

***Telelogic Dashboard  
DOORS 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 DOORS Walkthrough for Telelogic Dashboard!

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

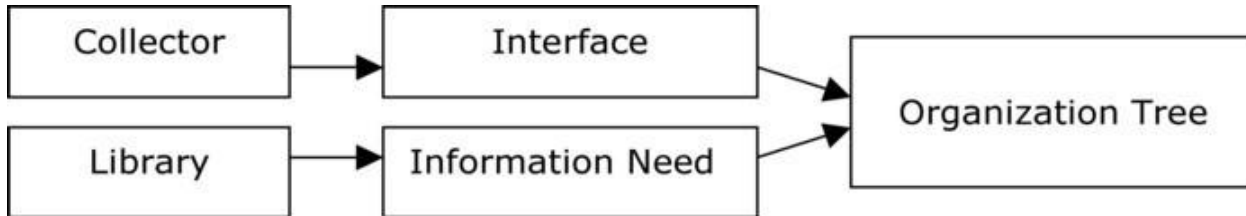
Telelogic Dashboard spans the gap between the management process desired and the one currently in place. Focus on managing by exception using Telelogic Dashboard alerts, analysis, graphical displays and drillable views that provide all the information needed to make well-informed decisions quickly. Using a web-based interface and intelligent integrations to software life cycle tools, Telelogic Dashboard delivers industry best practices ready to be applied. Finally, Telelogic Dashboard checks project compliance with industry standards and unit templates, ensuring a course to success.

# Data Collection Walkthroughs

## Data Collection Overview

Before beginning the integration to a data source, it is important to understand the key elements that allow the portal to gather and display data from your data.

Data in the Portal is gathered by the **Collector**, configured by the **Interfaces**, organized by **Information Needs** and analyzed in the **Organization Tree**.



The **Collector** (Windows based executable) - Gathers data from outside sources and stores it in the **Transform** database.

- **Outside Data Sources** include: Telelogic DOORS, Telelogic Synergy, Telelogic Change, Microsoft Project, Oracle Databases, Microsoft SQL Databases, Microsoft Access, Microsoft Excel, ODBC, CSV, and HP Quality Center.
- The **Transform** is a MS 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 DOORS Sample Walkthrough

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

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

- Set up DOORS modules for collection
- Portal Configuration:
  - Examine/Configure an Interface in the Portal
  - Examine/Configure an Information Need
  - Assigning Schedules to a Template
  - Setup a Unit with Information Needs (or use a template)
- Collector Configuration
  - Configure the Collector
  - Run a collection
  - Check/Resolve any collection errors/problems
- Unit Configuration
  - Check for collected items in the Portal and assign them to Units
  - Refresh the Unit
  - View collected data graphs in the Portal

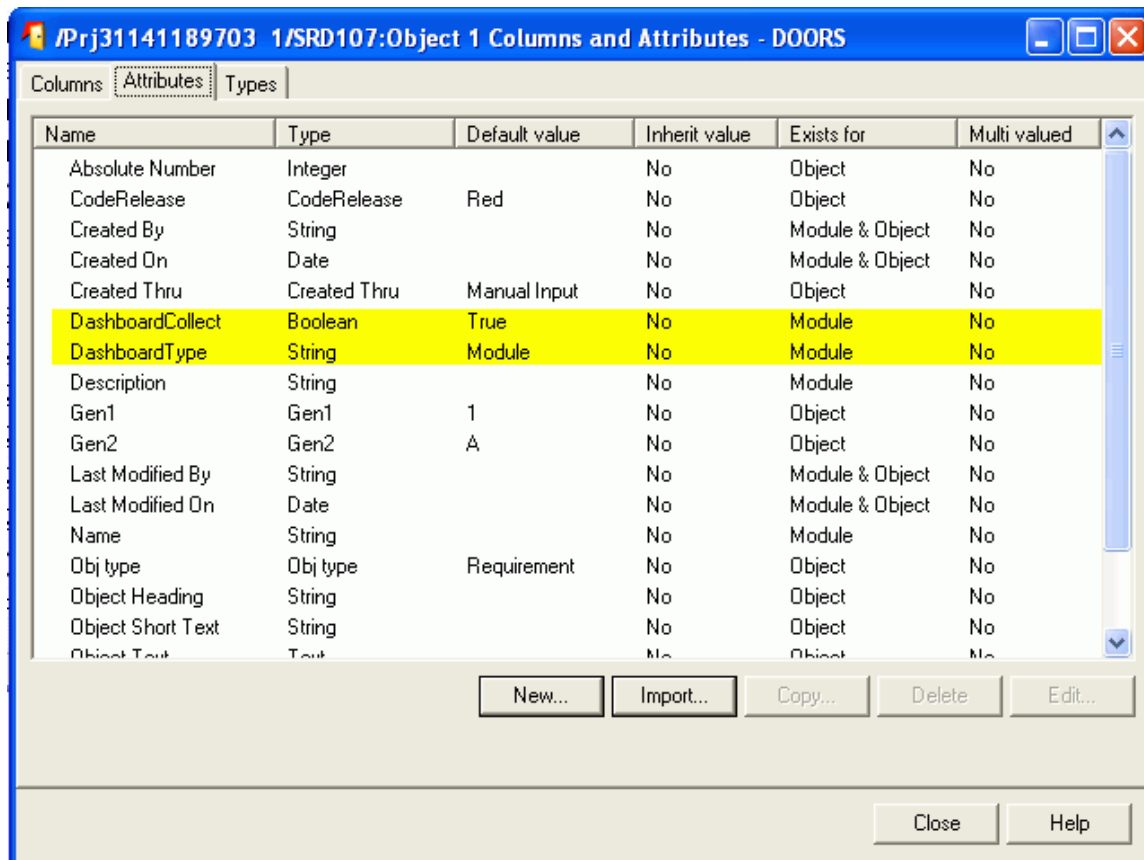
## Configuring DOORS

Before the Dashboard can collect data from your DOORS modules, the modules you wish to collect data from will need to be configured for use with the Dashboard. There are two attributes you will need to define on the DOORS modules from which you wish to collect data.

The first attribute, **the Collect attribute**, determines if the module should be considered for collection. You may name it anything you wish (the default is DashboardCollect), and it must be a module attribute of *Boolean type*. You will need to create this attribute and set it to "True" in all modules from which you wish to collect. If you will be collecting data from all DOORS modules you should set the value of the Collect attribute to "True" when you are creating the attribute.

The second attribute, **the Type attribute**, identifies which **Interface** is used to collect for a DOORS module. You may name it anything you wish (the default is DashboardType), and it must be a module attribute of *string type*. You will need to create this attribute and set it to "Module" in all modules from which you wish to collect. The "Type identifier" in the DOORS Requirements **Interface** that is shipped with the **Dashboard** is set to "Module". The Type identifier enables you to collect different information from different sets of DOORS modules at the same time. You can use a value other than Module, as long as there is an interface defined with that Type Identifier. If you will be collecting data from all DOORS modules you should set the default value of the Type attribute to "Module" when you are creating the attribute.

Both attributes must be configured for any DOORS modules that are to be included in the Dashboard data collection.

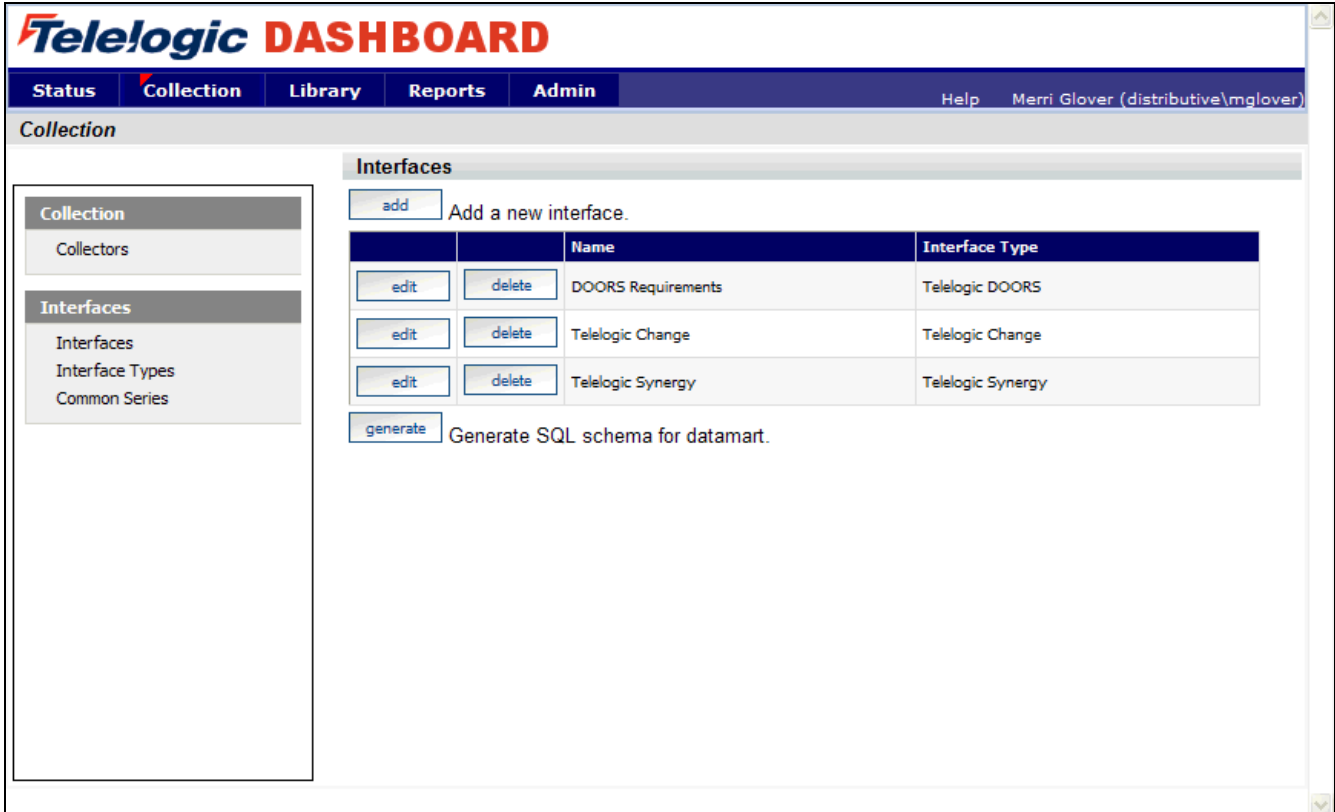


## Configuring the Portal

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 DOORS.

### 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. The user is logged in as Merri Glover (distributive\mglover). The main content area is titled 'Collection' and features a left-hand sidebar with a tree view containing 'Collection' (with 'Collectors' sub-item) and 'Interfaces' (with 'Interfaces', 'Interface Types', and 'Common Series' sub-items). The main area displays the 'Interfaces' section, which includes an 'add' button with the text 'Add a new interface.', a table listing existing interfaces, and a 'generate' button with the text '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

From the Interfaces List, click on the **edit** button to open the DOORS Requirements interface.

The interface will open to the **general** tab. This is where all the information about what is being collected is stored. This specific interface is a default interface for Telelogic DOORS. You will notice that a short description has been entered and the Transform Server has been selected as the Database. You will also notice the Type Identifier set to "Module". This value is how the Collector knows what to collect from a specific module in DOORS. This is the value that you put in the Dashboard Type attribute that you added to DOORS. Different interfaces may have different type identifiers so that you are able to collect different information from different modules.

**Telelogic DASHBOARD**

Status **Collection** Library Reports Admin Help Merri Glover (distributive\mglover)

**Edit Interface** Collection -> Edit Interface (DOORS Requirements)

general **fields** queries

Name: DOORS Requirements (1)

Interface Type: Telelogic DOORS

Description: TheDOORS Requirements Interface contains indicators that store and display requirements information.

Type Identifier: Module

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 table 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 that is 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.

Check the list of Fields for attributes that do not exist in your DOORS database. If there is a field in the list that is not in your DOORS database, you have three options. First, you could add the field to your DOORS modules. Each field helps to create different graphs within Dashboard. The second option is to click the "Do not collect from source?" box for each field that you do not have in your database. This will allow you to keep a list of the default field values for possible use later. The final option is to delete the field(s) from the list. The second option is recommended.

The screenshot shows the Telelogic DASHBOARD interface for editing fields. The 'fields' tab is active. The 'List of Sets' section shows a dropdown menu set to 'Default Set'. The 'Title' field contains 'Default Set' and the 'Database Table' field contains 'DOORSReqs'. The 'Fields in Selected Set:' section lists several fields, with 'Created On - CreatedOn (date)' selected. The 'Selected Field Properties' section shows the 'Do not collect from source?' checkbox is unchecked, the 'Source Attribute' is 'Created On', the 'Table Field' is 'CreatedOn', the 'Type' is 'Date', and the 'Value' is 'Allow null - default optional'. The 'default value' field is empty. At the bottom, there are 'save' and 'cancel' buttons, and a checked checkbox for 'Add (new) table fields during save?'.

If you need to modify the list of attributes, you will potentially have to change the queries, and you will definitely have at least one graph that will not show data. The most common omission is the "Obj Type" attribute. This field is used in most of the queries, and if this is an attribute that you do not have, you will need to change the queries. The example below is how you would need to change the "Requirements Added" query to reflect a database that didn't have the "Obj Type" attribute.

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. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The current page is 'Edit Interface' for 'Collection -> Edit Interface (DOORS Requirements)'. The 'queries' tab is active, showing a list of queries. The 'Requirements Added' query is highlighted in yellow. Below the list are 'save' and 'cancel' buttons, and a checkbox for 'Add (new) table fields during save?' which is checked.

		Name	Type
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Object Type-Comments	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Object Type-Headings	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Object Type-Requirements	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Requirements Added	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Requirements Allocation	MultipleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Requirements Approval Status	MultipleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Requirements Completed	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Requirements Modified	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	Requirements Total	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	TBD Count	SingleSeries
<input type="button" value="edit"/>	<input type="button" value="delete"/>	User Requirements Total	SingleSeries

Clicking the **edit** button by a query in the main list will open the Edit Query page and allow the user to edit the selected query. Edit the "Requirements Added" query by clicking the **edit** button next to it.

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

**Telelogic DASHBOARD**

Status Collection Library Alerts Admin

Edit Query Edit Interface (DOORS Requirements) -> Edit Query

Title: Requirements Added

Common Series: Requirements - Requirements Added

Query Builder Query Edit

1 Data from: DOORSReqs database table

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

3 Filters are:  the current item  for the current period

4 With terms:

CreatedOn <= %ENDDATE%  
obj\_type = 'requirement'  
CreatedOn >= %StartDate%

Add new query term:

CreatedOn (Default Set) =

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

**Telelogic DASHBOARD**

Status Collection Library Alerts Admin

Edit Query Edit Interface (DOORS Requirements) -> Edit Query

Title: Requirements Added

Common Series: Requirements Added

Query Builder Query Edit

```
SELECT COUNT(*) FROM DoorsReqs WHERE g_collectdate=%COLDATE% AND  
CreatedOn>=%STARTDATE% AND CreatedOn<=%ENDDATE% AND  
obj_type = 'Requirement'
```

The Edit Query tab has a **text field** where the SQL statements can be entered, modified or deleted. You can place your cursor anywhere in the text field to add or modify the query. In this instance, the last case is the one that needs to change. Highlight and delete it.

Next, type in the string "obj\_heading IS NOT NULL". This will bring back all requirements from your database. Be sure to save your changes.

**Telelogic DASHBOARD**

Status Collection Library Alerts Admin

Edit Query Edit Interface (DOORS Requirements) -> Edit Query

Title: Requirements Added

Common Series: Requirements Added

Query Builder Query Edit

```
SELECT COUNT(*) FROM %TABLE% WHERE g_collectdate=%COLDATE% AND
CreatedOn>=%STARTDATE% AND CreatedOn<=%ENDDATE% AND
Obj_heading IS NOT NULL
```

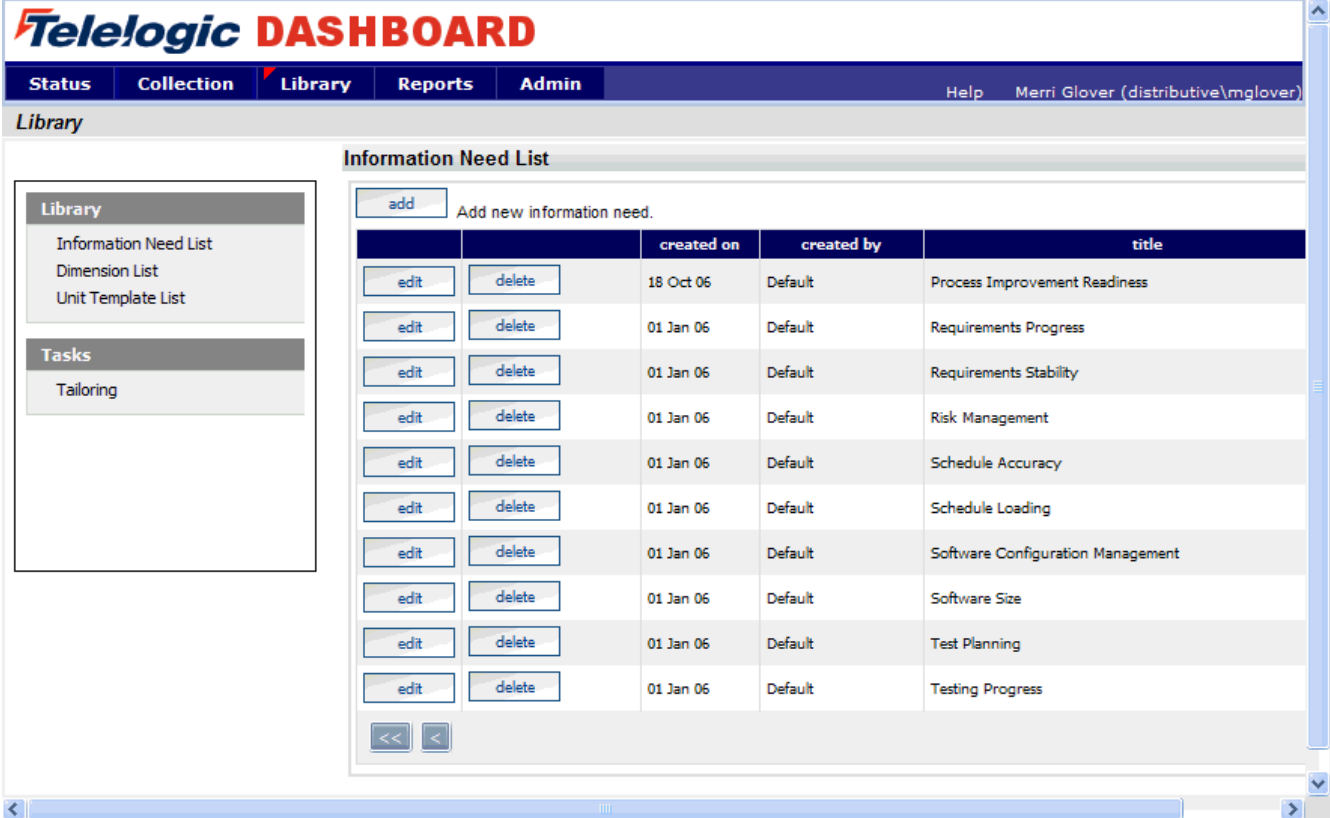
save

Similar changes would need to be made to other queries depending on what is in your DOORS database.

## Verifying the Information Need

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

There are two information needs that are setup to work with DOORS automatically. They are "Requirements Progress" and "Requirements Stability".



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes tabs for Status, Collection, Library (selected), Reports, and Admin. The user is identified as Merri Glover (distributive\mgllover). The main content area is titled "Library" and contains a sidebar with "Library" and "Tasks" sections. The "Information Need List" is displayed as a table with columns for "created on", "created by", and "title". Each row includes "edit" and "delete" buttons. The table lists several information needs, including "Requirements Progress" and "Requirements Stability".

		created on	created by	title
<input type="button" value="edit"/>	<input type="button" value="delete"/>	18 Oct 06	Default	Process Improvement Readiness
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Requirements Progress
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Requirements Stability
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Risk Management
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Schedule Accuracy
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Schedule Loading
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Software Configuration Management
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Software Size
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Test Planning
<input type="button" value="edit"/>	<input type="button" value="delete"/>	01 Jan 06	Default	Testing Progress

Let's take a look at Requirements Stability. This Information Need shows the stability and volatility of various requirements.

The information need display will show the **general** tab.

**Telelogic DASHBOARD**

Status Collection **Library** Alerts Admin

Information Need Library -> Information Need (Requirements Stability)

general reference guidance graphs dimensions

Title: Requirements Stability

State:  draft  defined  active  retired

May be exported to other sites?

Keywords:

Description: This information need contains a series of graphs to manage the stability for requirements of delivered software items.

Created on 2/27/2006 Updated on: 2/13/2007  
Created by

save cancel

Selecting the **graphs** tab will list the graphs associated with the selected information need. In the sample below, Requirements Stability has three 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.

**Telelogic DASHBOARD**

Status Collection **Library** Alerts Admin

Information Need Library -> Information Need (Requirements Stability)

general reference guidance **graphs** dimensions

Current Actual: Requirements Volatility\Total Requirements

Current Plan: Requirements Volatility\Planned Requirements

Current Status: Requirements Volatility\Volatility Alarm

3 graphs defined.

Graphs    Add new graph ...

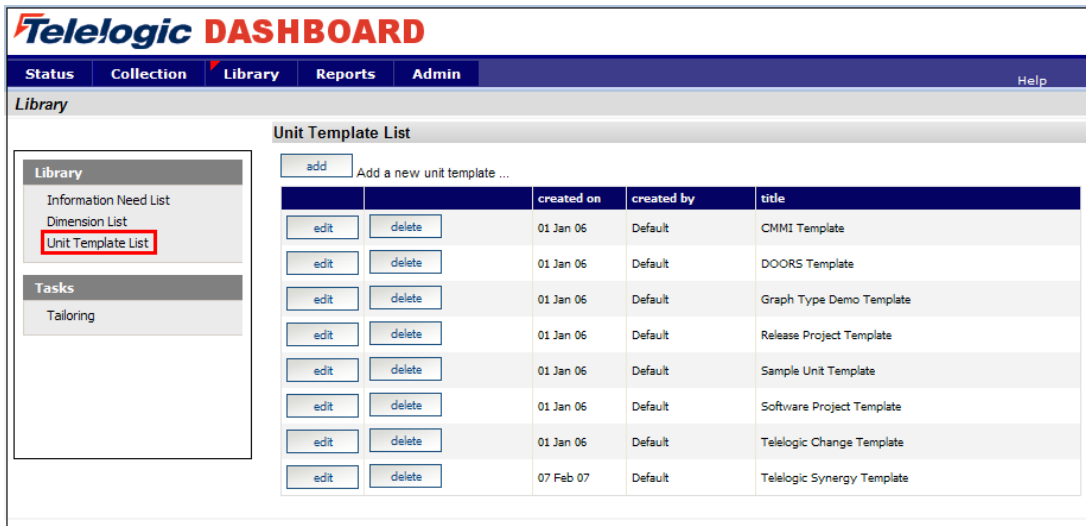
Requirements Change Summary (Run)  
Requirements TBDs (Run)  
Requirements Volatility (Run)

save cancel

## Assign a Schedule to a DOORS Template

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

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



The screenshot shows the Telelogic DASHBOARD interface. The top navigation bar includes 'Status', 'Collection', 'Library', 'Reports', and 'Admin'. The 'Library' tab is active. On the left, a sidebar menu shows 'Library' with sub-items 'Information Need List', 'Dimension List', and 'Unit Template List' (highlighted with a red box). Below this is a 'Tasks' section with 'Tailoring'. The main content area is titled 'Unit Template List' and features an 'add' button and the text 'Add a new unit template ...'. Below this is a table with columns for 'edit', 'delete', 'created on', 'created by', and 'title'.

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

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

general elements

add delete

Elements:

Requirements Progress (infoeed)  
Requirements Stability (infoeed)

Title:

Type: Information Need

save

save

cancel



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.

**Telelogic DASHBOARD**

Status Collection **Library** Reports Admin Help Merri Glover (distributive\mgllover)

Unit Template Library -> Unit Template (DOORS Template)

general elements

add delete

Elements:

- Weekly Schedule (schedule)
- Requirements Progress (infoneed)
- Requirements Stability (infoneed)

Title: Weekly Schedule

Type: Default Schedule

Schedule: Weekly Schedule 2006 - 2007

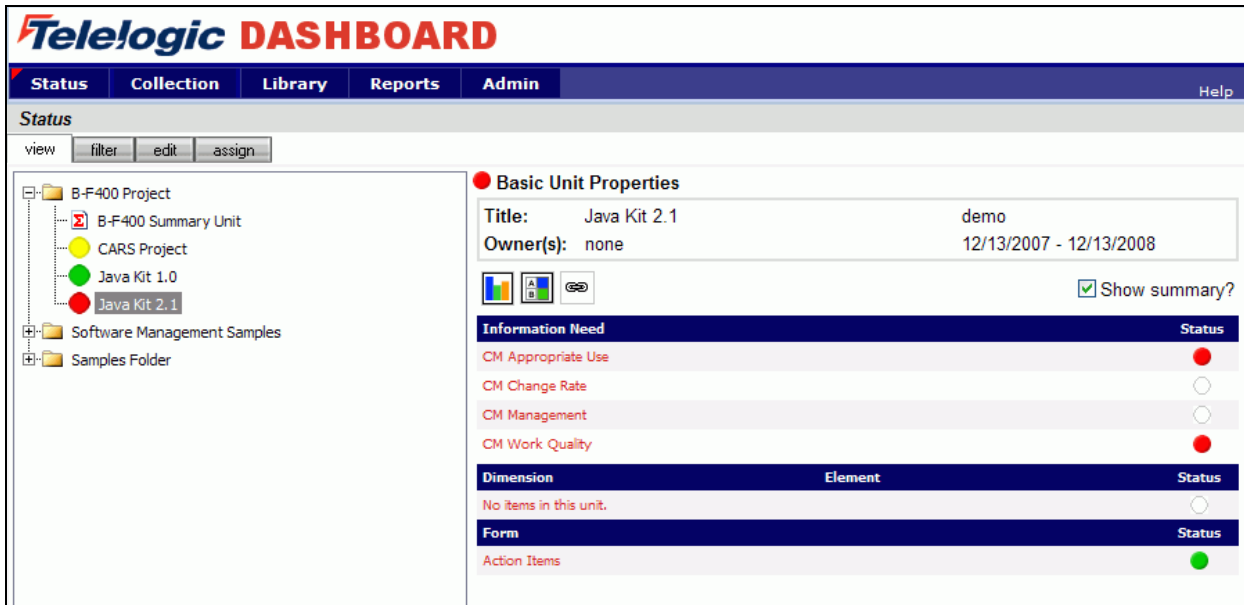
save

save cancel

Make sure to **save** your changes.

## Setup a unit with the DOORS Template

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



The screenshot shows the Telelogic DASHBOARD interface. The 'Status' tab is active, and the 'edit' subtab is selected. On the left, a tree view shows a folder structure: B-F400 Project, B-F400 Summary Unit, CARS Project, Java Kit 1.0, Java Kit 2.1 (selected), Software Management Samples, and Samples Folder. The main area displays 'Basic Unit Properties' for the selected unit:

- Title: Java Kit 2.1
- Owner(s): none
- demo
- 12/13/2007 - 12/13/2008
- Show summary?

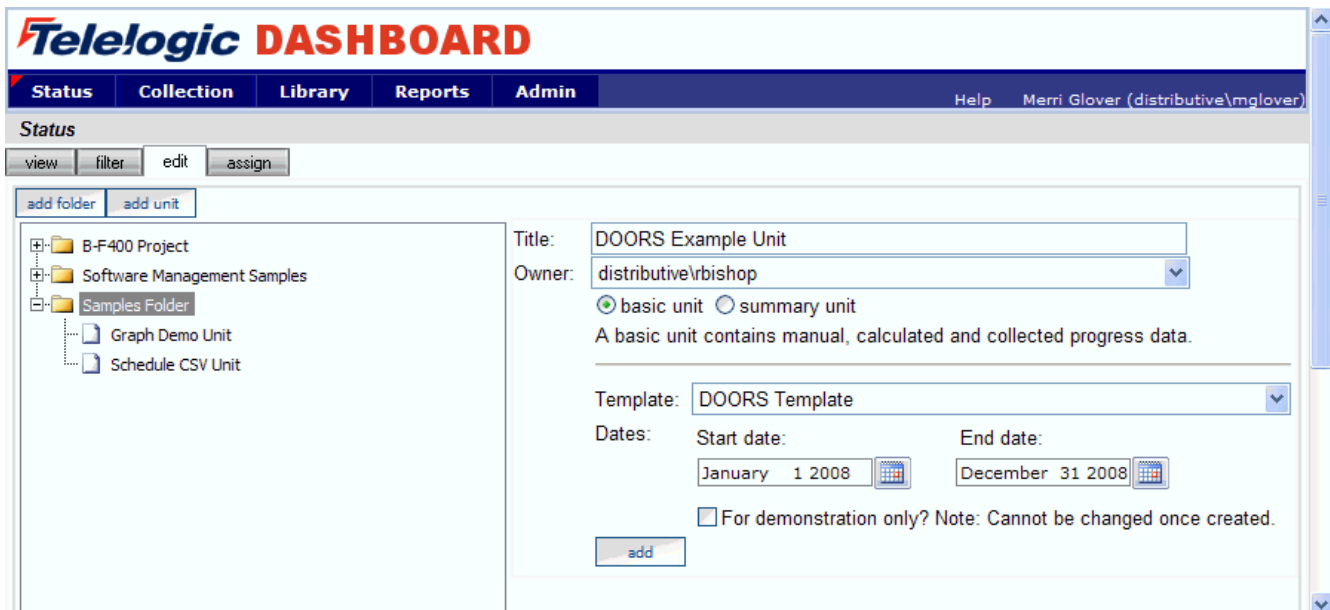
Information Need	Status
CM Appropriate Use	●
CM Change Rate	○
CM Management	○
CM Work Quality	●

Dimension	Element	Status
No items in this unit.		

Form	Status
Action Items	●

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

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

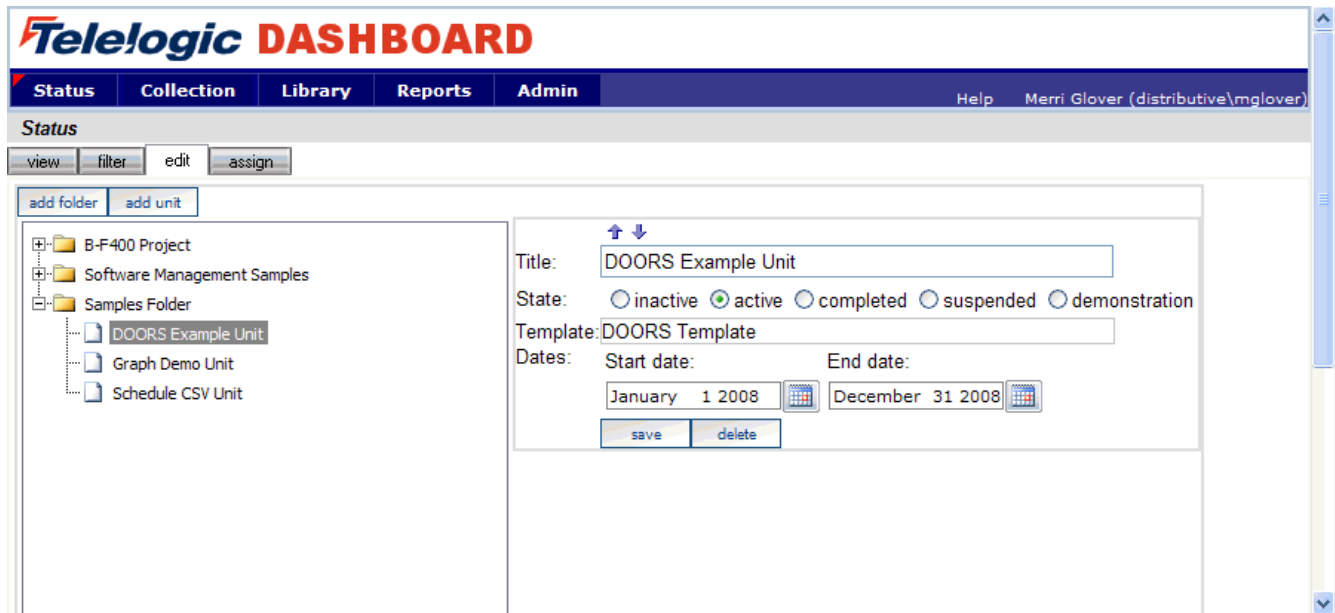


The screenshot shows the Telelogic DASHBOARD interface with the 'add unit' form open. The 'add unit' button is selected above the tree view. The tree view shows the 'Samples Folder' selected. The form fields are:

- Title: DOORS Example Unit
- Owner: distributive\rbishop
- Unit type:  basic unit  summary unit
- Template: DOORS Template
- Dates: Start date: January 1 2008, End date: December 31 2008
- For demonstration only?  Note: Cannot be changed once created.

An 'add' button is visible at the bottom of the form.

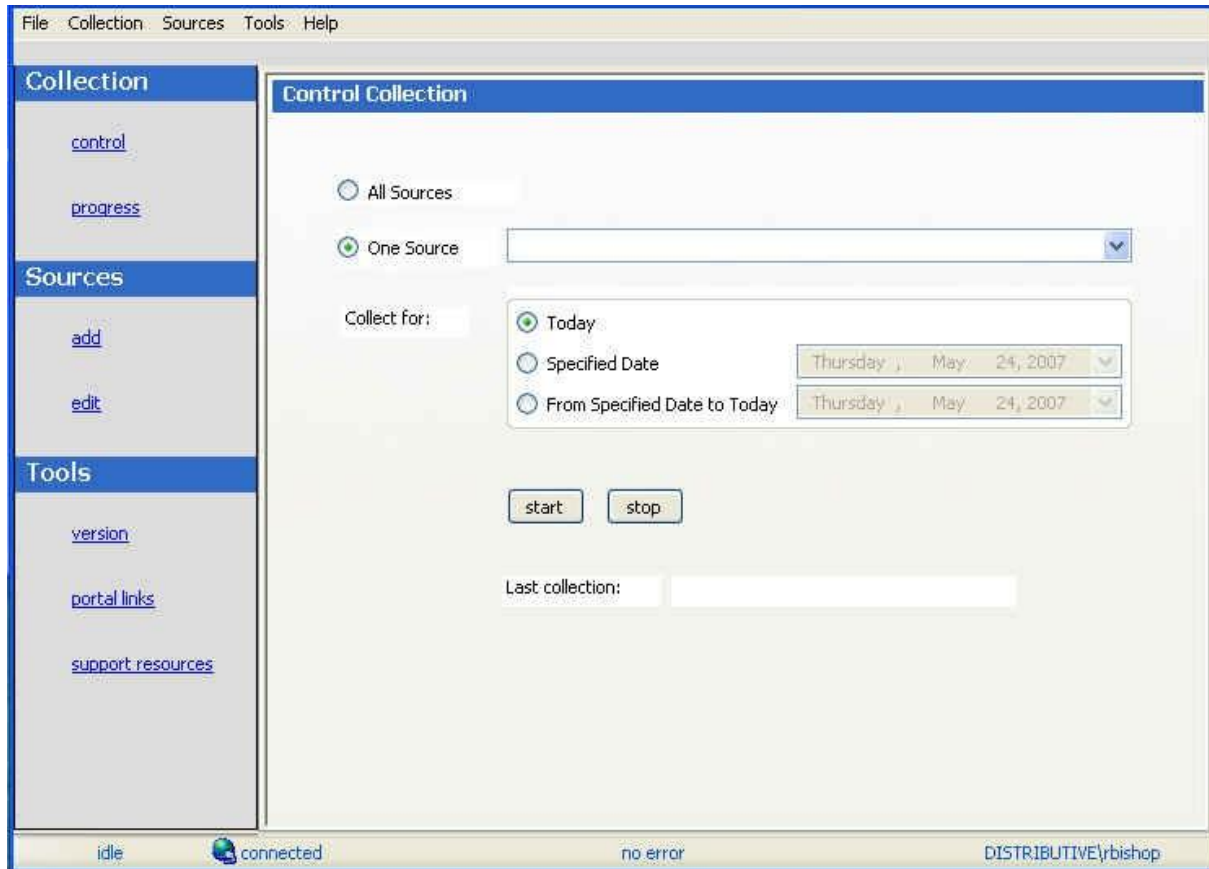
After you click the **add** button, the new unit will appear in the Status tree.



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

## Configuring the Collector

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

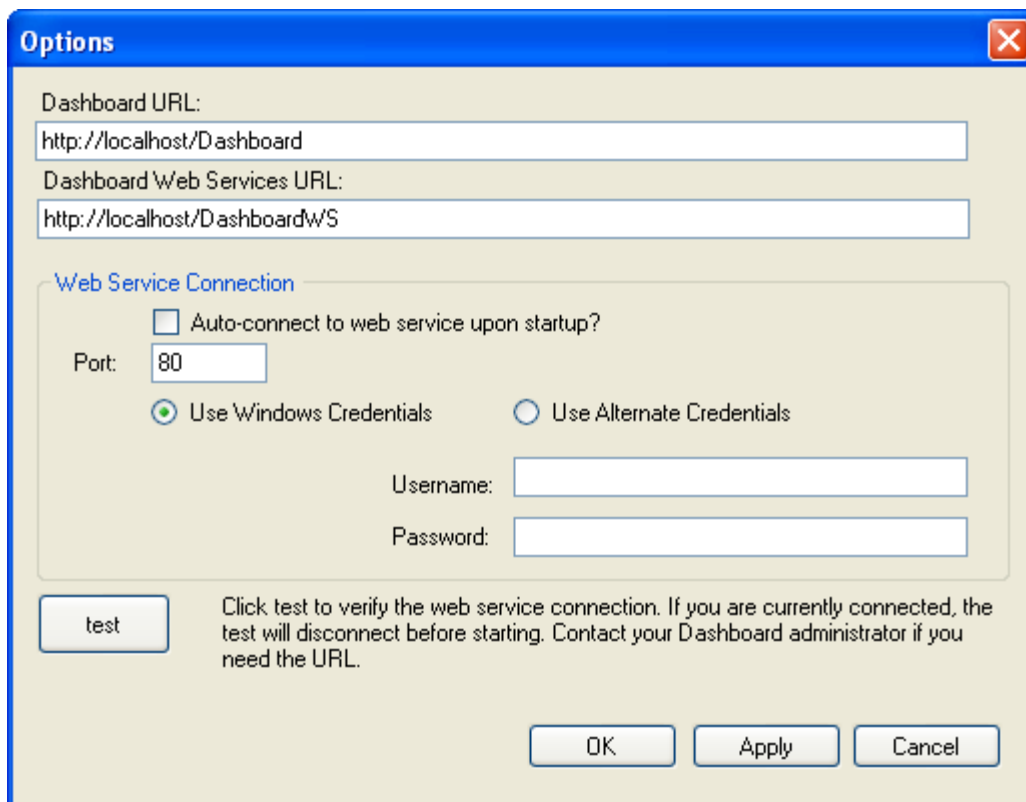


## Verify Connection to Web Services

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.



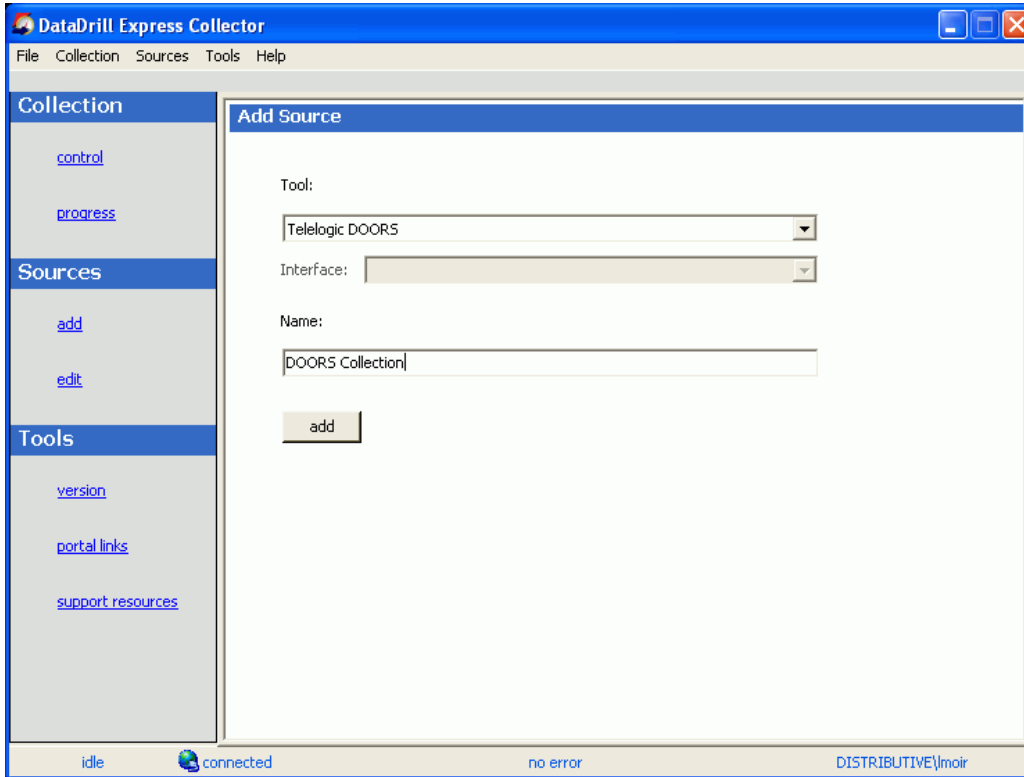
The image shows a Windows-style dialog box titled "Options" with a blue title bar and a close button (X) in the top right corner. The dialog is divided into several sections:

- Dashboard URL:** A text input field containing "http://localhost/Dashboard".
- Dashboard Web Services URL:** A text input field containing "http://localhost/DashboardWS".
- Web Service Connection:** A section with a light gray background containing:
  - An unchecked checkbox labeled "Auto-connect to web service upon startup?".
  - A "Port:" label followed by a text input field containing "80".
  - Two radio buttons: "Use Windows Credentials" (which is selected) and "Use Alternate Credentials".
  - Below the radio buttons are two text input fields labeled "Username:" and "Password:", both of which are currently empty.
- test button:** A button labeled "test" located to the left of a paragraph of text.
- Instructions:** A paragraph of text: "Click test to verify the web service connection. If you are currently connected, the test will disconnect before starting. Contact your Dashboard administrator if you need the URL."
- Buttons:** Three buttons at the bottom: "OK", "Apply", and "Cancel".

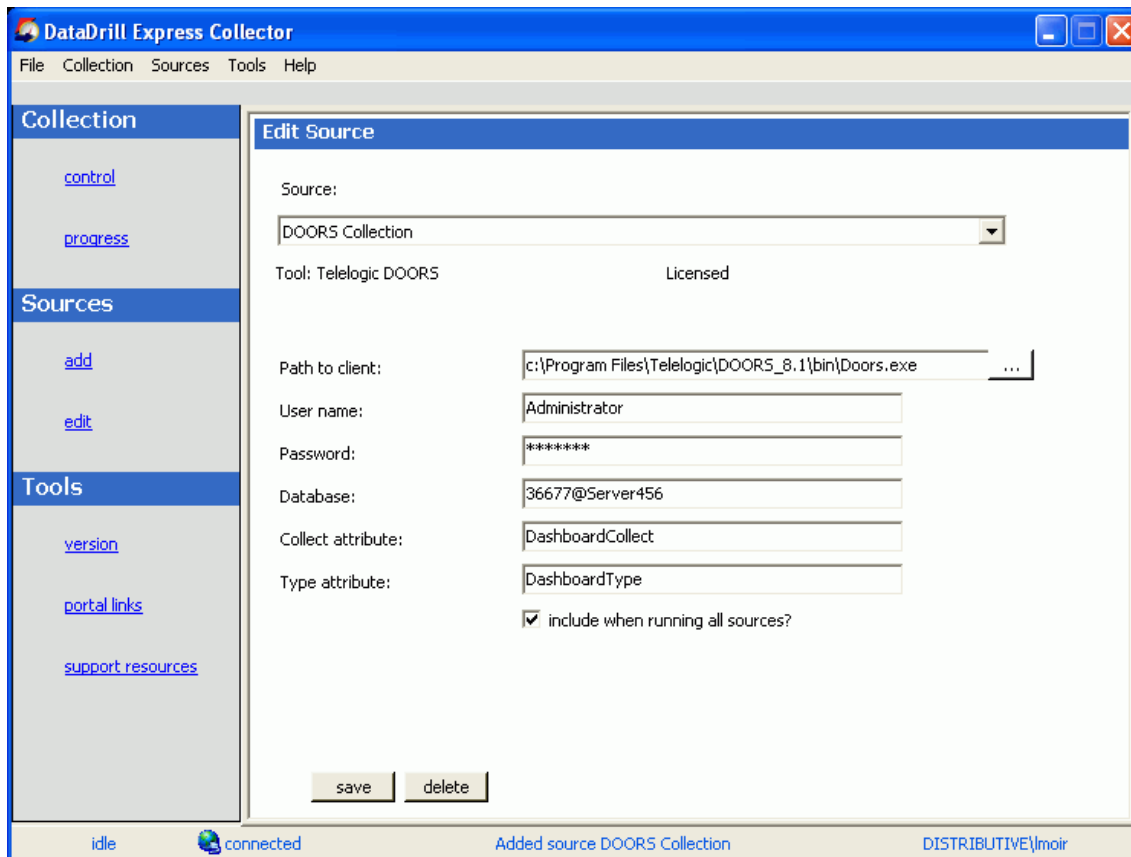
Click the test button to test the connection. If, after pressing the "test" button, you receive an error or warning message, review the message and your web services configuration to correct the problem. The web services configuration information is contained in the web.config in the Web Services folder.

## Add a Source

Choose **Sources/add** from the left menu. Select Telelogic DOORS as the Tool, and give your source a name. 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 to let the Collector know which Interface to use when collecting from a specific source. For DOORS, this box is grayed out because that delineation is made in setting up the Interface (see section on Configuring the Portal for more information). Click the **add** button.



The setup for Telelogic DOORS requires some basic login information as well as some Portal specific information.



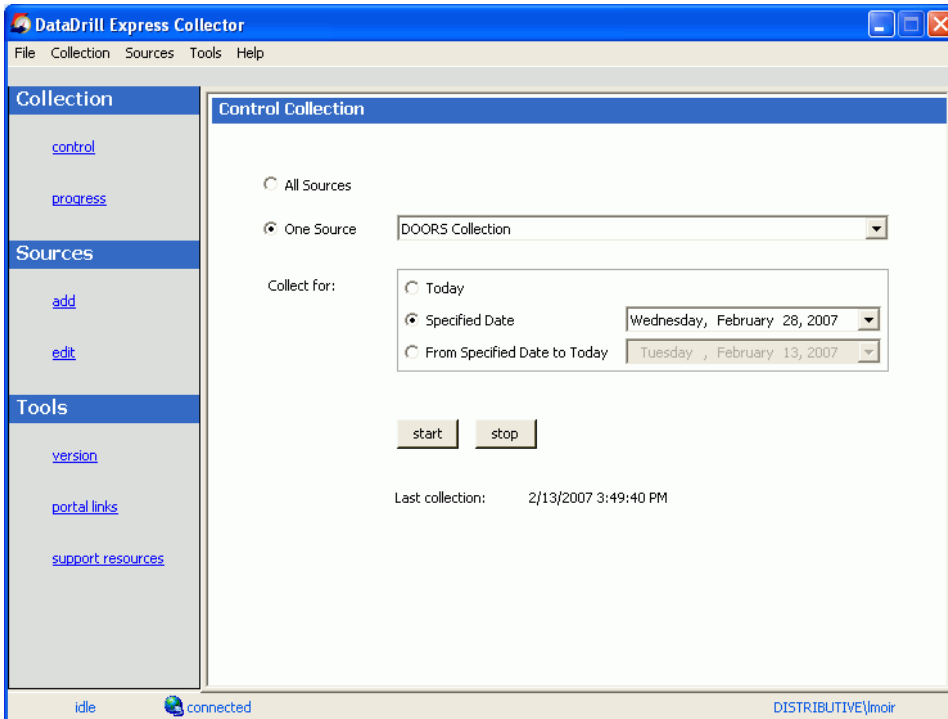
The "**Path to client**" is the location where Telelogic DOORS client is installed on the local machine. Click the button to the side to browse for the file on the computer. The "**User name**" and "**Password**" should be a DOORS user who has access to all of the projects and modules from which data needs to be collected. The "**Database**" is the port number and the server name in the format <port number>@<server> of the DOORS database.

The "**Collect attribute**" and "**Type attribute**" are the two attributes that need to be added to the DOORS database as module level attributes. The Collector will only collect those modules that have the Collect Attribute set to true. The Type Attribute helps to define which Interface will be used to collect data from a module. Both of these values should match the attributes that were added in Configuring DOORS section.

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

## Running a Collection

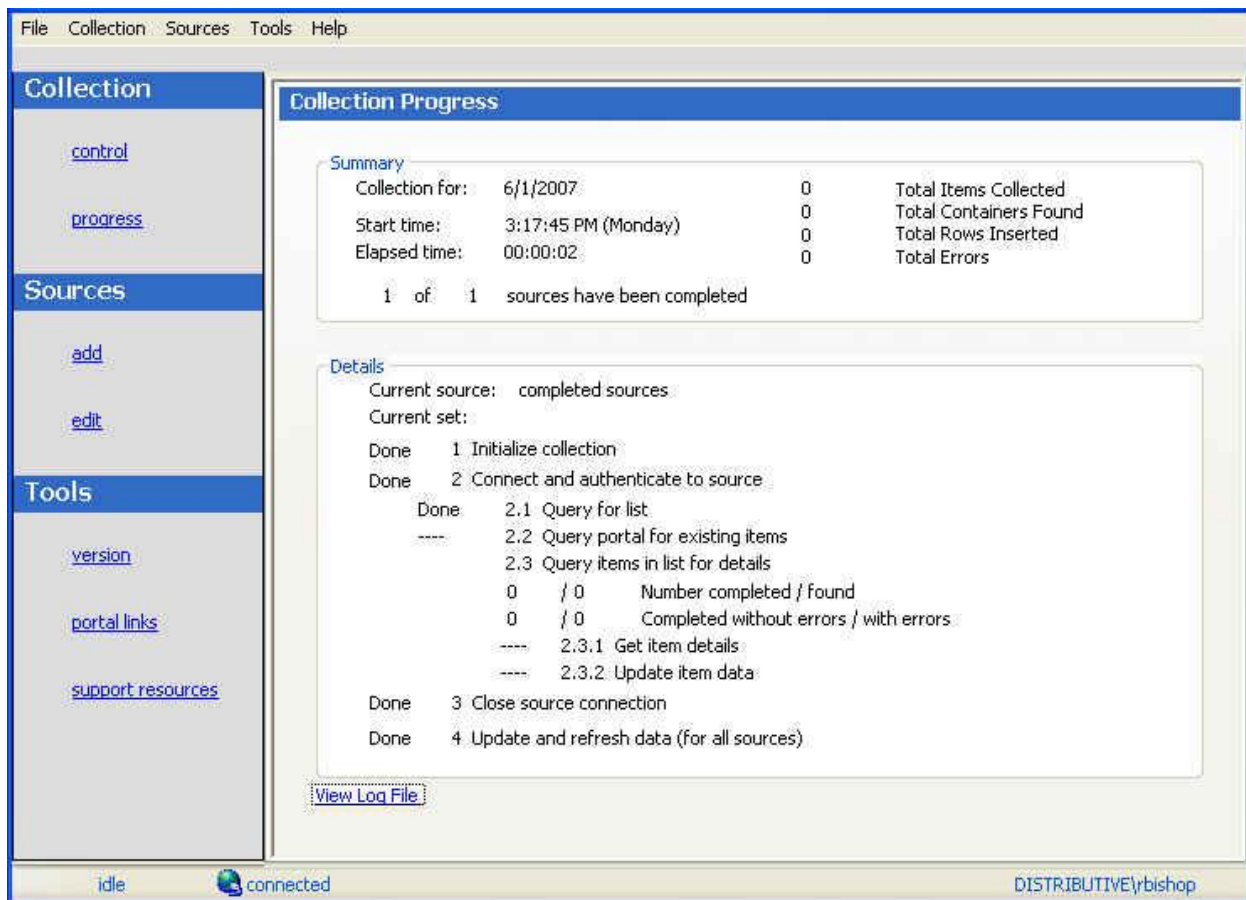
Once you've saved your configurations, you're ready to run your collection. Go to the **control** link in the Collection section. Click the radio button for **One Source** and select your source from the drop down on the right. Below the drop down, select "Specified Date" and choose a date that is a valid collection date in a period in the schedule you are using for the unit. This will allow you to see data in your graphs automatically. See the Help files for more information about how schedules affect the Collector.



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

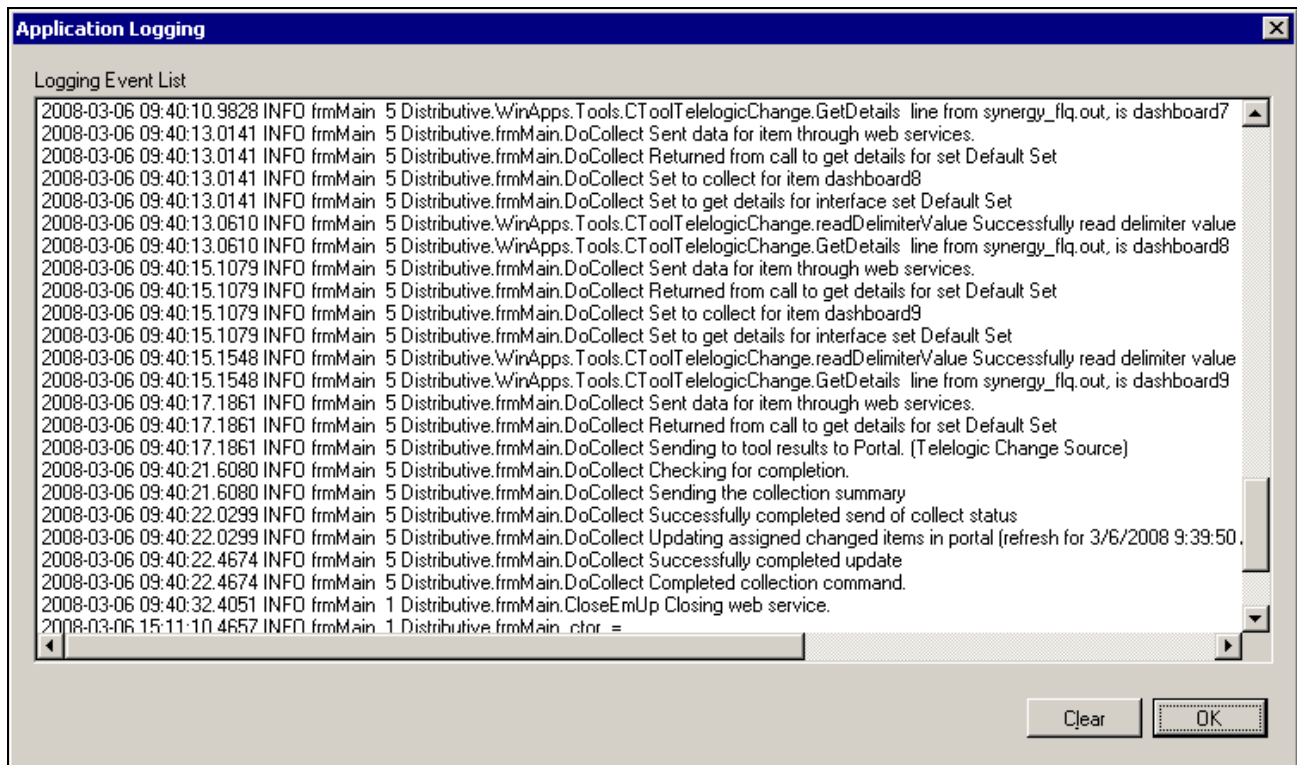


The **Collection Progress** page will appear and you will be able to track your collection as it runs. You will see in the details on the bottom the number of **items** and **containers** that were found and see how far the collection has progressed.



Once your collection finishes, the **summary** box at the top of the collector will tell you information about the collection itself, how long the collection took, how many **items** were collected, how many rows were inserted into the database table(s) 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 the log file. (The log can also be accessed with the File menu.) This log file gives you information on why a module may not have been collected. You also might notice that the number of found items is greater than the number of items completed. This is most likely caused by finding containers (which are folders for DOORS), and unless there is a report of errors, everything collected correctly.



The next step is configuring the Unit.

# Configuring the Unit

## Assigning Collected Items

Once you have run your collection without errors, you are ready to add your **Items** to your **Unit**. Go back to the **Status** page and click on the **edit** subtab. Click on the Unit that you created earlier. On the right hand side, click on the **by source** subtab. From the drop down menus, choose your Collector and the interface that you are using to collect. When you've selected those options, click on the **show** button. In the list below you will see a list of all of the **items** that have been collected.

The screenshot displays the Telelogic DASHBOARD interface. At the top, the 'Status' tab is selected, with subtabs for 'Collection', 'Library', 'Reports', and 'Admin'. The user is logged in as Merri Glover. The main area is titled 'Status' and contains a navigation bar with 'view', 'filter', 'edit', and 'assign' buttons. On the left, a tree view shows a folder structure: 'B-F400 Project' containing 'Software Management Samples' and 'Samples Folder'. Under 'Samples Folder', there are three units: 'DOORS Example Unit' (highlighted), 'Graph Demo Unit', and 'Schedule CSV Unit'. On the right, there are two subtabs: 'by date' and 'by source'. The 'by source' subtab is active, showing configuration options: 'Status' (radio buttons for 'all', 'unassigned', 'assigned', 'ignored'), 'Collector' (dropdown menu set to 'MERRI2'), 'Interface' (dropdown menu set to 'DOORS Requirements'), and 'show items'/'show containers' radio buttons. A 'show' button is located below these options. Below the configuration is an 'Item List' section with 'ignore' and 'assign' buttons. The list contains 11 items, all labeled 'Empty' followed by a number from 0 to 110.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help Merri Glover (distributive\mglover)

Status

view filter edit assign

- B-F400 Project
  - Software Management Samples
  - Samples Folder
    - DOORS Example Unit
    - Graph Demo Unit
    - Schedule CSV Unit

by date by source

Status:  all  unassigned  assigned  ignored

Collector: MERRI2

Interface: DOORS Requirements

show items  show containers

show

Item List ignore assign

- Empty0
- Empty1
- Empty10
- Empty100
- Empty101
- Empty102
- Empty103
- Empty104
- Empty105
- Empty106
- Empty107
- Empty108
- Empty109
- Empty110

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

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help Merri Glover (distributive\mglover)

Status

view filter edit assign

- B-F400 Project
- Software Management Samples
- Samples Folder
  - DOORS Example Unit
  - Graph Demo Unit
  - Schedule CSV Unit

by date by source

Status:  all  unassigned  assigned  ignored

Collector: MERR12

Interface: DOORS Requirements

show items  show containers

show

Item List ignore assign

SRD104
SRD105
SRD106
SRD107
SRD108
SRD109
SRD110
SRD111
SRD112
SRD113
SRD114
SRD115
SRD116
SRD117

Assigned Items:

Show: all unassign

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

**Status**

view filter edit assign

- [-] B-F400 Project
- [-] Software Management Samples
- [-] Samples Folder
  - [-] DOORS Example Unit
  - [-] Graph Demo Unit
  - [-] Schedule CSV Unit

by date by source

Status:  all  unassigned  assigned  ignored

Collector: MERRI2

Interface: DOORS Requirements

show items  show containers

show

Assigned Items:


Show: all unassign

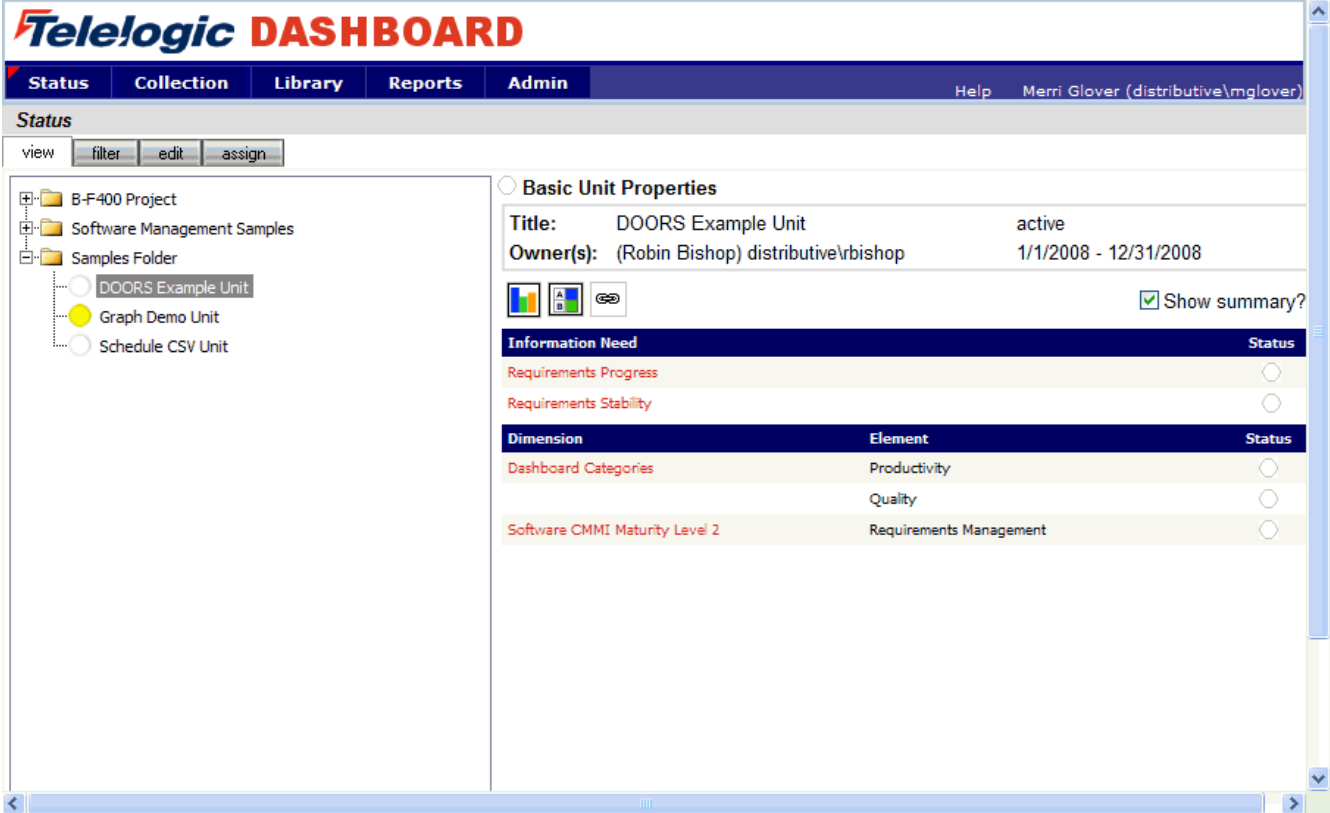
- SRD110 (item)
- SRD111 (item)
- SRD112 (item)
- SRD113 (item)

Item List ignore assign

- Empty0
- Empty1
- Empty10
- Empty100
- Empty101
- Empty102
- Empty103
- Empty104
- Empty105
- Empty106
- Empty107
- Empty108
- Empty109
- Empty11
- Empty110
- Empty111
- Empty112
- Empty113

## Refreshing the Unit

While on the Status tab, click on the view subtab and select your unit from the tree on the left hand side. On the right hand side of the page, click on the **Graph** button, .



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. The left sidebar shows a tree view with folders: 'B-F400 Project', 'Software Management Samples', and 'Samples Folder'. Under 'Samples Folder', there are three units: 'DOORS Example Unit' (selected), 'Graph Demo Unit', and 'Schedule CSV Unit'. The main content area displays 'Basic Unit Properties' for the selected unit:

- Title:** DOORS Example Unit (active)
- Owner(s):** (Robin Bishop) distributive\rbishop (1/1/2008 - 12/31/2008)

Below the properties are three icons: a bar chart (Graph), a document with 'A B' (Reports), and a refresh icon. A checkbox 'Show summary?' is checked.

The 'Information Need' section contains two rows:

Information Need	Status
Requirements Progress	<input type="radio"/>
Requirements Stability	<input type="radio"/>

The 'Dimension' section contains three rows:

Dimension	Element	Status
Dashboard Categories	Productivity	<input type="radio"/>
	Quality	<input type="radio"/>
Software CMMI Maturity Level 2	Requirements Management	<input type="radio"/>

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

**Telelogic DASHBOARD**

Status | Collection | Library | Reports | Admin | Help | Merri Glover (distributive\mglover)

Unit Status *Status -> Unit Status (DOORS Example Unit)*

**Gantt View**

Views

- GANTT
- By Dimension
- By Information Need
- By Interface
- By Item
- By Graph
- By Alarm Status

Dashboards

Data

Definition

managed items

	J	F	M	A	M	J	J	A	S	O	N	D
SRD110												
SRD111												
SRD112												
SRD113												

2008

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 | Merri Glover (distributive\mglover)

Unit Status *Status -> Unit Status (DOORS Example Unit)*

**Unit Definition**

Title: DOORS Example Unit

Owner: (Robin Bishop) distributive\rbishop

State:  inactive  active  completed  suspended  demonstration

Refresh Order: 0

Schedule:  basic schedule mode  advanced schedule mode

Weekly Schedule 2008 - 2010

Progress Report: no selection

Office Template: no selection

Dates: Start Date: January 1 2008 End Date: December 31 2010

Description:

URL: [ + ] Hyperlink

Project Stage:

Project Plan:

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 27<sup>th</sup>, you would want to refresh over that date.

In this example, the refresh runs from March 22<sup>nd</sup> to March 29<sup>th</sup>, but it could be any span of dates that include March 27<sup>th</sup>.

**Telelogic DASHBOARD**

Status Collection Library Reports Admin Help Merri Glover (distrib)

**Refresh** Status -> Unit Status (DOORS Example Unit) -> Refresh Data

Selected Unit DOORS Example Unit

Refresh series with measures for the following date range:

start: March 22 2008

end: March 29 2008

refresh cancel

Status: save

After you have selected your refresh dates, click the **refresh** button. The Status box below will tell you when the refresh has completed. To return 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 are ready to see your data. Once back on the **status** page in your **Unit**, select a **managed item** in the Dashboards panel to view. You should see a data point in your graphs for the date that you ran the collection.

