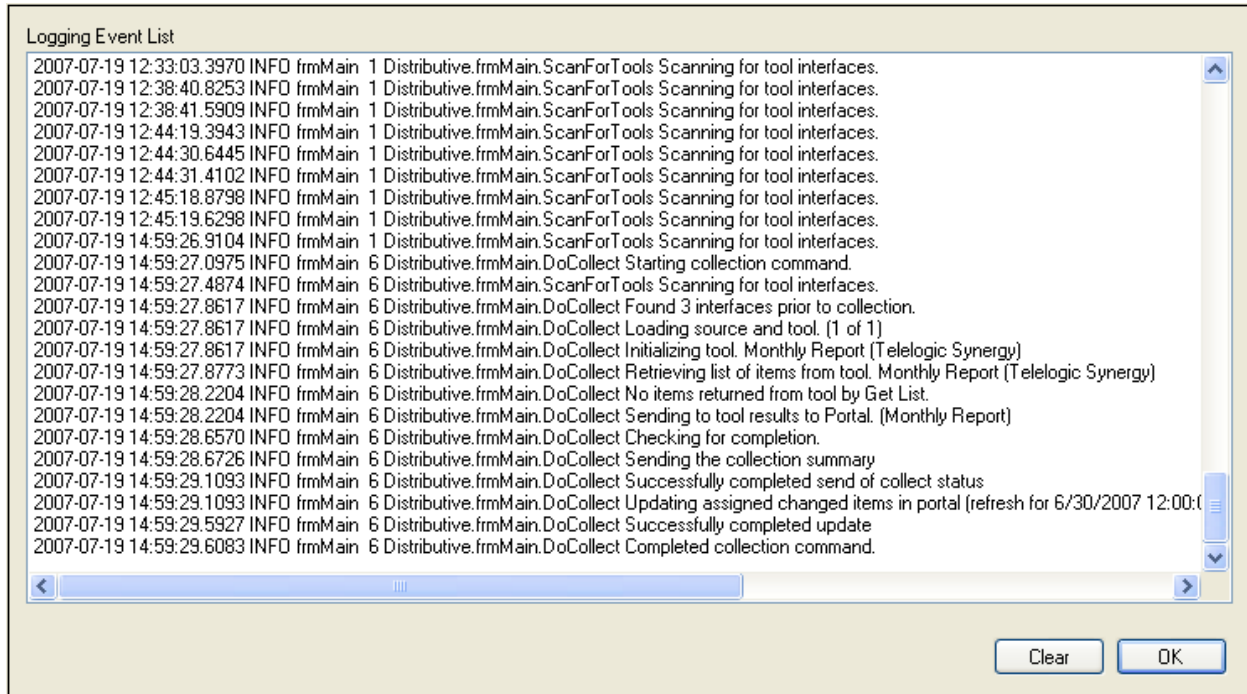
Once you've picked your source and your date, click on the **start** button.

The **Collection Progress** page will appear and you will be able to track your collection as it runs. You'll 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.



The next step is configuring the Unit.

Unit Configuration

Assigning Collected Items

Once you have run the collection without errors, you are ready to add **Items** to the **Unit**. Go back to the **Status** page and click on the **assign** subtab. Select 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 names of the items will be the names of your releases.

The screenshot displays the Telelogic DASHBOARD interface. At the top, the navigation menu includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The 'Status' subtab is active, showing a 'view filter edit assign' toolbar. On the left, a tree view shows a hierarchy: 'B-F400 Project' > 'Software Management Samples' > 'Samples Folder' > 'Graph Demo Unit', 'Schedule CSV Unit', and 'Synergy Test Unit'. The 'Synergy Test Unit' is selected. On the right, the 'by source' subtab is active. It features a 'Status' section with radio buttons for 'all' (selected), 'unassigned', 'assigned', and 'ignored'. Below this are dropdown menus for 'Collector' (SHANNON) and 'Interface' (Telelogic Synergy). There are also radio buttons for 'show items' (selected) and 'show containers', and a 'show' button. Below the configuration is an 'Item List' section with 'ignore' and 'assign' buttons. The list contains three items: 'SYNERGY/Change Item', 'Telelogic Synergy Item', and 'Telelogic Synergy Item'. At the bottom left, there is an 'Assigned Items' section with a 'Show: all' dropdown and an 'unassign' button, followed by an empty list box.

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 are navigation tabs for 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The 'Status' tab is active. Below the navigation, there are buttons for 'view', 'filter', 'edit', and 'assign'. On the left, a tree view shows a folder structure: 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. Under 'Samples Folder', there are three items: 'Graph Demo Unit', 'Schedule CSV Unit', and 'Synergy Test Unit'. On the right, there are filters for 'by date' and 'by source'. Below these are radio buttons for 'Status' (all, unassigned, assigned, ignored), dropdown menus for 'Collector' (SHANNON) and 'Interface' (Telelogic Synergy), and radio buttons for 'show items' and 'show containers'. A 'show' button is also present. Below the filters is an 'Item List' section with 'ignore' and 'assign' buttons. The 'Item List' contains three entries: 'SYNERGY/Change Item', 'Telelogic Synergy Item', and 'Telelogic Synergy Item', with the last two highlighted in blue. 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 'Telelogic Synergy Item (item)'.

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

The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The 'Status' tab is active, and the 'view' subtab is selected. On the left, a tree view shows the hierarchy: B-F400 Project, Software Management Samples, Samples Folder, Graph Demo Unit, Schedule CSV Unit, and Synergy Test Unit. A red arrow points to the 'Details' button (represented by a bar chart icon) for the 'Synergy Test Unit'. The right pane displays 'Basic Unit Properties' for 'Synergy Test Unit', showing it is 'active' with 'Owner(s): none' and a period of '1/1/2008 - 12/31/2008'. Below this is a table for 'Information Need' and 'Dimension'.

Information Need	Status
CM Appropriate Use	<input type="radio"/>
CM Change Rate	<input type="radio"/>
CM Management	<input type="radio"/>
CM Work Quality	<input type="radio"/>

Dimension	Element	Status
No items in this unit.		

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.

The screenshot shows the 'Unit Status' page for 'Synergy Test Unit'. The breadcrumb trail is 'Status -> Unit Status (Synergy Test Unit)'. The 'GANTT View' section shows a Gantt chart with a header 'phases' and a timeline for the year 2008. The timeline is divided into months: J, F, M, A, M, J, J, A, S, O, N, D. Below the Gantt chart, the text 'managed items' and 'Telelogic Synergy Item' is visible. On the left, a sidebar menu is shown with the 'Unit Properties' link highlighted by a red box.

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.

Telelogic DASHBOARD

Status Collection Library Reports Admin Help

Unit Status Status -> Unit Status (Synergy Test Unit)

Unit Definition

Title: Synergy Test Unit

Owner: no selection

State: inactive active completed suspended demonstration

Refresh Order: 0

Schedule: basic schedule mode advanced schedule mode

Monthly Schedule 2008 - 2010

Progress Report: no selection

Office Template: no selection

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

Description:

URL: [+] Hyperlink

Project Stage:

Project Plan:

Site/Location:

Contract/Project No:

Customer:

Sponsor:

Team:

Forms: Action Items Risks

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 March 31st, you would want to refresh over that date.

In this example, the refresh runs from January 1st to April 1st, but it could be any span of dates that include March 31st.

Telelogic DASHBOARD

Status **Collection** **Library** **Reports** **Admin**

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

Selected Unit: Synergy Test Unit

Refresh series with measures for the following date range:

start: January 1 2008 [calendar icon]

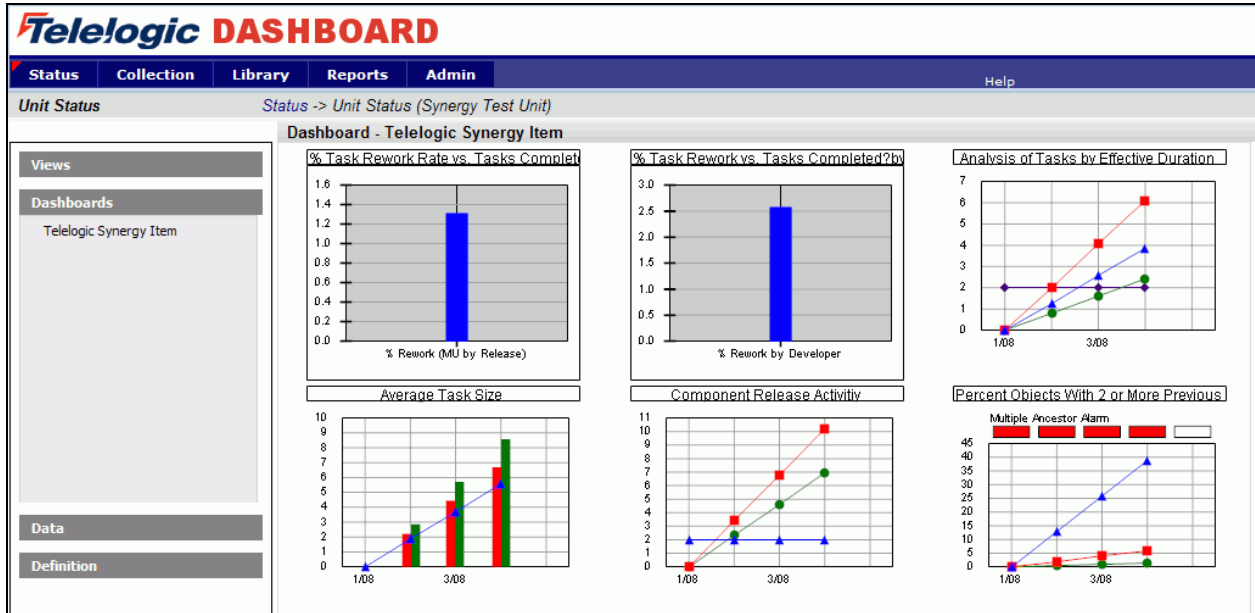
end: April 1 2008 [calendar icon]

Status:

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 **Dashboard** to view. You should see a data point in your graphs for the date that you ran the collection.



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