

Before using this information, be sure to read the general information under the "Notices" section on page 36.

This edition applies to **VERSION 4.0, Rational Dashboard** and to all subsequent releases and modifications until otherwise indicated in new editions.

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Welcome

Welcome to the on-line Synergy Walkthrough for IBM Rational Dashboard!

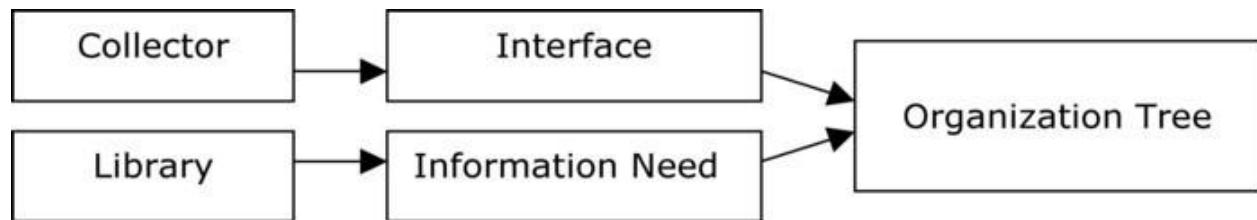
IBM Rational Dashboard brings software management best practices within reach of every organization and every manager. Manage requirements, schedule, budget, quality, configuration management and size in one place; keeping total control of the drivers that keep projects on time and within budget.

IBM Rational Dashboard spans the gap between the management process desired and the one currently in place. Focus on managing by exception using IBM Rational 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, IBM Rational Dashboard delivers industry best practices ready to be applied. Finally, IBM Rational 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: IBM Rational DOORS, IBM Rational Synergy, IBM Rational 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**.

IBM Rational Synergy Sample Walkthrough

This sample describes the steps to needed to configure and collect data from IBM Rational Synergy. This sample walks a new user through all required steps needed to see graphs with data points populated with information from IBM Rational 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 IBM Rational 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 'Collection' interface. On the left is a sidebar with two main sections: 'Collection' (containing 'Collectors') and 'Interfaces' (containing 'Interfaces' and 'Interface Types'). The 'Interfaces' section is active. The main area is titled 'Interfaces' and contains an 'Add' button with the text 'Add a new interface.' Below this is a table with the following data:

		Name	Interface Type
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	DOORS Requirements	IBM Rational DOORS
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	IBM Rational Change	IBM Rational Change
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	IBM Rational Synergy	IBM Rational Synergy

Below the table is a 'Generate' button with the text 'Generate SQL schema for datamart.'

Select the **edit** button for the IBM Rational 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 IBM Rational Synergy.

Edit Interface *Collection -> Edit Interface (IBM Rational Synergy)*

general | fields | queries

Name: IBM Rational Synergy (13)

Interface Type: IBM Rational 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

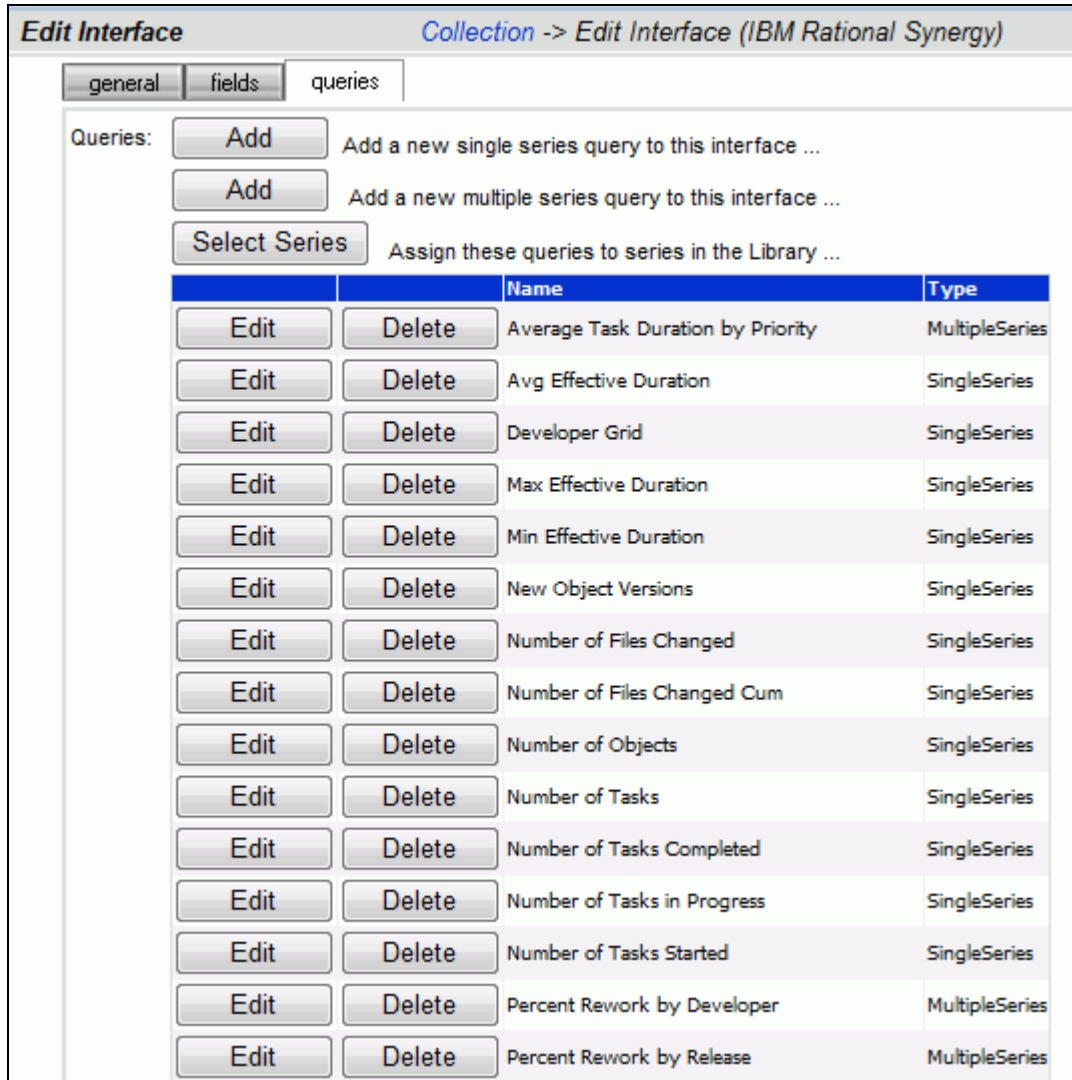
The information entered in the **fields** tab of the Interface defines the information that will be collected and where it will be stored. The list of sets (each containing a group of fields) and the database where the information will be stored is located on the left section of the screen. A list of 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 'Edit Interface' window for 'Collection -> Edit Interface (IBM Rational Synergy)'. 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 shown, with 'Do not collect from source?' unchecked, 'Source Attribute' as 'status', 'Table Field' as 'status', 'Type' as 'Text 25', and 'Value' set to 'Allow null - default optional'. At the bottom, there are 'apply', 'delete', 'save', and 'cancel' buttons, along with two checked checkboxes: '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.



Edit Interface *Collection -> Edit Interface (IBM Rational Synergy)*

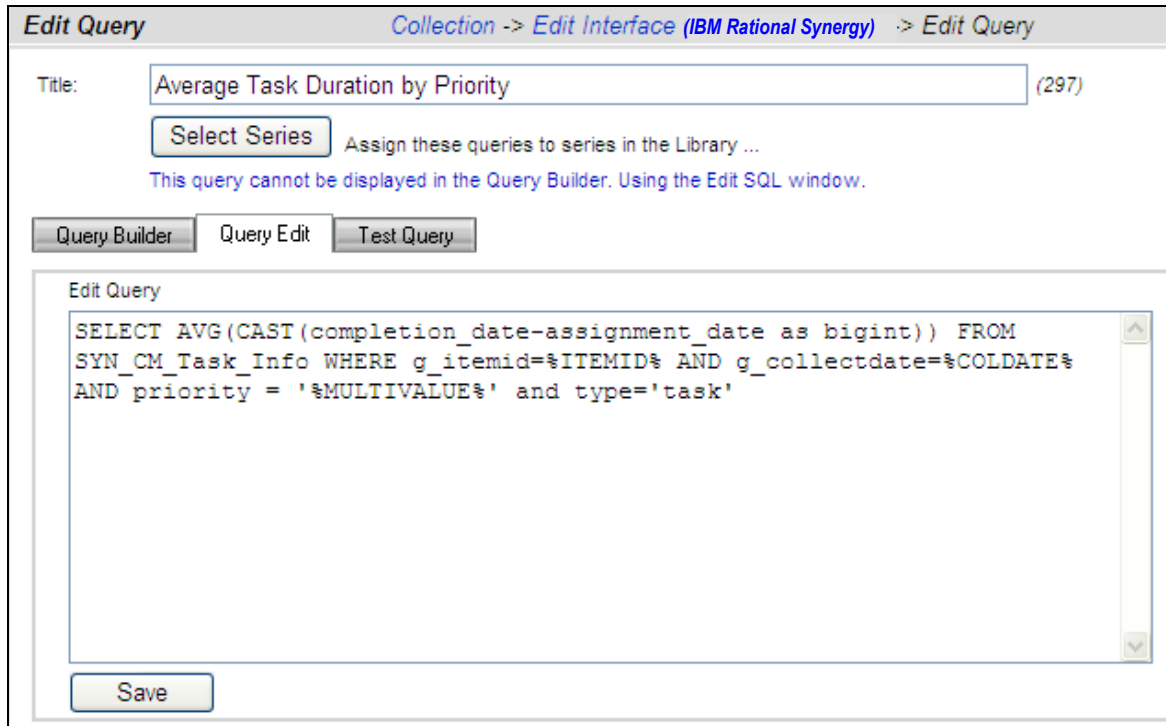
general | **fields** | queries

Queries: Add a new single series query to this interface ...
 Add a new multiple series query to this interface ...
 Assign these queries to series in the Library ...

		Name	Type
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Average Task Duration by Priority	MultipleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Avg Effective Duration	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Developer Grid	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Max Effective Duration	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Min Effective Duration	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	New Object Versions	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Files Changed	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Files Changed Cum	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Objects	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Tasks	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Tasks Completed	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Tasks in Progress	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Number of Tasks Started	SingleSeries
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	Percent Rework by Developer	MultipleSeries
<input type="button" value="Edit"/>	<input type="button" value="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. For complex queries (those that use SQL terms not supported by the Query Builder), you must use the Query Edit sub-tab. The Query Edit sub-tab provides a **text field** for maintaining the SQL statements.

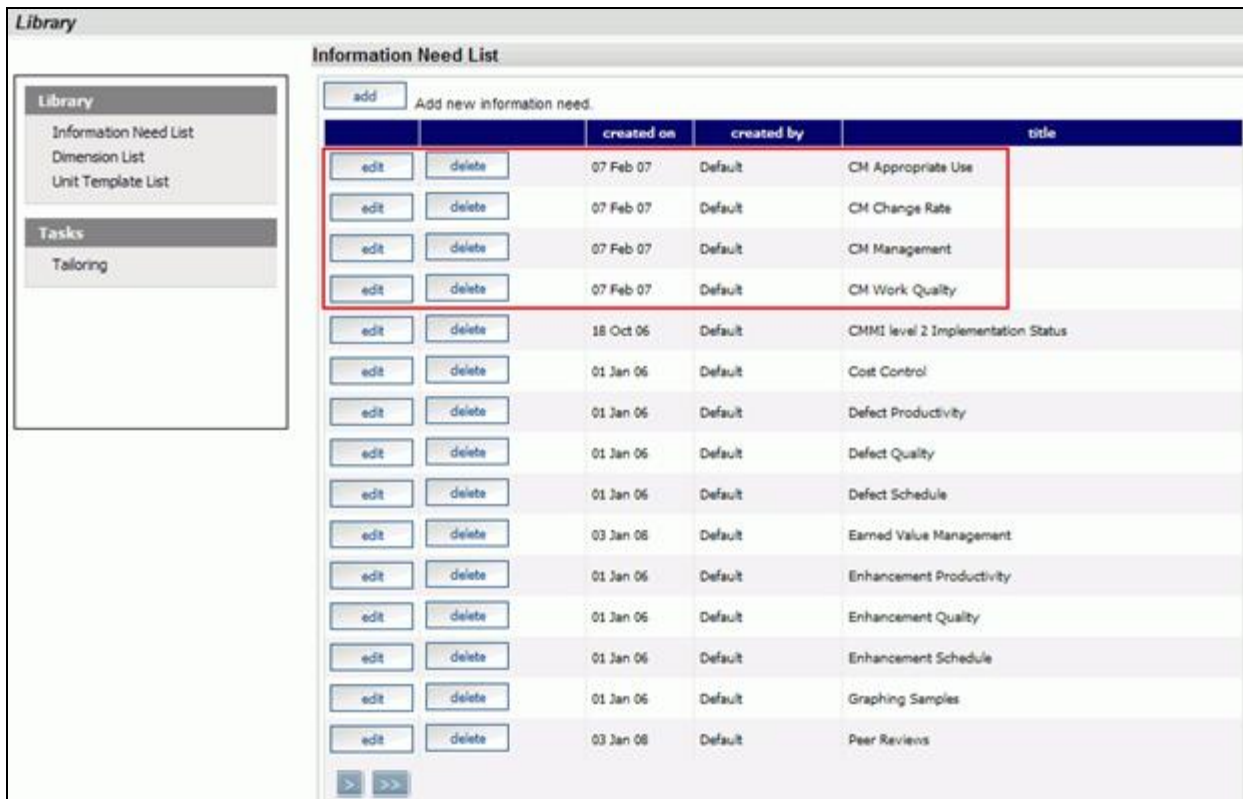


If you change the query, be sure to press **save**.

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 IBM Rational Synergy automatically. They are: CM Appropriate Use, CM Change Rate, CM Management and CM Work Quality.



The screenshot shows the 'Library' tab in IBM Rational Synergy. On the left, there is a sidebar with 'Library' and 'Tasks' sections. The 'Library' section contains 'Information Need List', 'Dimension List', and 'Unit Template List'. The 'Tasks' section contains 'Tailoring'. The main area is titled 'Information Need List' and contains a table with columns for 'created on', 'created by', and 'title'. The table lists various information needs, with the first four highlighted in red: 'CM Appropriate Use', 'CM Change Rate', 'CM Management', and 'CM Work Quality'. Each row has 'edit' and 'delete' buttons. At the top of the table, there is an 'add' button and the text 'Add new information need.' At the bottom of the table, there are navigation arrows.

		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 06	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 06	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 'Information Need' dialog box with the 'general' tab selected. The title is 'CM Appropriate Use' with a count of '(67)'. The state is set to 'defined'. The description reads: 'The CM Appropriate Use information need contains graphs to track the usage, size, and updates within a project.' It also shows creation and update dates, a 'Review and Synchronize' button, and 'Save' and 'Cancel' buttons at the bottom.

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 'Information Need' dialog box with the 'graphs' tab selected. It displays three dropdown menus for 'Current Actual', 'Current Plan', and 'Current Status'. Below these, it states '5 graphs defined.' and provides buttons for 'Edit', 'Delete', 'Add', and 'Add new graph ...'. A list of five graphs is shown: 'Average Task Size (Run)', 'Developer Workspace Last Update (SnapshotGrid)', 'Percent Objects With 2 or More Previous Versions (Run)', 'Task Size Cumulative (Run)', and 'Workspace Update Aging (VerticalBar)'. The bottom of the dialog includes 'Save', 'Cancel', and a checkbox for 'Set the update date to current date and time during save?'.

Assigning Interface Queries to a Library Series

To enable data to be populated in a series, each series must have one or more interface queries associated with it. Once a query is associated with a series, the query is run after data collection to provide a data point for the series. Because a graph in the library is not specific to one interface (that is, a graph may have more than one interface that can provide data for it), you may select multiple interface queries for one series. So, you may assign a query from more than one interface to the same series in the Library. When the graph (that contains the series) is created in a Unit, the associated interface query is used.

For series with a data source of single-series or multi-series, you will see the number of Interface queries that have been assigned, and you can click on the "Select Queries" button to assign queries. If the Select Queries button is not enabled, make sure the source is single-series or multi-series (as appropriate) and then press the Save button. To simplify the process, the Portal provides you with the ability to either 1) assign series to queries or 2) assign queries to series. You can access this from either the Library Graph page (see next image) or the queries subtab in the Edit Interface page.

The screenshot shows the 'Library Graph' interface with the 'series' subtab selected. The breadcrumb path is 'Library -> Information Need (CM Appropriate Use) -> Graph (Average Task Size)'. The interface is divided into two main sections: a list of queries on the left and a configuration panel on the right.

Query List (Left):

- Average Files per Task (actual data)
- Number of Files Changed (actual data)** (highlighted)
- Number of Tasks (actual data)

Configuration Panel (Right):

- Title:** Number of Files Changed (751)
- Type:** Alarm Data Region Text
- Duration:** Actual Plan Forecast
- Use:** Normal Primary X/Status Value Primary Y
- Is hidden?** **Order:** 1
- Source:** manual single series query multi-series query equation
- Select Queries:** 1 queries have been assigned to this series.
- Edit Equation:** (button)

Sample Data: normal curve (dropdown) Peak value 33

Buttons: Add, Delete, Save, Cancel

The Assign Series to Queries page allows you to assign one or more queries to a series in the Library. This page has two subtabs described below. Once you are done with the assignment, use the breadcrumbs at the top of the page to return to previous page.

On the “to query” subtab, you may select a series from the Library (select an information need and then a graph/series from the drop downs) and then review a list of Interface queries, if any, that have been assigned to the series. You may select an interface from the (lower) dropdown, and then assign one of the Interface queries to the currently selected series. This subtab is designed to review all the interfaces that a single series has been assigned to.

Assign Series To Queries *Library -> Information Need (CM Appropriate Use) -> Graph (Average Task Size) -> Assign Series To Query*

Information Need:

Series:

Assigned Queries: This series has been assigned to 1 interfaces.

	Interface	Query
<input type="button" value="Unassign"/>	IBM Rational Synergy	Number of Files Changed

Select an Interface then press 'Assign' to indicate a query can provide data for this series.

Interface Queries:

	Query	
<input type="button" value="Assign"/>	Object Type-Comments	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Object Type-Headings	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Object Type-Requirements	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Requirements Added	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Requirements Allocation	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Requirements Approval Status	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Requirements Completed	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Requirements Modified	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	Requirements Total	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	TBD Count	<input type="button" value="Edit Query"/>
<input type="button" value="Assign"/>	User Requirements Total	<input type="button" value="Edit Query"/>

On the “to series” subtab, you may select an information need and interface and then assign or un-assign the series to queries as needed.

This subtab is designed to help assign all the queries in an interface at one time to the series in one information need. Below, the “Number of Files Changed” query from the Synergy interface has been assigned to the “Number of Files Changed” series of our graph. Notice that the button on the appropriate column (below) now says “Unassign” indicating that has already been assigned.

Assign Queries To Series [Library -> Information Need \(CM Appropriate Use\) -> Graph \(Average Task Size\) -> Assign Query To Series](#)

to series to query

Information Needs: Interfaces:

Series	Query	
no selection	Average Task Duration by Priority	Assign
no selection	Avg Effective Duration	Assign
Developer Workspace Last Update\Actual	Developer Grid	Unassign
no selection	Max Effective Duration	Assign
no selection	Min Effective Duration	Assign
no selection	New Object Versions	Assign
Average Task Size\Number of Files Changed	Number of Files Changed	Unassign
Task Size Cumulative\Number of Files Changed	Number of Files Changed Cum	Unassign
Percent Objects With 2 or More Previous Versions\Number of Ob	Number of Objects	Unassign
Average Task Size\Number of Tasks	Number of Tasks	Unassign
no selection	Number of Tasks Completed	Assign
no selection	Number of Tasks in Progress	Assign
no selection	Number of Tasks Started	Assign
no selection	Percent Rework by Developer	Assign
no selection	Percent Rework by Release	Assign
no selection	Rework Tasks	Assign

Once you are done with the assignment, use the breadcrumbs at the top of the page to return to previous page.

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.

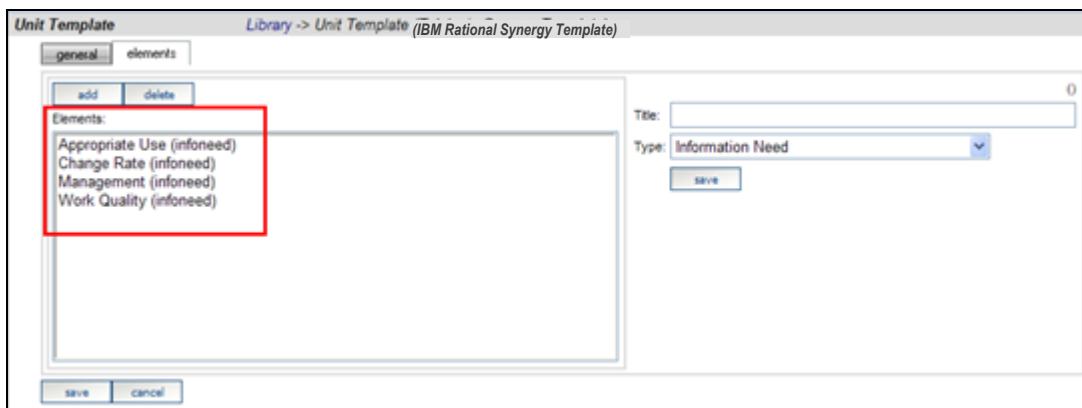
To include a schedule in a template, go to the **Library** tab. Select the **Unit Template List** from the Library section on the left hand side of the page. This will open a list of templates currently available for use.



The screenshot shows the 'Library' interface. On the left, a sidebar contains 'Library' and 'Tasks' sections. Under 'Library', 'Unit Template List' is highlighted with a red box. The main area displays a table titled 'Unit Template List' with columns for 'created on', 'created by', and 'title'. Each row has 'edit' and 'delete' buttons. The last row, 'IBM Rational Synergy Template', is highlighted in green.

		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	IBM Rational Change Template
edit	delete	01 Jan 06	Default	IBM Rational DOORS Template
edit	delete	07 Feb 07	Default	IBM Rational Synergy Template

Select the **edit** button beside IBM Rational Synergy 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 'IBM Rational Synergy Template'. The 'elements' subtab is selected. A list of elements is shown in a box, with 'Appropriate Use (infoeed)', 'Change Rate (infoeed)', 'Management (infoeed)', and 'Work Quality (infoeed)' listed. The 'Type' dropdown is set to 'Information Need'. A red box highlights the list of elements.

Elements:

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

Title:

Type: Information Need

save

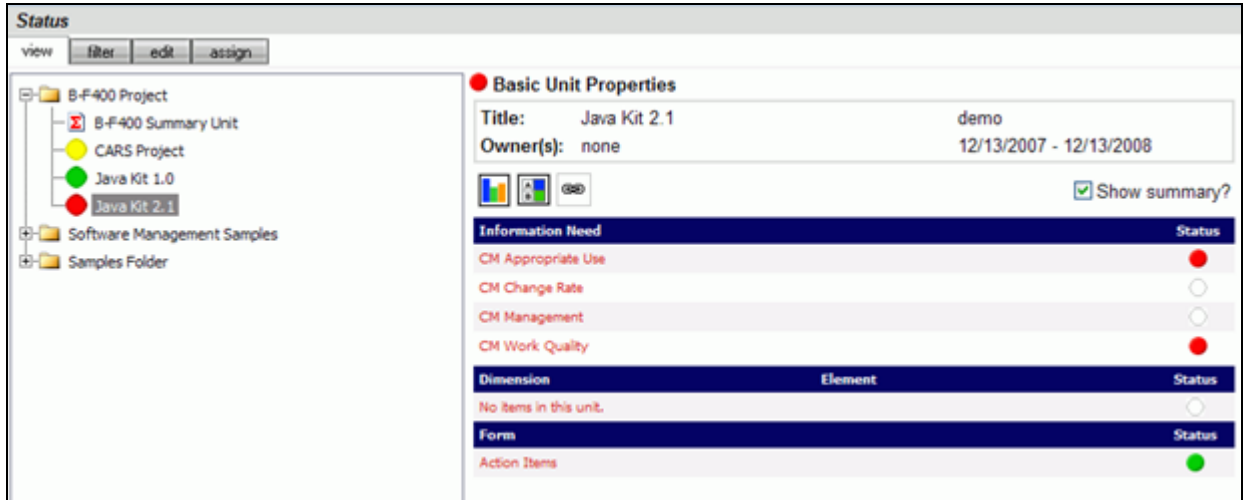
Select the **add** button and enter the **Title**. Select **Default Schedule** from the drop down list for the **Type** field and select the desired schedule from the **Schedule** drop down list.

The screenshot shows a software interface window titled "Unit Template" with a subtitle "Library -> Unit Template (IBM Rational Synergy Template)". The window has two tabs: "general" and "elements", with "elements" being the active tab. At the top left of the "elements" tab are "Add" and "Delete" buttons. Below them is a list of elements: "Appropriate Use (infofeed)", "Change Rate (infofeed)", "Management (infofeed)", "Monthly Schedule (schedule)", and "Work Quality (infofeed)". The "Monthly Schedule (schedule)" item is highlighted in blue. To the right of the list are three input fields: "Title:" with the value "Monthly Schedule", "Type:" with a dropdown menu showing "Default Schedule", and "Schedule:" with a dropdown menu showing "Monthly Schedule 2008 - 2010". A "Save" button is located below these fields. At the bottom of the window are "Save" and "Cancel" buttons. The number "(63)" is visible in the top right corner of the window.

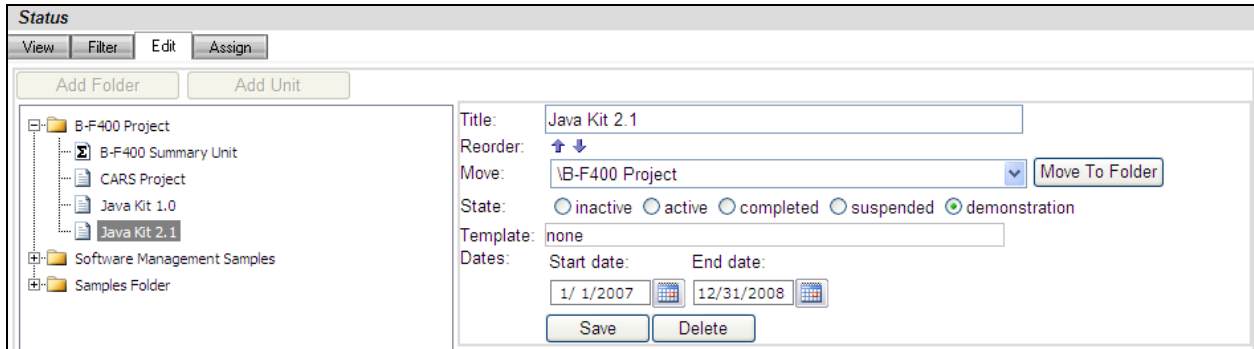
Make sure to **save** your changes.

Setup a Unit with the Synergy Template

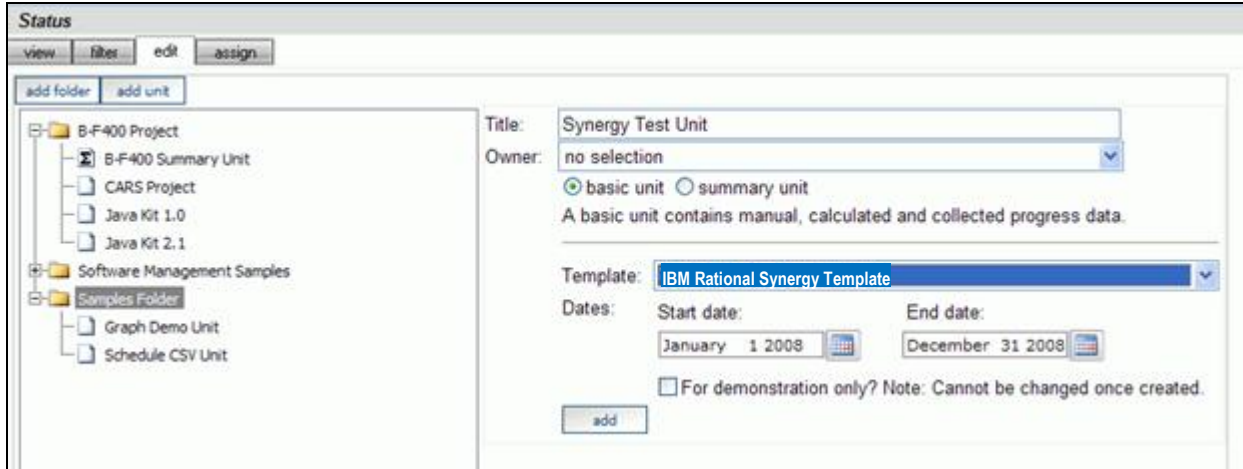
Once everything is set up correctly for the collection, the next step is to configure the Status tab to show the data results. A **unit** can be created for each project to display the data results and status for that project.



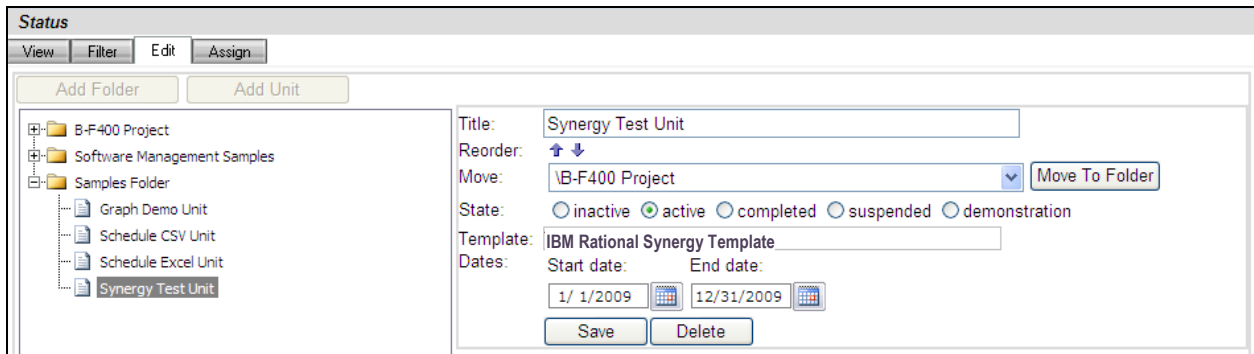
To start, click on the **Status** tab. To add a unit, click on the **edit** subtab to organize the data tree to include information on a project or projects. Create a folder, or use an existing one, and then add a unit.



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



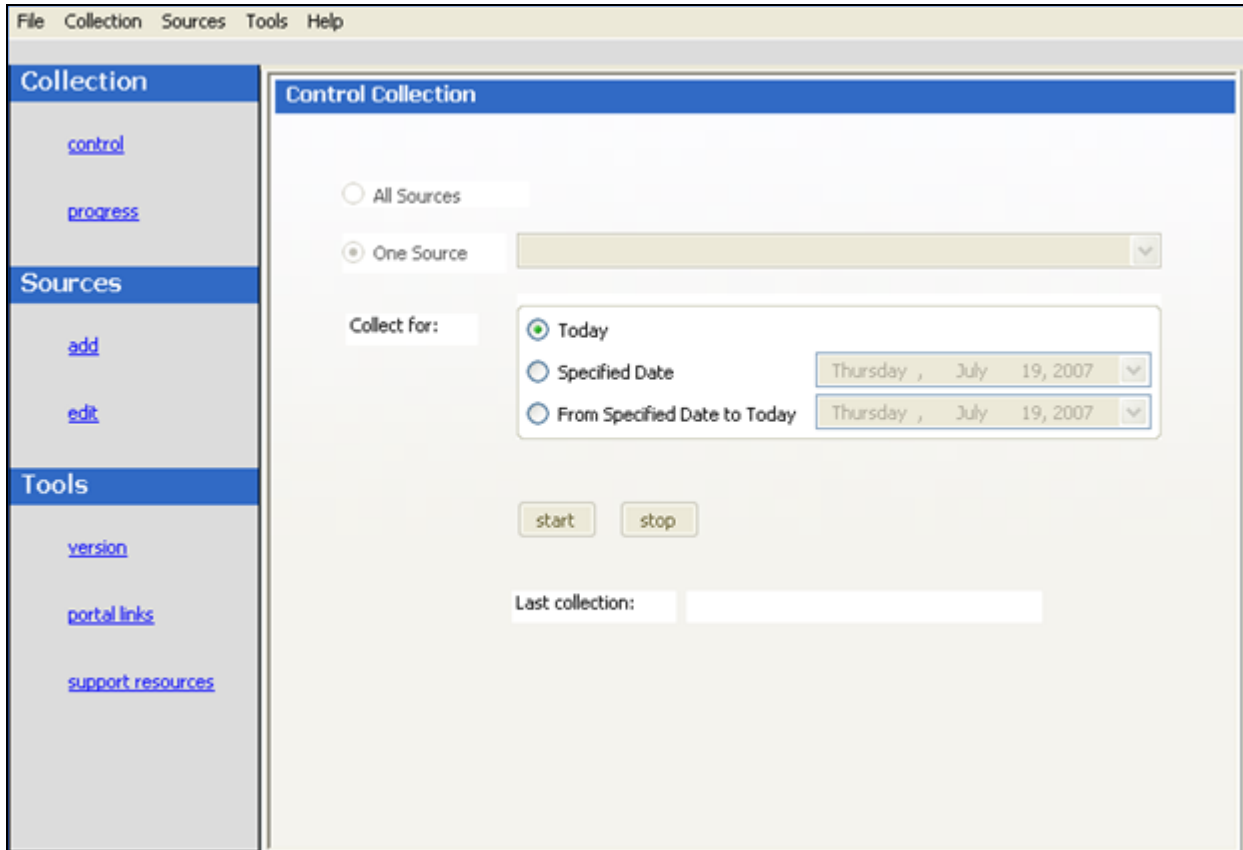
After you click the **add** button, the new unit will appear in the Status tree.



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

Configuring the Collector

Open the Collector using Start >Programs>IBM Rational>IBM Rational Dashboard>Dashboard Collector.



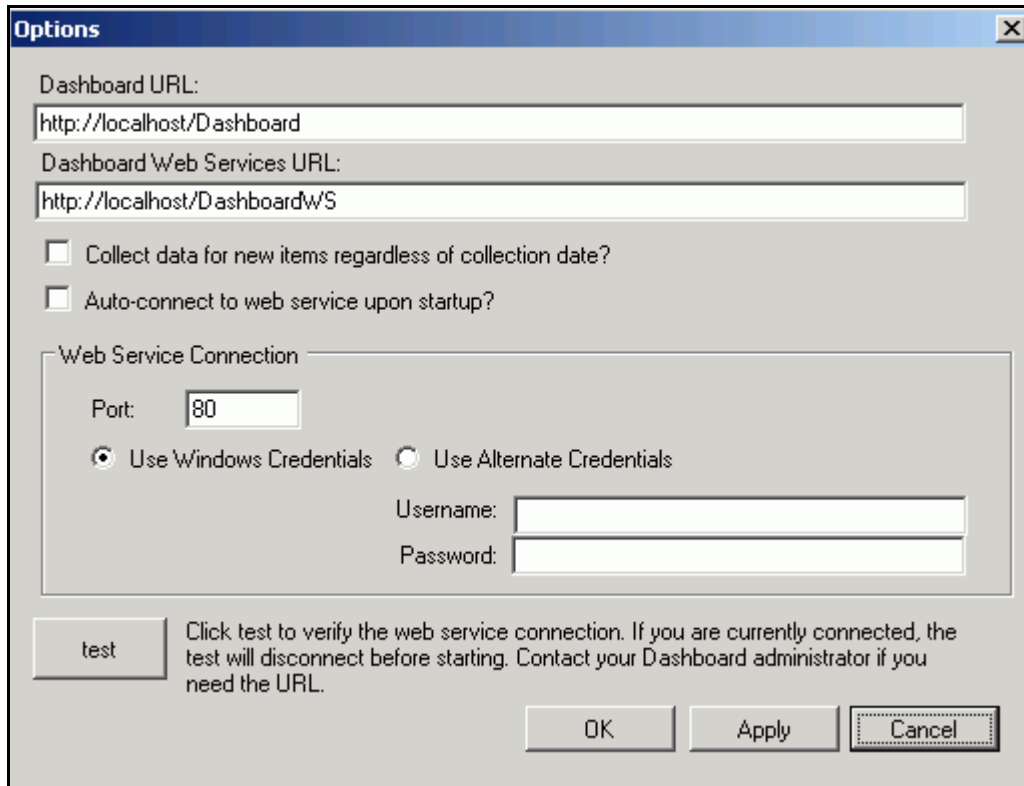
Verify Connection to Web Services

Verify Connection to Web Services

The Collector uses the 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 IBM Rational 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 IBM Rational Dashboard Portal. Be sure to click the "Apply" button if you make any changes.



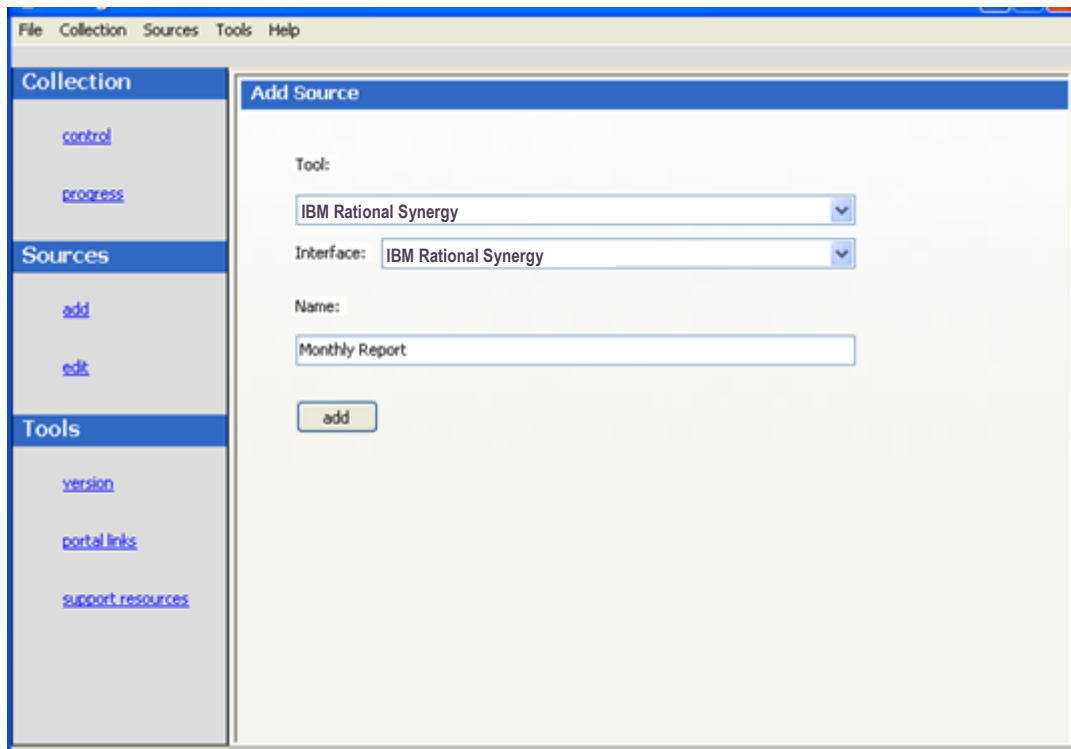
The screenshot shows the 'Options' dialog box with the following fields and controls:

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

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 IBM Rational 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.)

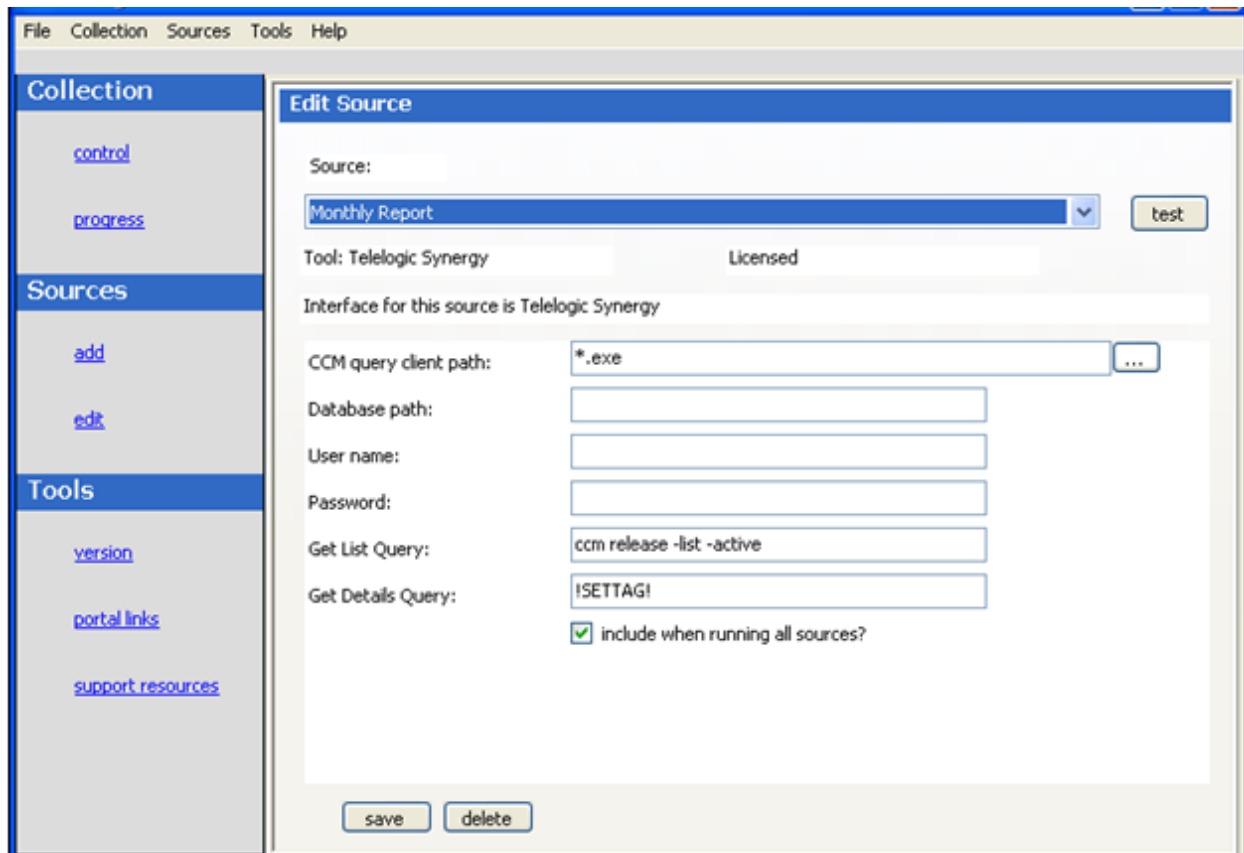


The screenshot shows a software application window with a menu bar (File, Collection, Sources, Tools, Help) and a sidebar menu. The sidebar menu is divided into three sections: 'Collection' (with links for 'control' and 'progress'), 'Sources' (with links for 'add' and 'edit'), and 'Tools' (with links for 'version', 'portal links', and 'support resources'). The 'Sources' section is selected, and the 'add' link is highlighted. The main window area is titled 'Add Source' and contains the following fields and controls:

- Tool:** A dropdown menu with 'IBM Rational Synergy' selected.
- Interface:** A dropdown menu with 'IBM Rational Synergy' selected.
- Name:** A text input field containing 'Monthly Report'.
- add:** A button located below the Name field.

Click the **add** button.

The setup for IBM Rational Synergy requires some basic log in information as well as some Portal specific information.



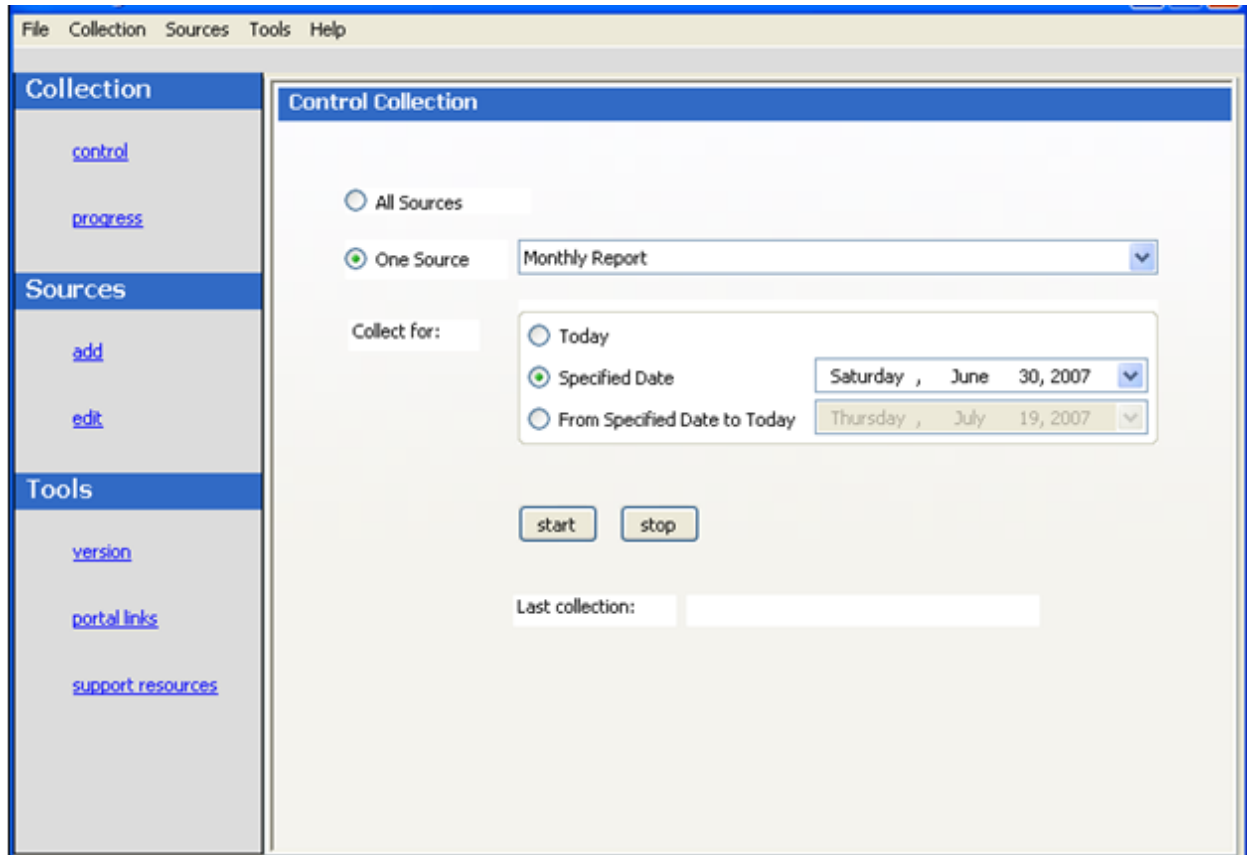
The **CCM query client path** is the location where IBM Rational Synergy is installed on the local machine. The **Database path** is the location of the IBM Rational Synergy Database. The **Username** and **Password** allows access to Synergy database.

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 IBM Rational Synergy, the !SETTAG! reserved word is replaced by ccm queries found in the field sets for the IBM Rational Synergy interface.

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

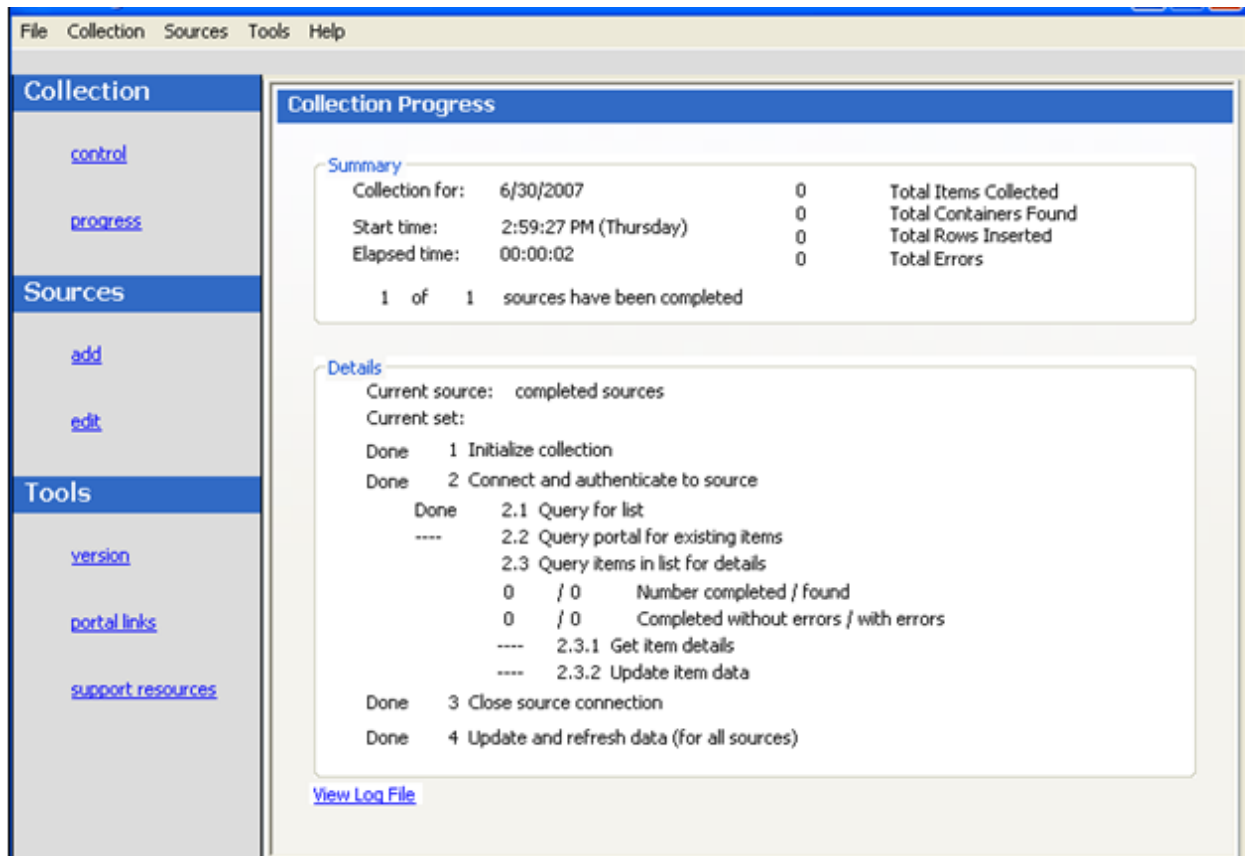
Running a Collection

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.



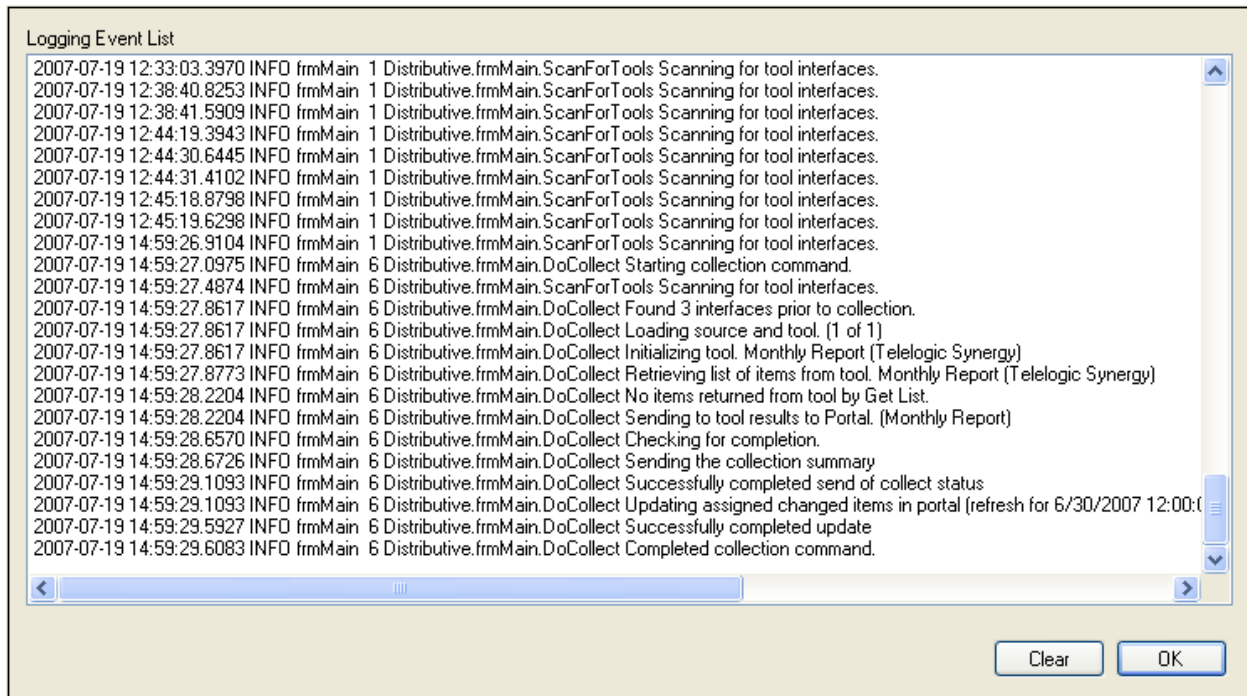
Once you've picked your source and your date, click on the **start** button.

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

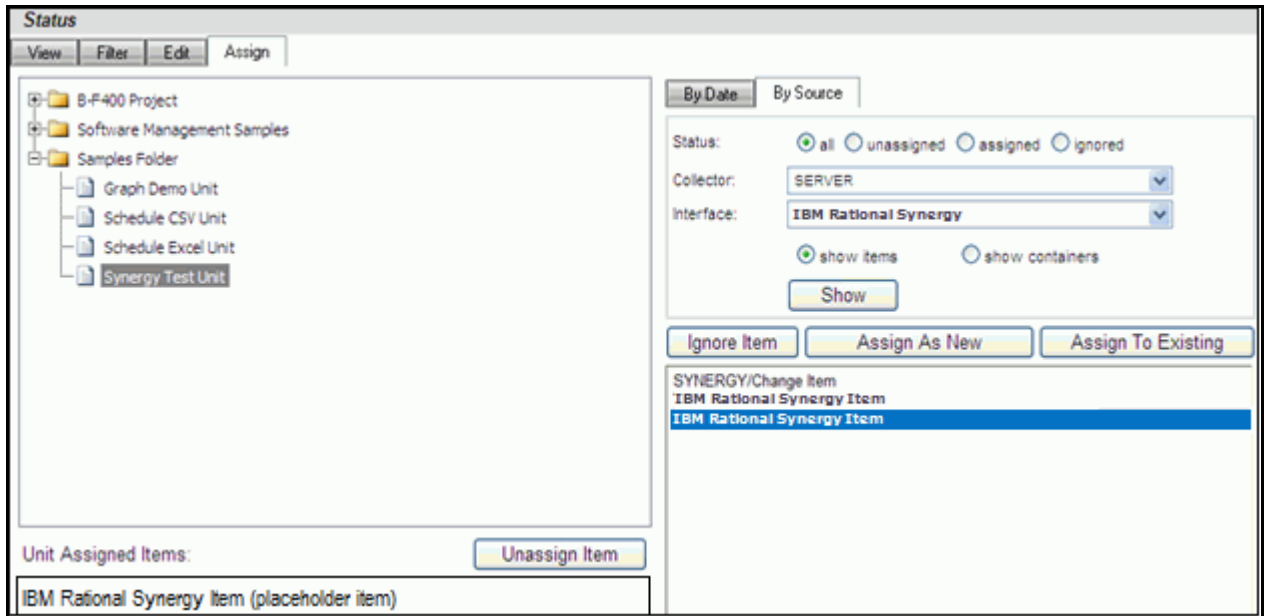
Assigning Collected Items

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 shows the 'Status' page with the 'Assign' subtab selected. On the left, a tree view shows the following structure:

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

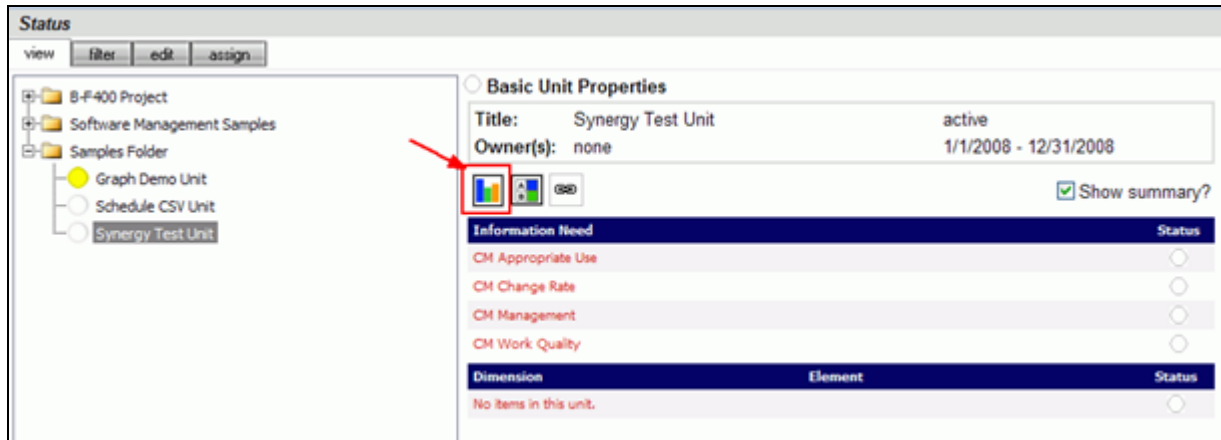
Click on the items that you want to add to this unit and then click on the **assign** button on the right hand side.



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.

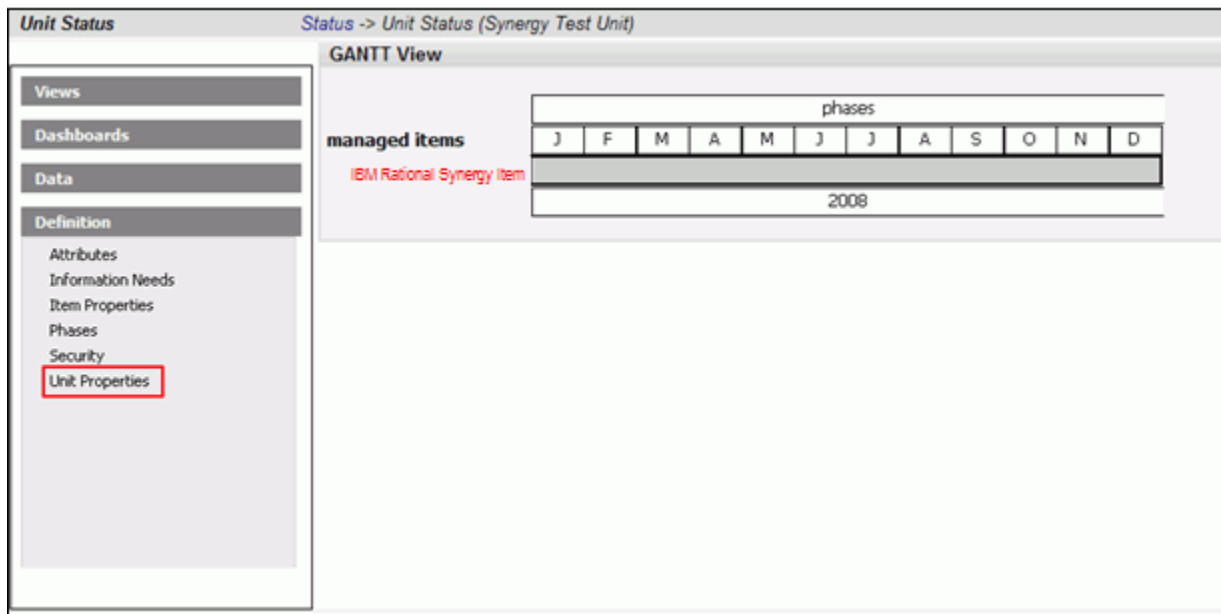


The screenshot shows the 'Status' page for a project. On the left, a tree view shows the project structure: B-F400 Project, Software Management Samples, Samples Folder, Graph Demo Unit, Schedule CSV Unit, and Synergy Test Unit. The 'Synergy Test Unit' is selected. On the right, the 'Basic Unit Properties' section shows the unit title 'Synergy Test Unit', status 'active', and owner 'none'. A red box highlights the 'Details' button (represented by a bar chart icon) and a red arrow points to it. Below the properties, there are sections for 'Information Need' and 'Dimension', each with a table of items and their status.

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 the 'Synergy Test Unit'. The page title is 'Status -> Unit Status (Synergy Test Unit)'. On the left, a navigation pane shows 'Views', 'Dashboards', 'Data', and 'Definition'. Under 'Definition', 'Unit Properties' is highlighted with a red box. The main area shows a 'GANTT View' with a GANTT chart. The chart has a header 'phases' and a timeline for the year 2008, with months J, F, M, A, M, J, J, A, S, O, N, D. A single bar is shown for 'IBM Rational Synergy Item'.

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 shows a web application interface for 'Unit Status'. The main title is 'Unit Status' and the sub-title is 'Status -> Unit Status (Synergy Test Unit)'. The interface is divided into a left sidebar and a main content area. The sidebar has a 'Definition' section with a tree view containing: Attributes, Information Needs, Item Properties, Phases, Security, and Unit Properties. The main content area is titled 'Unit Definition' and contains the following fields:

- Title: Synergy Test Unit (160)
- Owner: no selection
- State: inactive active completed suspended demonstration
- Refresh Order: 0 [Refresh] [Reload]
- Schedule: basic schedule mode advanced schedule mode
- Progress Report: no selection
- Office Template: no selection
- Dates: Start Date: 1/ 1/2009 [calendar icon] End Date: 12/31/2009 [calendar icon]
- Description: [text area]
- URL: [+] Hyperlink
- Project Stage: [text field]
- Project Plan: [text field]
- Site/Location: [text field]
- Contract/Project No: [text field]
- Customer: [text field]
- Sponsor: [text field]
- Team: [text field]
- Forms: Action Items


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.

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

Selected Unit Synergy Test Unit

Refresh series with measures for the following date range:

start: 3/27/2009 

end: 3/27/2009 

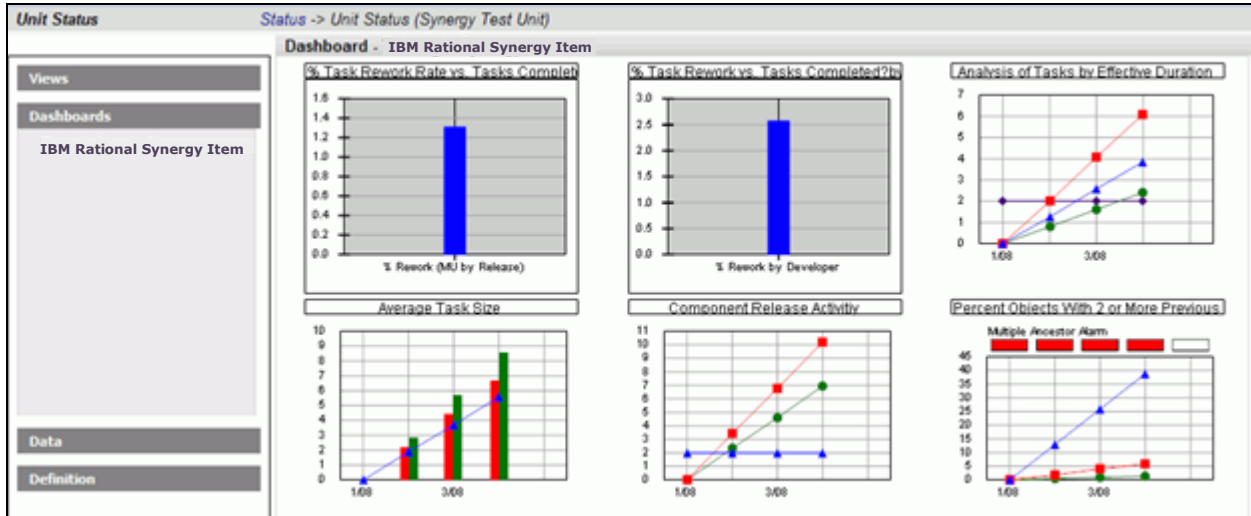
Refresh Cancel

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



Contact Information

This chapter contains the following topics:

- Contacting IBM Rational Software Support
- Prerequisites
- Submitting problems
- Other information

Contacting IBM Rational Software Support

If the self-help resources have not provided a resolution to your problem, you can contact IBM Rational Software Support for assistance in resolving product issues.

Note: If you are a heritage Telelogic customer, you can go to <http://support.telelogic.com/toolbar> and download the IBM Rational Telelogic Software Support browser toolbar. This toolbar helps simplify the transition to the IBM Rational Telelogic product online resources. Also, a single reference site for all IBM Rational Telelogic support resources is located at <http://www.ibm.com/software/rational/support/telelogic/>

Prerequisites

To submit your problem to IBM Rational Software Support, you must have an active Passport Advantage® software maintenance agreement. Passport Advantage is the IBM comprehensive software licensing and software maintenance (product upgrades and technical support) offering. You can enroll online in Passport Advantage from <http://www.ibm.com/software/lotus/passportadvantage/howtoenroll.html>.

- To learn more about Passport Advantage, visit the Passport Advantage FAQs at http://www.ibm.com/software/lotus/passportadvantage/brochures_faqs_quickguides.html.
- For further assistance, contact your IBM representative.

To submit your problem online (from the IBM Web site) to IBM Rational Software Support, you must additionally:

- Be a registered user on the IBM Rational Software Support Web site. For details about registering, go to <http://www-01.ibm.com/software/support/>.
- Be listed as an authorized caller in the service request tool.

Submitting Problems

To submit your problem to IBM Rational Software Support:

1. Determine the business impact of your problem. When you report a problem to IBM, you are asked to supply a severity level. Therefore, you need to understand and assess the business impact of the problem that you are reporting.

Use the following table to determine the severity level.

Severity	Description
1	The problem has a <i>critical</i> business impact: You are unable to use the program, resulting in a critical impact on operations. This condition requires an immediate solution.
2	This problem has a <i>significant</i> business impact: The program is usable, but it is severely limited.
3	The problem has <i>some</i> business impact: The program is usable, but less significant features (not critical to operations) are unavailable.
4	The problem has <i>minimal</i> business impact: The problem causes little impact on operations or a reasonable circumvention to the problem was implemented.

2. Describe your problem and gather background information. When describing a problem to IBM, be as specific as possible. Include all relevant background information so that IBM Rational Software Support specialists can help you solve the problem efficiently. To save time, know the answers to these questions:
 - What software versions were you running when the problem occurred?
To determine the exact product name and version, use the option applicable to you:
 - Start the IBM Installation Manager and select **File > View Installed Packages**. Expand a package group and select a package to see the package name and version number.

- Start your product, and click **Help > About** to see the offering name and version number.
 - What is your operating system and version number (including any service packs or patches)?
 - Do you have logs, traces, and messages that are related to the problem symptoms?
 - Can you recreate the problem? If so, what steps do you perform to recreate the problem?
 - Did you make any changes to the system? For example, did you make changes to the hardware, operating system, networking software, or other system components?
 - Are you currently using a workaround for the problem? If so, be prepared to describe the workaround when you report the problem.
3. Submit your problem to IBM Rational Software Support. You can submit your problem to IBM Rational Software Support in the following ways:
- **Online:** Go to the IBM Rational Software Support Web site at <https://www.ibm.com/software/rational/support/> and in the Rational support task navigator, click **Open Service Request**. Select the electronic problem reporting tool, and open a Problem Management Record (PMR), describing the problem accurately in your own words.
For more information about opening a service request, go to <http://www.ibm.com/software/support/help.html>

You can also open an online service request using the IBM Support Assistant. For more information, go to <http://www-01.ibm.com/software/support/isa/faq.html>.
 - **By phone:** For the phone number to call in your country or region, go to the IBM directory of worldwide contacts at <http://www.ibm.com/planetwide/> and click the name of your country or geographic region.
 - **Through your IBM Representative:** If you cannot access IBM Rational Software Support online or by phone, contact your IBM Representative. If necessary, your IBM Representative can open a service request for you. You can find complete contact information for each country at <http://www.ibm.com/planetwide/>.

If the problem you submit is for a software defect or for missing or inaccurate documentation, IBM Rational Software Support creates an Authorized Program Analysis Report (APAR). The APAR describes the problem in detail. Whenever possible, IBM Rational Software Support provides a workaround that you can implement until the APAR is resolved and a fix is delivered. IBM publishes resolved APARs on the IBM Rational Software Support Web site daily, so that other users who experience the same problem can benefit from the same resolution.

Other
Information

For Rational software product news, events, and other information, visit the IBM Rational Software Web site on <http://www.ibm.com/software/rational/>.

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