Rational ProjectConsole®

Getting Started

VERSION: 2002.05.00

PART NUMBER: 800-025142-000

WINDOWS

Rational®
the software development company

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U.S. Patent Nos. 5,193,180 and 5,335,344 and 5,535,329 and 5,835,701. Additional patents pending.

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Preface

Welcome to Rational ProjectConsole. ProjectConsole is a server-based application that publishes artifacts from Rational Suite and third-party tools to your project Web site. The ProjectConsole server knows where your artifacts live and how to collect, format, and present the content using customizable templates. ProjectConsole is tightly integrated with Rational Suite development tools so that it can hyperlink all project artifacts as it automatically creates and updates your project Web site.

ProjectConsole also contains a progress metrics Dashboard for your project artifacts. The Dashboard provides an easy-to-understand view of the status of your project. It provides metrics collection, analysis, and display capabilities to all practitioners and project leaders on your team. For the metrics, ProjectConsole uses automated agents to extract data from Rational Suite and third-party tools to populate a metrics data warehouse. Analysis metrics are displayed graphically using charts, tables and other GUI indicators so that you can understand the true status of the project in an instant.

About this Manual

This manual is intended for all software development team members who want to quickly learn how to use ProjectConsole to access and view project artifacts on the ProjectConsole Web site. After the administrator has installed and set up ProjectConsole on the server machine and started the ProjectConsole servers, any team member can access the Web site.

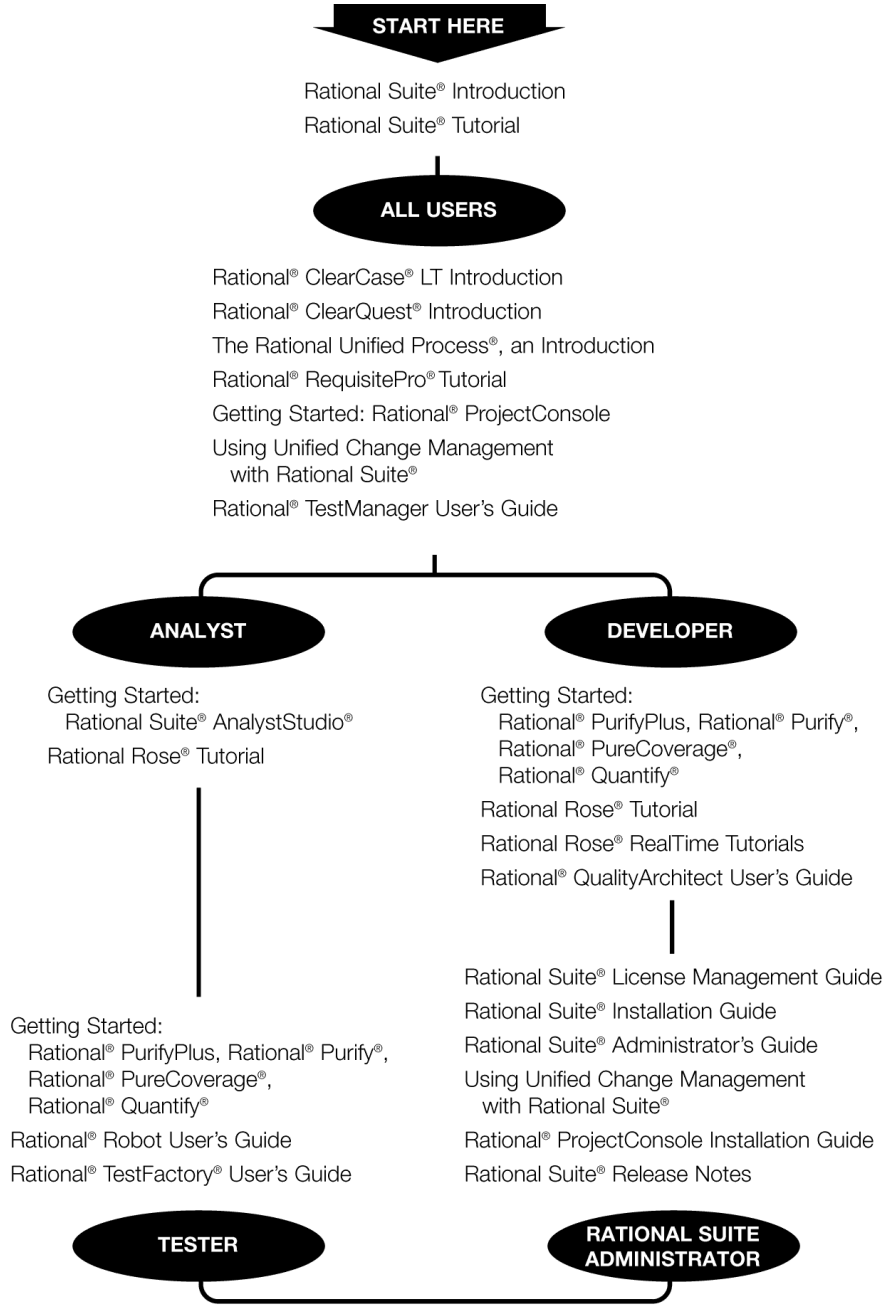
This manual contains the following chapters:

- Chapter 1, *ProjectConsole Overview*, provides an overview of ProjectConsole key features and components.
- Chapter 2, *Exploring the ProjectConsole Web Site*, contains information about client machine requirements, how to log on to the ProjectConsole Web site from a ProjectConsole client, and how to browse project artifacts.
- Chapter 3, *Commonly Asked Questions*, addresses commonly asked questions about ProjectConsole.

Other Resources

- All manuals are available online, either in HTML or PDF format. The online manuals are on the Rational Solutions for Windows Online Documentation CD.
- To send feedback about documentation for Rational products, please send e-mail to techpubs@rational.com.
- For more information about Rational Software technical publications, see: http://www.rational.com/documentation.
- For more information on training opportunities, see the Rational University Web site: http://www.rational.com/university.
- For articles, discussion forums, and Web-based training courses on developing software with Rational Suite products, join the Rational Developer Network by selecting **Start > Programs > Rational Suite > Logon to the Rational Developer Network**.

Rational Suite Documentation Roadmap



Contacting Rational Technical Support

If you have questions about installing, using, or maintaining this product, contact Rational Technical Support as follows:

Your Location	Telephone	Facsimile	E-mail
North America	(800) 433-5444 (toll free) (408) 863-4000 Cupertino, CA (800) 433-5444 Boulder, CO	(781) 676-2460 Lexington, MA (408) 863-4144 Cupertino, CA (720) 562-3019 Boulder, CO	support@rational.com
Europe, Middle East, Africa	+31 (0) 20-4546-200 Netherlands	+31 (0) 20-4546-201 Netherlands	support@europe.rational.com
Asia Pacific	+61-2-9419-0111 Australia	+61-2-9419-0123 Australia	support@apac.rational.com

Note: When you contact Rational Technical Support, please be prepared to supply the following information:

- Your name, company name, telephone number, and e-mail address
- Your operating system, version number, and any service packs or patches you have applied
- Product name and release number
- Your case ID number (if you are following up on a previously reported problem)

ProjectConsole Overview 1

Contents

This chapter contains descriptions of the key features in Rational ProjectConsole, which are organized into the following sections:

- What is ProjectConsole?
- ProjectConsole Web site
- ProjectConsole Dashboard
- ProjectConsole Dashboard Designer
- How Do I Start?

What is ProjectConsole?

Rational ProjectConsole is a Web-based product that offers reporting and metrics capabilities to software development teams. ProjectConsole gives your project manager and the entire development team access to one resource for accurate project information. With ProjectConsole, you no longer need to wait for status reports, depend on other team members for updates, base your work on outdated information, or dig through different applications, databases, directories, and documents for needed information. ProjectConsole will help you save time and reduce manual errors, and give you more control over your software development projects.

ProjectConsole provides a comprehensive set of predefined templates for Web reporting and lets you design your own custom templates. This provides your software development team with the flexibility it needs to deliver the right artifacts, in the right format, to the entire team. Each report template automatically extracts information from the Rational Suite development environment and from selected third-party tools on a specified schedule or on demand. ProjectConsole publishes the collected data to a Web site so that the entire team has a complete view of the project environment. Simplified access to project information means you spend less time looking for information, and more time improving your product.

ProjectConsole's up-to-date metrics let your software development team assess current project status and development trends. ProjectConsole collects metrics data from the Rational Suite development environment and from select third-party tools, and then stores it in the metrics warehouse. The results are presented in charts, indicators, and tables to reflect project status at a glance.

All development team members can use ProjectConsole to analyze the individual discipline metrics and drill-down to low-level details. You can visualize the planned-versus-actual metrics, trace historical data trends, and view cross-discipline metrics to get a better view across the entire project. Your software development team can realize the cause of late deliverables, take prompt corrective actions, set realistic project expectations, forecast future project milestones, and ultimately, put the entire team in a better position to objectively and accurately measure project progress and quality.

ProjectConsole performs the following tasks:

- Uses the Rational Suite Extensibility interface to automatically collect data from all Rational Suite products and third-party tools such as Microsoft Project and store it in a centralized metrics warehouse.
- Analyzes your project data and graphically presents personal and public metrics.
- Supports trend charts for viewing changes over time, and dimension charts for viewing the distribution of data over its attributes. Collected metrics data is presented in easy-to-understand graphical formats, including traffic lights and gauges that let you quickly compare collected data to threshold values.
- Lets you view the underlying data of the metrics presented in its charts and indicators. You can drill down to examine the details.
- ProjectConsole provides a common point where information from various tools is presented in a single view, based on common properties (e.g. project or iteration).

Rational ProjectConsole is included in the Team Unifying Platform of every Rational Suite product to enable collaborative project management.

The user interface for Project Console is the ProjectConsole Web site, which contains three key components: the ProjectConsole Dashboard, the ProjectConsole Dashboard Designer, and the ProjectConsole Administrator. The following sections provide information about how to Log on to the ProjectConsole Web site and descriptions of the Web site and its key components.

Accessing the Rational ProjectConsole Tutorial

The Rational ProjectConsole Tutorial provides detailed examples of how to access and use ProjectConsole components and features. The tutorial is available on any machine that has ProjectConsole installed.

To start the tutorial on a machine that has ProjectConsole installed:

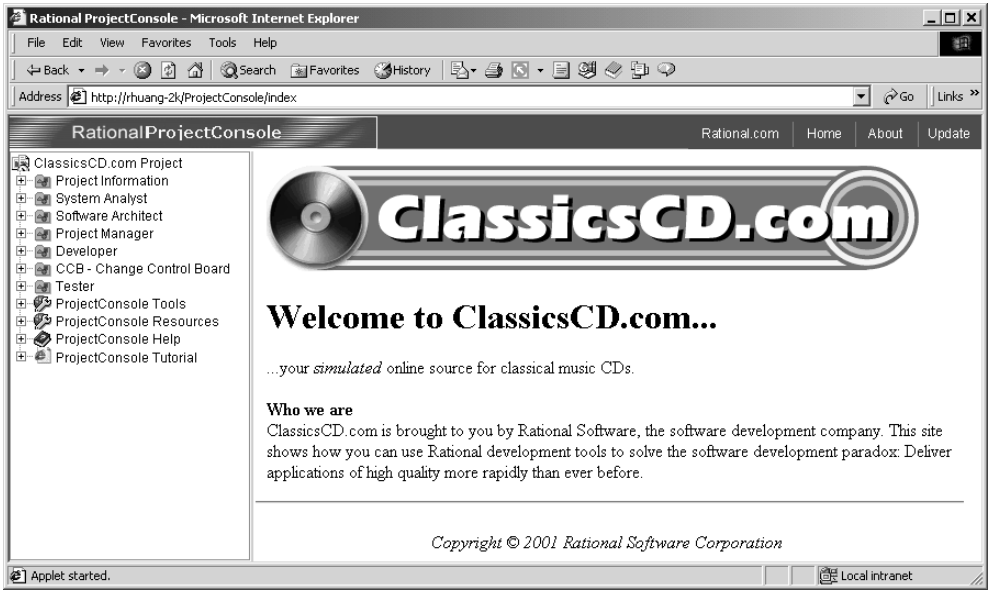
Click **Start > Programs > <RationalSuiteProductName> > Rational ProjectConsole > Rational ProjectConsole Tutorial**.

ProjectConsole Web Site

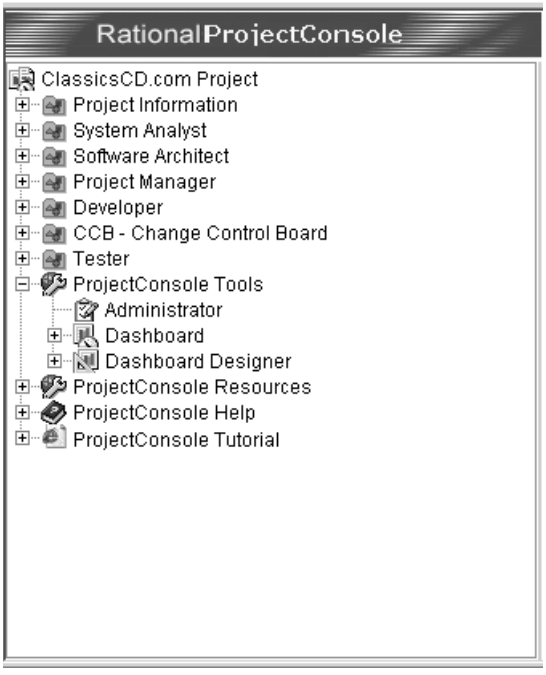
ProjectConsole automatically collects artifacts from Rational Suite products through the Rational Suite Extensibility interface and structures them into the ProjectConsole Web site. This provides a standard organization for all your project data, making it easy to find information.

The ProjectConsole Web site is the project team Web site. After your administrator sets up the ProjectConsole server, you can log on to the Web site and browse sample data. After your administrator creates and sets up a metrics warehouse specifically for your project and collects and publishes your project artifacts, you can access your team's project data on the site. For information about how to log on to ProjectConsole, see Chapter 2, *Exploring the ProjectConsole Web Site* and Section 1 of the Rational ProjectConsole Tutorial.

The following figure shows the Rational ProjectConsole Web site.



The ProjectConsole navigation tree is displayed in the left pane of the Web page. The following figure shows the navigation tree, with the ProjectConsole Tools node expanded.



ProjectConsole navigation tree

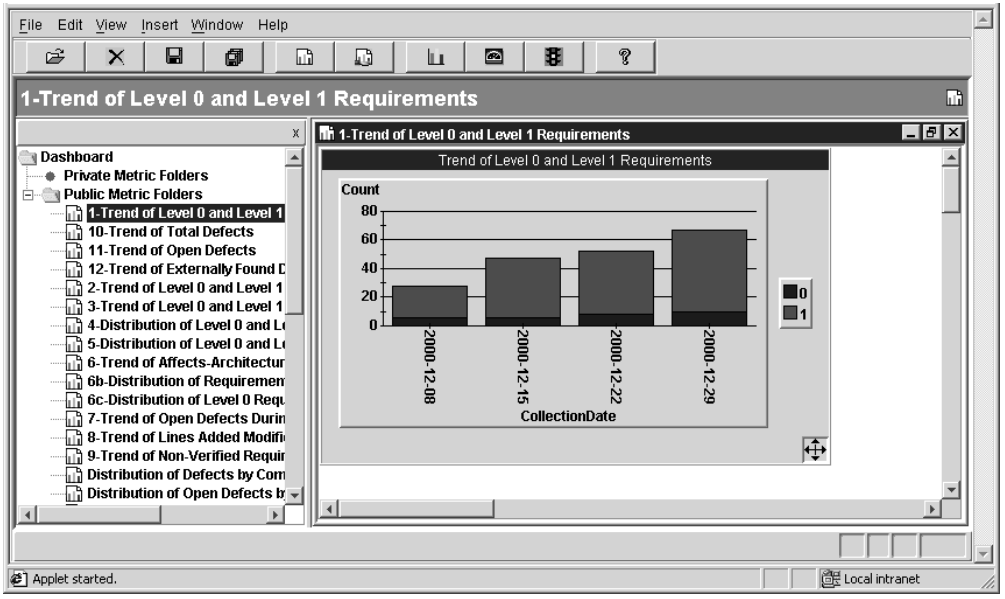
You can use the ProjectConsole navigation tree to:

- Retrieve and view project artifacts
- Access all of the ProjectConsole components, including the Dashboard, the Dashboard Designer, the Administrator
- Access Microsoft Project reports
- Access ProjectConsole Help
- Start the ProjectConsole tutorial

The remaining sections of this chapter provide brief descriptions of the key ProjectConsole components and features, as well as pointers to more detailed information.

ProjectConsole Dashboard

The ProjectConsole Dashboard is the project metrics analysis component of ProjectConsole. The Dashboard is designed for use by everyone on the project team who is involved with analyzing project metrics, including project managers, team leads, engineers, and quality assurance experts. The following figure shows the Dashboard page with sample defect data displayed.



The Dashboard displays analysis metrics graphically in charts and other GUI indicators so that you can instantly assess the true status of your project.

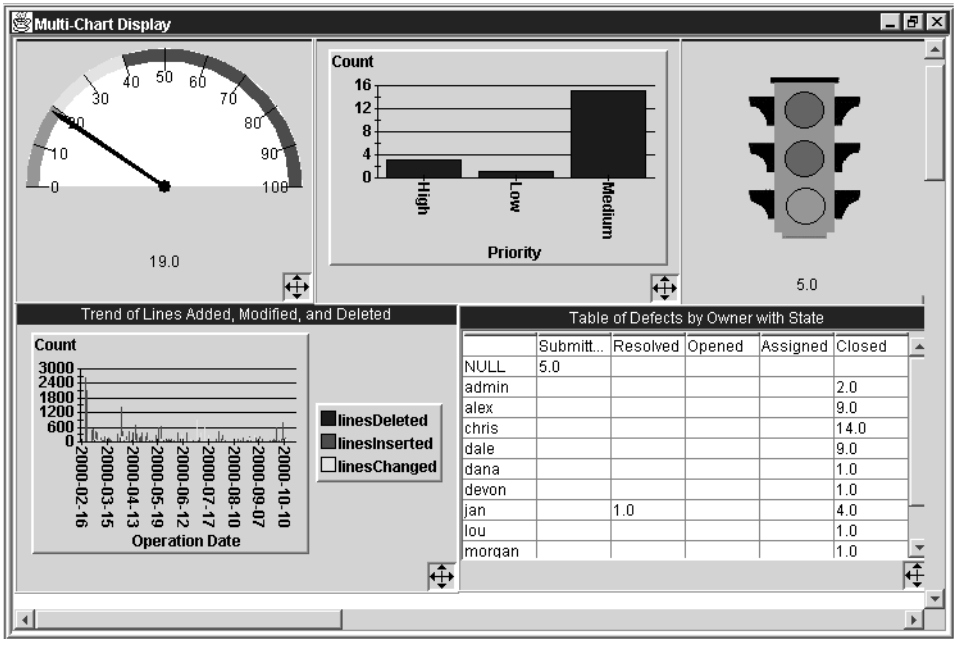
You can use the Dashboard to:

- Create and view metrics displays
- Drill down to see the detailed data on which metrics displays are based
- Change chart formats
- Create new private metrics displays for your personal viewing
- Publish metrics displays for other team members to view

The Dashboard supports two types of metric displays:

- Trend charts and distribution charts that show a range of values
- Indicators such as gauges and traffic lights that compare single values

The following figure illustrates a multi-chart view of sample project metrics displayed in the right pane of Dashboard.



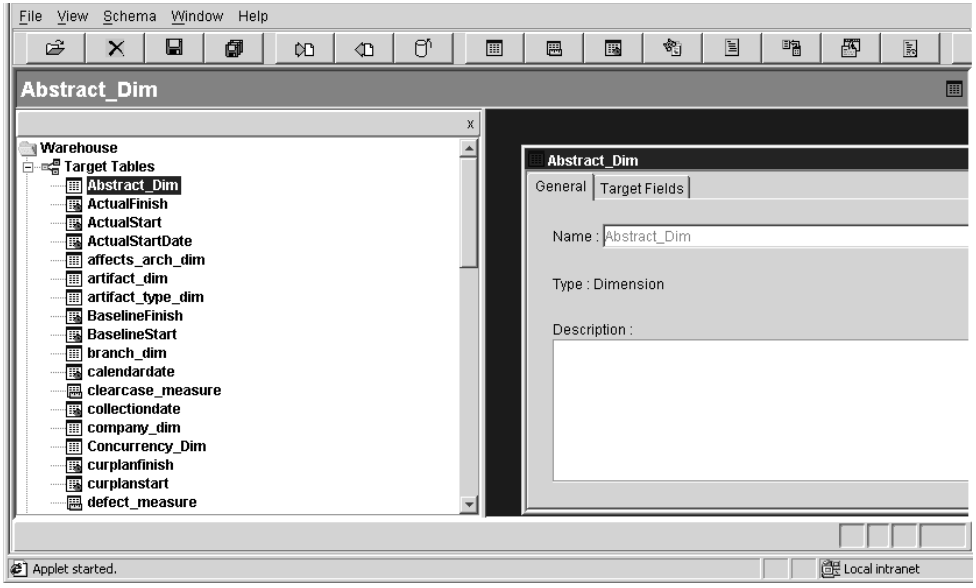
The Dashboard lets you retrieve meaningful project metrics so that your project decision-making is based on complete and current information. For detailed information about how to use the Dashboard, see ProjectConsole Dashboard Help and Sections 3 through 9 of the Rational ProjectConsole Tutorial.

ProjectConsole Dashboard Designer

The Dashboard Designer is used by administrators responsible for maintaining the metrics warehouse and scheduling tasks such as data collections. The metrics warehouse is where the data collected from your artifacts sources is stored. As a project administrator, you use the Dashboard Designer to design the metrics warehouse and set up scheduled data collection from supported development tools.

You use the Dashboard Designer to:

- Create source templates to identify project artifacts to collect
- Create a target schema to identify the warehouse tables and fields into which collected data is loaded
- Create source-to-target mappings that specify exactly how a source schema is mapped to a target schema.
- Transform collected data - Dashboard Designer can make raw data more useful by using the Perl or Visual Basic scripting language to perform useful calculations.
- Create scheduled tasks



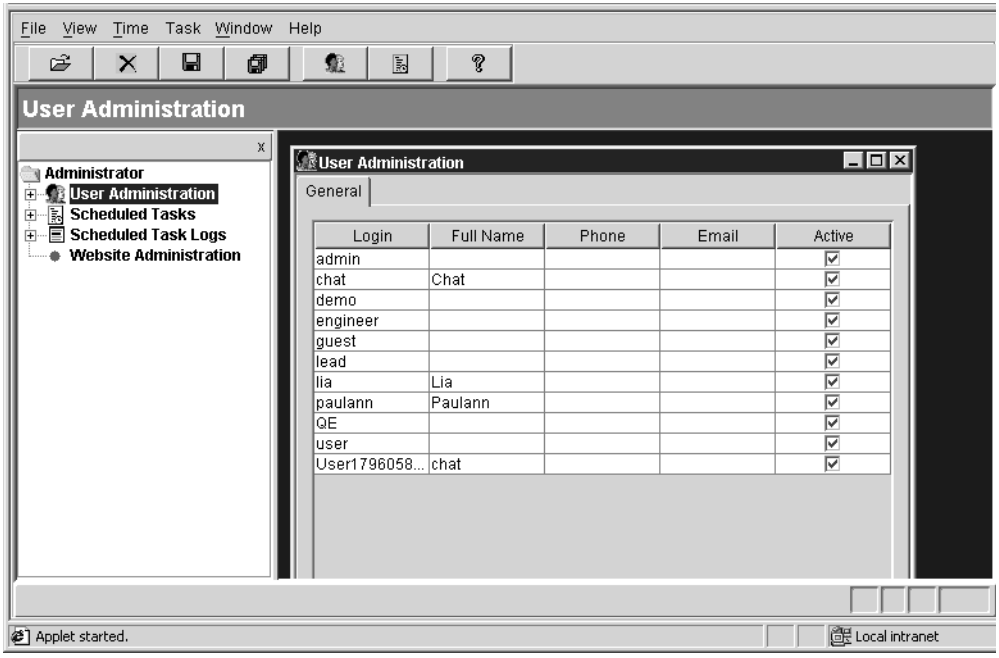
For detailed information about how to use the Dashboard Designer, see ProjectConsole Dashboard Designer Help and Sections 3 through 9 and 11 of the Rational ProjectConsole Tutorial.

ProjectConsole Administrator

Your administrator uses the ProjectConsole Administrator component of ProjectConsole to manage all aspects of the project Web site.

You use the ProjectConsole Administrator to:

- Administer ProjectConsole users
- Administer the ProjectConsole Web site
- Administer scheduled data collection and metrics publishing tasks
- Set up and monitor metrics collection from your development tools



For detailed information about how to use Administrator, see ProjectConsole Administrator Help and Sections 2 through 9 of the Rational ProjectConsole Tutorial.

How Do I Start?

This section contains recommendations on sources you can go to for more information, based on how you plan to use ProjectConsole.

To find the suggested resources in this section:

The printed manual *Installation Guide, Rational ProjectConsole* is included in the Rational Suite product package you purchased.

To start the Rational ProjectConsole Tutorial on a machine with ProjectConsole software installed, click **Start > Programs > Rational <SuiteName> > Rational ProjectConsole > Rational ProjectConsole Tutorial**.

To access ProjectConsole Maintenance Tool Help on a machine with ProjectConsole software installed:

1. Click **Start > Programs > Rational <SuiteName> > Rational ProjectConsole > Rational ProjectConsole Maintenance Tool**.
2. On the Maintenance Tool window, click **Help**.

To access ProjectConsole Help, in the ProjectConsole navigation tree, click **ProjectConsole Help**.

To access ProjectConsole Template Builder Help on a machine with ProjectConsole software installed, click **Start > Programs > Rational <SuiteName> > Rational ProjectConsole > Rational ProjectConsole Template Builder Help**.

To access Dashboard Designer Help, from the ProjectConsole Dashboard Designer page, click **Help > Contents and Index**.

To access Administrator Help, from the ProjectConsole Administrator page, click **Help > Contents and Index**.

To access Dashboard Help, from the ProjectConsole Dashboard page, click **Help > Contents and Index**.

ProjectConsole Administrators

If you are the administrator responsible for setting up the ProjectConsole server and agent software, see *Installation Guide, Rational ProjectConsole*.

If you are the administrator responsible for creating and setting up the metrics warehouse, see the following:

- *Installation Guide, Rational ProjectConsole*
- ProjectConsole Dashboard Designer Help
- ProjectConsole Maintenance Tool Help

If you are the administrator responsible for setting up automated metrics collections, see the following:

- ProjectConsole Dashboard Help
- Sections 3 through 11 of the Rational ProjectConsole Tutorial: Sections 3 through 8 are designed to guide you through gathering data and storing the artifacts in the ProjectConsole metrics warehouse. Section 9 covers publishing Dashboard metrics views into the ProjectConsole Web site. Section 10 provides guidance on how to migrate from the sample site data included with ProjectConsole to your project data. Section 11 provides guidance on how to add a field to your Metrics Warehouse.

If you are the administrator responsible for setting up the ProjectConsole Web site or you want to learn more about navigating the ProjectConsole Web site, see the following:

- Sections 2 and 12 of the Rational ProjectConsole Tutorial.
- ProjectConsole Administrator Help
- ProjectConsole Template Builder Help

ProjectConsole Client Users

If you just plan to use ProjectConsole to browse project artifacts and view project metrics, see the following:

- Chapter 2, *Exploring the ProjectConsole Web Site* in this manual
- Section 1 of the Rational ProjectConsole Tutorial

Exploring the ProjectConsole Web Site 2

Contents

From the Rational ProjectConsole Web site, you can easily access software project artifacts distributed anywhere in the world. This chapter provides information about how to log on to the ProjectConsole Web site from a ProjectConsole client machine, and how to browse sample project artifacts after you log on.

This chapter is organized as follows:

- ProjectConsole Client Requirements
- Logging On to the ProjectConsole Web Site
- Viewing Project Artifacts
- Customizing Artifact Display with ProjectConsole Template Builder

ProjectConsole Client Requirements

After the administrator sets up the ProjectConsole server, you can log on to the ProjectConsole Web site from a client machine and browse sample project data. To do this, your client machine must have:

- Microsoft Internet Explorer 5.5 or later, or Netscape 4.7x installed

  Note: Netscape 6 is not supported.

- Cookies enabled in the Web browser security settings

  For information about enabling cookies, see Help for your Web browser.

- The screen area for your monitor set to at least 1024 x 768 pixels

In addition, you must obtain the following from your ProjectConsole administrator:

- The name of the ProjectConsole server machine
- A valid user name and, if the administrator set one up, a password

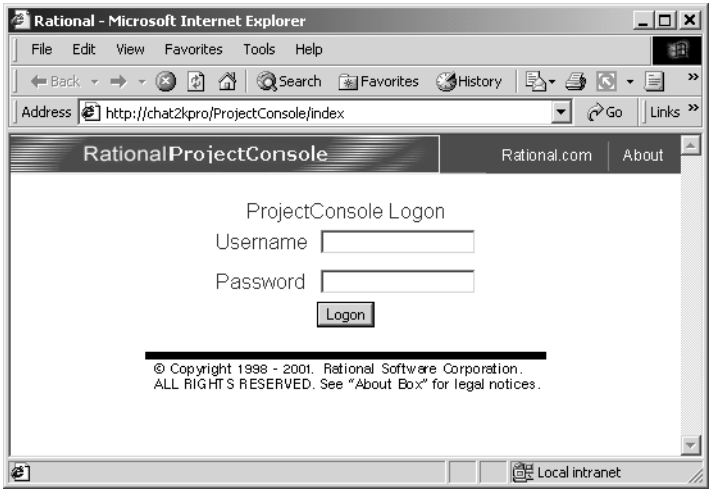
Logging On to the ProjectConsole Web Site

After you log on for the first time, you are prompted to install the Java plug-in. This section provides the information you need to log on to browse sample data.

To log on to the ProjectConsole Web site for the first time:

1 Start your Web browser, and then type the following:

http://<serverhostname>/ProjectConsole



2 On the ProjectConsole Logon page, in the **Username** box, type your user name.

3 If your administrator set up passwords, in the **Password** box, type your password. Otherwise, leave this box empty.

4 Click **Logon**.

The first time you log on, if the required Java plug-in is not already installed on the machine, you are prompted to install it.

5 Follow the instructions the install wizard provides for installing the plug-in.

6 After you install the Java plug-in, do the following:

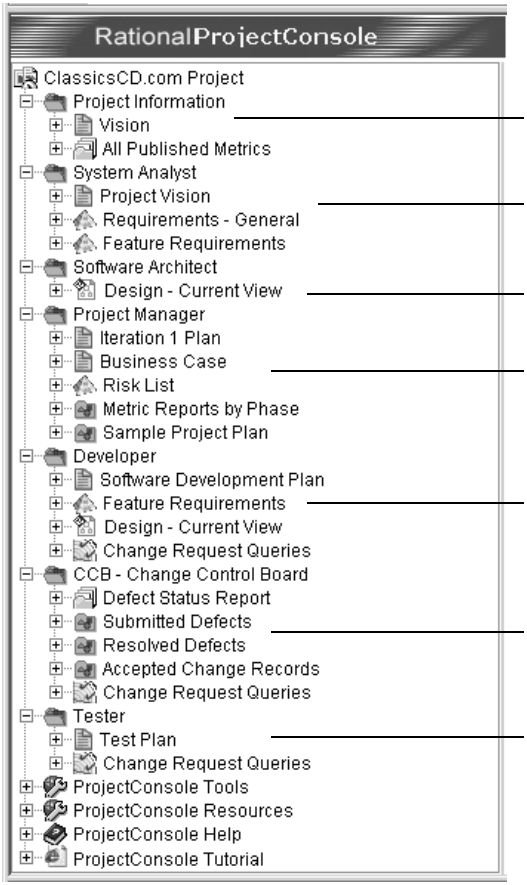
- If the client machine is running Windows NT, restart the system, and then restart the browser.
- If the client machine is running Windows 2000, quit the browser, and then restart it.

7 Log on to the ProjectConsole Web site again.

Now you can browse the ProjectConsole Web site and become familiar with its features.

Viewing Project Artifacts

The ProjectConsole navigation tree gives you access to all of the associated project artifacts, including the vision statement, published metric charts, RequisitePro requirements, Rose models, and ClearQuest change requests for your development project. Artifacts are organized in the navigation tree based on project roles. The following figure shows the navigation tree with the folders for project roles expanded to reveal the artifact nodes they contain.



All team members can access the vision document and published project metrics in the **Project Information** folder.

System analysts can access the project vision statement and project requirements in the **System Analyst** folder.

Project architects can access project design documents in the **Software Architect** folder.

Project managers can access iteration plans, business cases, the risk list, metrics reports and sample project plans in the **Project Manager** folder.

Developers can access the software developmen plan, feature requirements, design documents, ar change request queries in the **Developer** folder.

Change Control Board members can access defect status reports, defects, accepted change records, and change request queries in the **CCB - Change Control Board** folder.

Testers can access the project test plans and change request queries in the **Tester** folder.

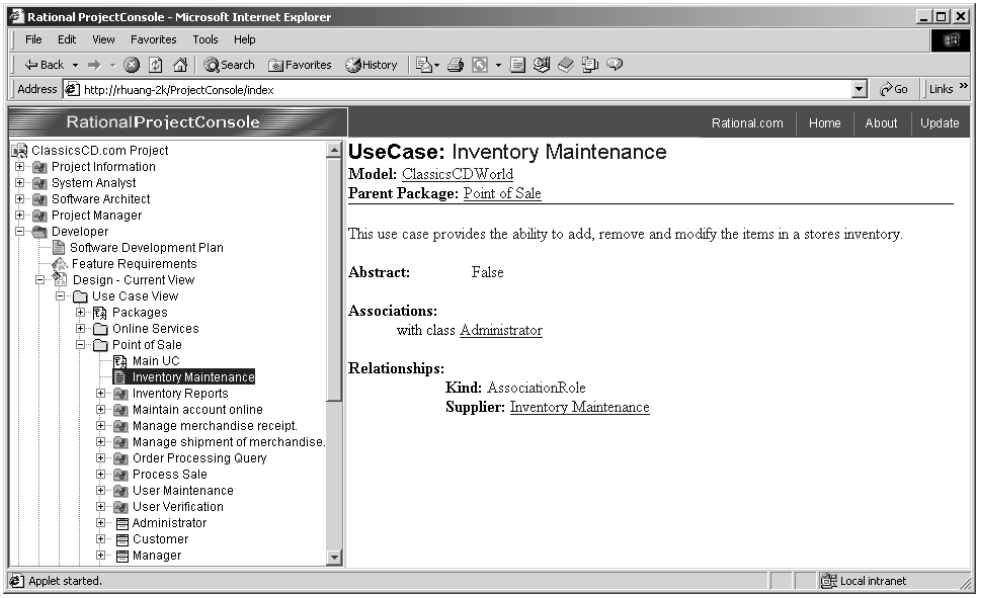
Whatever your role(s) on your development team, the navigation tree folders give you fast and easy access to the project information you need.

To access project artifacts on the ProjectConsole Web page:

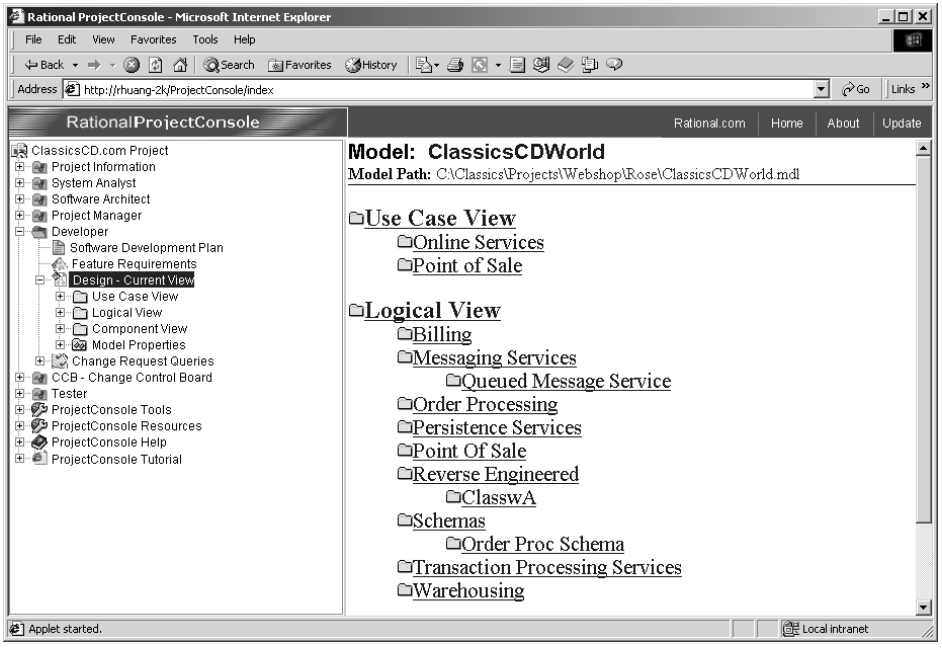
1. In the navigation tree, expand the folder for your project role. Project role folders include:
   - **Project Information**: Expand this folder to access the **Vision** and **All Published Metrics** nodes.
   - **System Analyst**: Expand this folder to access the **Project Vision**, **Requirements - General**, and **Feature Requirements** nodes.
   - **Software Architect**: Expand this folder to access the **Design - Current View** node.
   - **Project Manager**: Expand this folder to access the **Iteration Plan**, **Business Case**, **Risk List**, **Metrics Reports by Phase**, and **Sample Project Plan** nodes.
   - **Developer**: Expand this folder to access the **Software Development Plan**, **Feature Requirements**, **Design - Current View**, and **Change Request Queries** nodes.
   - **CCB - Change Control Board**: Expand this folder to access the **Defect Status Reports**, **Submitted Defects**, **Resolved Defects**, **Accepted Change Records**, and **Change Request Queries** nodes.
   - **Tester**: Expand this folder to access the **Test Plan**, and **Change Request Queries** nodes.
2. To see the artifacts of a specific type that are available for viewing, expand a node such as **Feature Requirements** or **Metrics Reports by Phase**.
3. Fully expand a few of the nodes on the navigation tree.

   Each incremental expansion leads to views that display the artifacts in finer detail than the previous level.
4. To display an artifact in the right pane, in the navigation tree, click the artifact node.

The following figure shows a portion of the **Design - Current View** node expanded several levels.



The following figure shows the ProjectConsole Web page with a project design document displayed in the right pane.



For detailed information about viewing project artifacts, see Section 1 of the Rational ProjectConsole Tutorial and Rational ProjectConsole Help.

To start the Rational Project Console Tutorial from the Web page:

- In the navigation tree, click **ProjectConsole Tutorial**.

To access Rational ProjectConsole Help from the Web page:

- In the navigation tree, click **ProjectConsole Help**.

Customizing Artifact Display with ProjectConsole Template Builder

You can easily customize the display of project artifacts by using the Rational ProjectConsole Template Builder. Template Builder is a Microsoft Word 2000 add-in that supports template creation for generating Web pages. Template Builder lets you build templates that automate the collection of project artifacts for display on your ProjectConsole Web site.

Template Builder is installed automatically during ProjectConsole installation. You can start it on any machine that has ProjectConsole software installed.

The ProjectConsole agents that collect project data from your development tools can use Template Builder templates in the collection process. You can use any of the predefined templates that come with Template Builder, or use Template Builder to build templates suited to your specific needs.

To start Template Builder and explore its features:

1. Click **Start > Programs > Rational <SuiteName> > Rational ProjectConsole > Rational ProjectConsole Template Builder**.

   Word 2000 starts with the **ProjectConsole** menu displayed in the menu bar.

2. To open the Template View window, click **ProjectConsole > Template View**.

3. To see detailed information about how to use the Template View to build templates, click **Help > Help on Template Builder**.

For detailed information on how to use Template Builder to customize artifact display on the ProjectConsole Web site, see:

- Rational ProjectConsole Template Builder Help.
- Sections 2 and 12 of the Rational ProjectConsole Tutorial

Commonly Asked Questions 3

Contents

This chapter addresses commonly asked questions about ProjectConsole. This material is organized into the following topics:

- Using ProjectConsole with third-party tools
- Publishing project results for remote access
- Administering ProjectConsole
- Using ProjectConsole templates
- Internal use of ProjectConsole at Rational
- ProjectConsole and UNIX
- Examining code changed from within ProjectConsole
- Required Web server
- ProjectConsole metrics algorithms
- ProjectConsole and ClearCase LT
- Automatic email notifications

Using ProjectConsole with Third-Party Tools

From what third-party tools can Rational ProjectConsole collect data?

Out of the box, Rational ProjectConsole can collect directly from Microsoft Project™, Microsoft Word™, the File System, and from structured (for example, CSV) text files.

How do I integrate with third-party tools using the text files?

Text files should have some kind of structure. For example, a keyword can identify a line containing metric values and attributes. Separate the values and attributes in text files using commas, tabs, or spaces.

How do I extract data from Rational ProjectConsole to import into another tool?

Data can be published in tables and exported in HTML format. You can then import the HTML-formatted data. You can use Microsoft Excel™ 2000 to import the HTML table format directly for display in Microsoft Excel tables.

You can also extract data from the metrics warehouse using transformation scripts written in Perl or Visual Basic.

Publishing Project Results for Remote Access

If I publish results to the ProjectConsole Web site, can anyone at a remote site get access to the results from the Web?

Yes. If you choose to make the URL available through your firewall, anyone can access the published results. A login procedure is required to access the ProjectConsole Web site.

Administering ProjectConsole

What is the required skill set for the Rational ProjectConsole administrator?

If you can set up Rational ClearQuest Web, you can most likely set up Rational ProjectConsole. You must also be able to set up a database. In addition, if you plan to make changes to the metrics warehouse, a good understanding of data warehousing schemas, particularly star schemas, is helpful.

How much administration is involved in administering ProjectConsole?

The amount of administration involved in using ProjectConsole depends on the project. If you choose to deploy only the sample metrics in your production environment, you could set this up in less than one week, and then spend only a couple of hours a week to monitor collections and make any changes to the Web site or metrics. However, after you put Rational ProjectConsole in production, folks in your company might want to change the information displayed on the Web site or the metrics collected, so you need to staff to accommodate the expected change requests. More of the 'admin' time is probably spent implementing 'requested enhancements' than in just fine-tuning the system.

Using ProjectConsole Templates

To use out-of-the-box templates, do I have to follow specific naming or structure conventions in setting up and using the Rational products?

Yes and no. ProjectConsole templates are generic and do not follow specific naming or structure conventions for sources such as Rational Rose™, where the objects (such as packages, classes, attributes, operations, etc.) are well-defined. However, for sources such as Rational ClearQuest™, for which you may modify the schema (remove existing fields, change the name of fields, and so on), you may have to modify the template if you make a change to the schema.

How are ProjectConsole templates created and maintained?

ProjectConsole templates are created and maintained using the Rational ProjectConsole Template Builder, a Microsoft Word™ add-in. The templates are stored in Word.doc format and also saved as HTML pages. ProjectConsole's Web Reporting then uses the HTML page to generate the pages you see in the ProjectConsole Web site.

Internal Use of ProjectConsole at Rational

Does Rational use Rational ProjectConsole internally? For what kind of projects? Have any experiences from these projects been published?

We collect metric data from all Rational business units on daily basis. Some business units have also deployed the Portal / Web Reporting capabilities. Based on the experience we have gained from this internal usage, we have come up with: (1) a set of 16 sample metrics from Rational RequisitePro™, Rational ClearQuest and Rational ClearCase™, with associated guidelines for how they are used in each of the four Rational Unified Process™ phases; (2) a white paper that describes the sample metrics and how they are used at Rational.

ProjectConsole and UNIX

Is Rational ProjectConsole available on UNIX?

Rational ProjectConsole is currently not supported on UNIX.

Can we use Rational ProjectConsole if we use Rational ClearCase VOBs on UNIX, or Rational ClearQuest on UNIX or Rational ClearQuest database on UNIX, but have all Windows clients?

Rational ProjectConsole servers and collector agents must run on Windows. You can collect from Rational ClearCase VOBs using Rational ClearCase interoperability. You can also collect artifacts from Rational ClearQuest on UNIX using a Rational ProjectConsole ClearQuest provider agent running on Windows.

Examining Code Changed from within ProjectConsole

Can I drill down on lines of code changed within Rational ProjectConsole?

Yes, assuming that you collect this information from Rational ClearCase. The sample metrics will provide you with the framework to do collections and view the metrics.

Required Web Server

What type of Web server is required to support Rational ProjectConsole?

You can use Jakarta-Tomcat™, which is included with the Rational Suite products. Alternatively, you can use Microsoft IIS™ 4.0 or 5.0. However, you still must use Tomcat as the servlet container.

ProjectConsole Metrics Algorithms

Will Rational publish the ProjectConsole metrics algorithms?

Rational has published a set of 16 sample metrics in the *Unified Software Project Management Rational ProjectConsole Sample Metrics* white paper. Sample metrics for Microsoft Project are published in the *Unified Software Project Management Using Rational ProjectConsole to Collect Microsoft Project Metrics* white paper. Additional white papers for other collection sources will also be published.

You can obtain the white papers from the ProjectConsole product page located on the Rational Web site at www.rational.com.

ProjectConsole and ClearCase LT

Can ProjectConsole collect artifacts from ClearCase LT?

Yes. ProjectConsole collects artifacts from both Rational ClearCase and Rational ClearCase LT™.

Automatic Email Notification

Can ProjectConsole send out an email notification when thresholds are reached?

ProjectConsole currently does not support email notification. However, you can set up email notification by means of a transformation script.

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