Telelogic Change User Help

Release 5.1

Before using this information, be sure to read the general information under Notices (page 29).

This edition applies to **VERSION 5.1, Telelogic Change (product number 5724*V87*)** and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Submit a Change Request

1. On the Action Panel, choose the submission form in the list, for example, **Submit a CR**, and then press **Go**.

   The **Change Request Submission** dialog box appears.

2. Set the change request properties. The properties you see will vary, depending on the process that is being used.

   To see a method for presetting some CR submission properties, see Set Default Submission Values (page 108).

   > **Note** Be sure to set the required properties labeled in red.

3. On the dialog box's button bar, click the submission button.

   > **Note** The **Submit a CR** button is present if you are using the Standard Lifecycle (page 111). You might have a different button label depending on the lifecycle (page 111) you are using.

Related Topics

- Show or Modify a Change Request (page 2)
- Transition a Change Request (page 3)
- Subscribe to a Change Request (page 47)
- Take the Telelogic Change User Interface Tour (page 33)

Show or Modify a Change Request

1. On the Action Panel, click the **CR** option button. In central server mode, you do not see the button.
2. In the adjacent box, type a change request ID (page 110).
3. Press **Enter** or click **Show**.

   The **Change Request Information** dialog box appears.
4. View the change request to get the information you need, or to modify the change request, enter new values, and then click **Save**.

Related Topics

- Transition a Change Request (page 3)
- Search (page 5) to look up a change request
- Create an Attachment (page 46)
- Modify Multiple Change Requests (page 50)
- Take the Telelogic Change User Interface Tour (page 33)

Transition a Change Request

1. On the Action Panel, click the **CR** option button.
2. In the adjacent box, type a change request ID.
3. Press **Enter** or click **Show**.

   The **Change Request Information** dialog box appears.
4. On the top or bottom of the **Change Request Information** dialog box, click a transition link (page 112), for example, **Verify**. Only available transitions appear in the dialog box. If no transitions are shown, you cannot transition the CR.

   The **Change Request Transition** dialog box appears. The button on the button bar is labeled with the name of the transition.

   Note The dialog box options depend on the transition you choose.

   You may not see a dialog box, depending on how the transitions have been customized.

   Also, an **Admin Transition** link is available if you have the administrator privilege (page 111) (for example, *pt_admin*). This link takes you to a new page on which you can select *any* transition.
5. Transition the change request.
   1. Enter the transition information.

      Note Be sure to set the required properties labeled in red.
   2. Click the *transition name* button.
   3. If you change your mind or want to review the CR again before you transition it, click **Cancel**. You will see the CR information again.

Related Topics

- Search (page 5) to look up a change request
- Modify Multiple Change Requests (page 50)
- Run a Custom Query (page 73)
- Take the Telelogic Change User Interface Tour (page 33)

Quick Search

Use the quick search operation to search for a free-text string in the current database. Use the advanced Search (page 5) operation to search for a free-text string or an attribute value.

1. Specify whether you want to search CRs or Tasks by clicking the **CR** or **Task** option button in the Action Panel.

   If you are searching a central CR database, you can search only for change requests, as the central CR database does not contain tasks.

   If you are not using a central CR database, you can search for CRs or Tasks in development databases.

2. On the Action Panel, enter a free-text string in the field where you see the text Enter ID or search string.

   Construct the string as follows:

   - use double quotes to search for an exact phrase (for example, `"default values"`)
   - use `+`*`keyword`* to denote a word that must be included in the search (for example, `+default`)
   - use `-`*`keyword`* to denote a word that must be excluded from the search (for example, `-default`)

   If you need additional help constructing a search string, see Search (page 5).

3. Click **Search**.

   A **Search Results** dialog box appears, showing matching information. The results are ranked, according to relevancy. You can sort a column by clicking the heading.

   A message displays if no matches were found.

Related Topics

- Search (page 5)
- Define a New Query (page 15)
- Take the Telelogic Change User Interface Tour (page 33)

Search

Use the advanced search operation to search for a free-text string or an attribute value.

1. Click **Advanced Search**.

   The **Advanced Search** dialog box appears.

2. On the left pane, select the scope of the search (**Change Requests**, **Tasks,** or **Both**).

   If you are searching for CRs, you will not see the **Databases** area (step 3).

   > **Note** If you are logged on to a central CR database, you can only search change requests, as the central CR database does not contain tasks.

   If you are searching for tasks, you will see a list of databases, except for the central CR database.

   If you are searching for both, you will see a list of databases, including the central CR database.

3. Select the **Databases** to be searched.

4. For a free-text search, enter the string in the **Search String** box.

   Type the string for which to search. Construct the string as follows:

   - use double quotes to search for an exact phrase (for example, `"default values"`)
   - use `+`*`keyword`* to denote a word that must be included in the search (for example, `+default`)
   - use `-`*`keyword`* to denote a word that must be excluded from the search (for example, `-default`)

   Click **Search Tips** to get additional help about constructing a search string.

5. Or, to search on a specific attribute value, click the **Attribute Search** tab.

   Select the attribute, and then enter your text string.

   Use the **+** and **-** buttons to add or remove attributes. Adding additional attributes is the same as adding AND to a search string.

6. Click **Search**.

   You will see a ranked list of items matching your search criteria, with the most relevant being listed first. You can sort the results by clicking the column heading. This preference is saved and used during the next search operation.

   If you searched on both change requests and tasks, you will see a separate search results table for each.

Related Topics

- Quick Search (page 4)

- Transition a Change Request (page 3)
- Define a New Query (page 15)
- Assign a Task (page 56)
- Take the Telelogic Change User Interface Tour (page 33)

Run an Existing Report

This procedure runs any report that has already been defined and saved. You can choose from three types of reports:

- A personal report is stored in the **Personal** folder (or subfolder) and was defined and saved by you. If you use the same query over and over again, you should save it with your preferred format. This creates a report saved in your **Personal** folder or subfolder you specify.
- A shared report is stored in the **Shared** folder (or subfolder) and was created by another user and shared for use by others. The report will be visible in all databases running on the same server.
- A system report is a report that is stored in the **System** folder (or subfolder) and was defined by Telelogic and shipped as part of the Telelogic Change product, or was customized at your site. You can run these reports as is, or you can edit and save them to meet your personal needs. This creates a report saved in your **Personal** folder (or subfolder).

You can also view the results of reports you ran earlier by clicking **Previous Results.**

You can run any report in any folder.

1. On the Action Panel, click **Reports**.
2. Select **Immediately run report**, and specify whether you want to see the report in a new window (select **Show results in a new window**).

   Note If you are running a prompting report, the option to immediately run a report is ignored, since you must respond to the prompt before the report can be run.

3. Click **Personal**, **Shared,** or **System,** or a subfolder, as appropriate, and then select a report.

   The report runs automatically and is displayed for you.

   Or, if you are running a prompting report, make your choice from the list(s), then click **Run**.

   You can view the results, or use the results to Transition a Change Request (page 3). To transition, click a *transition name* link.

   OR

   To view the results of a report you ran earlier, click **Previous Results**, and then select **Recent** or **Saved**, depending on the report you want to view.

Related Topics

- View Results of Previously Run Reports (page 85)
- Run an Ad Hoc Report (page 21)

- Modify Multiple Change Requests (page 50) from report results
- Take the Telelogic Change User Interface Tour (page 33)

Design and Configure Your Home Page

This feature allows you to quickly view your most important reports by displaying them on a home page. You can easily design a unique home page or use a custom home page set up by your Telelogic Change administrator. You can select from five pre-defined layouts which allow you to choose the presentation most appropriate to the type of information you want to view.

You can create multiple home page reports, and easily view any of them by clicking on that home page in the list. You can also select one of them to be the default page you see when you log on to Telelogic Change or click Home from the Action Panel.

What do you want to do?

- View a Home Page (page 10)
- Add a New Home Page (page 11)
- Edit a Home Page (page 12)
- Delete a Home Page (page 13)
- Edit a Report on a Home Page (page 14)

Related Topics

- Save a Query as a Report (page 18)
- Run an Ad Hoc Report (page 21)

View a Home Page

1. Click **Home** from the Action Panel.

   Your default home page is displayed. In the navigation pane, you will see a list of all home pages designed by you, as well as any system home pages assigned to you by your Telelogic Change administrator.

2. Click the home page you want to view.

Related Topics

- Add a New Home Page (page 11)
- Edit a Home Page (page 12)
- Delete a Home Page (page 13)

Add a New Home Page

1. In the **Configure** list, click **Add Home Page**.
2. Enter the title. This name will be displayed in the **Home Pages** list, so use a meaningful name. This field is mandatory.
3. Select the layout of the home page that you want to use.

   For best results, to display a report with multiple columns, or a chart, use a wide (full row) format. For a narrower set of information, use a column.

   If you have selected a format with multiple columns, you are asked to specify the column widths. You can specify a percentage of the display to be used, or let the system decide the best fit by not specifying any numbers.
4. Click **Next**.
5. Expand **Change Requests** and/or **Tasks** to see a list of reports. You will see the same personal and shared ad hoc reports that are displayed when you click **Reports** on the Action Panel.
6. Specify the report to be used by dragging the report name to the box that represents the area of the report where the information will be displayed.

   If you have trouble dropping the report into the empty box, move the report until you see a darker line above or below the report name, and then release the report.

   > **Note** A folder must contain an ad hoc report (page 109) to be displayed here. If you do not see one of your personal folders, it is because that folder does not contain any ad hoc reports.
7. Click **Save**.

Related Topics

- Edit a Home Page (page 12)
- View a Home Page (page 10)
- Delete a Home Page (page 13)

Edit a Home Page

You can edit your home page from the home page.

To edit an individual report on the home page, see Edit a Report on a Home Page (page 14).

1. In the **Home Pages** list, click the title of the home page you want to modify.
2. In the **Home Page** title bar, click **Edit**.
3. Select a new format (optional), then click **Next** to change the reports that are included. Make the appropriate changes.

   You can also drag and drop reports in the editing process.
4. Click **Save**.

Related Topics

- Delete a Home Page (page 13)
- Add a New Home Page (page 11)
- View a Home Page (page 10)

Delete a Home Page

1. In the **Home Pages** list, click the title of the home page you want to modify.
2. In the **Home Page** title bar, click **Delete**.

   Note if you click **Delete** in the report title, you delete the report from the home page, and not the entire home page.

3. Confirm you want to delete the page.

Related Topics

- Add a New Home Page (page 11)
- Edit a Home Page (page 12)

Edit a Report on a Home Page

You can edit each report on the home page from the home page.

1. In the **Home Pages** list, click the title of the home page you want to modify.
2. In the title bar of the report you want to edit, click **Edit**.
3. Edit a Query (page 69) or Edit a Format (page 68), as appropriate.
4. Click **Save**.

Related Topics

- Edit a Home Page (page 12)
- Delete a Home Page (page 13)
- Add a New Home Page (page 11)
- View a Home Page (page 10)

Define a New Query

You can create a query and optionally save the query. Queries can have multiple values, precedence, date ranges, and relationships.

Queries are the building blocks for reports. A report consists of a saved query and a corresponding format.

1. On the Action Panel, click **Queries**.
2. Select **Change Requests**, **Tasks**, or **Objects** from the **Query for** list.

   If you are logged on to the central CR database, you can query only for change requests.
3. In the **Choose a Query** section of the **Queries** dialog box, click **New**.

   You will see the query builder in the **Query** tab.
4. Build a query by selecting the appropriate attributes, operators, and values displayed for you. Click **Add** to add to the query string.

   If you see the listbox icon next to the **Add** button, you can click it to add a dependency value.
5. After defining the query, you can save or share it by selecting **Save As** or **Share**.

   See Save a Query (page 16) or Share a Query or Format (page 75).
6. Then you need to choose the format for the query output. See Define a Format (page 65) to define a new format.

   Otherwise, choose an existing format by selecting the folder, then the format name in the **Choose a Format** section of the **Queries** dialog box.
7. You are now ready to run the query. In the **Perform Action** section of the **Query** dialog box, select where you want to see the results, and then click **Run**.

Related Topics

- Using the Queries Dialog Box (page 62)
- Transition a Change Request (page 3)
- Save a Query as a Report (page 18)
- Run an Ad Hoc Report (page 21)
- Define a Format (page 65)
- Take the Telelogic Change User Interface Tour (page 33)

Save a Query

After defining a query, you can save it and use it again, or edit it and create a new query. If you choose to save it, the query will be displayed in the **Personal** query folder or a subfolder of that folder.

1. On the Action Panel, click **Queries**.
2. Define a New Query (page 15), or Edit a Query (page 69).
3. If editing an existing query, click **Save**, otherwise click **Save As** in the upper right section of the dialog box to save a new query.
4. Enter a name and description. Remember to make the name descriptive enough so that you can identify it from the others listed in the folder.
5. If you are doing a **Save As** operation, select the folder where you want to save the query.
6. Click **OK**.

   You can verify the query was saved by selecting the appropriate folder and viewing the entries.

Related Topics

- Save a Query as a Report (page 18)
- Create a Prompting Query (page 19)
- Create a New Folder (page 87)
- Take the Telelogic Change User Interface Tour (page 33)

Save a Format

After defining a format, you can save it and use it again, or edit it and create a new format. If you choose to save it, the format will be displayed in the **Personal** format folder or a subfolder of that folder.

1. On the Action Panel, click **Queries**.
2. Define a Format (page 65), or Edit a Format (page 68).
3. If editing an existing format, click **Save**, otherwise click **Save As** in the upper right section of the dialog box to save a new format.
4. Enter a name and description. Remember to make the name descriptive enough so that you can identify it from the others listed in the folder.
5. If you are doing a **Save As** operation, select the folder where you want to save the format.
6. Click **OK**.

   You can verify the format was saved by selecting the appropriate folder and viewing the entries.

Related Topics

- Define a New Query (page 15)
- Save a Query as a Report (page 18)
- Create a New Folder (page 87)
- Take the Telelogic Change User Interface Tour (page 33)

Save a Query as a Report

After defining a query and selecting a corresponding format, you may want to save it as a report. This allows you to run it on demand, or even automatically run the report and display the results when you log into Telelogic Change.

You can share it with others as well. If you choose to share it, the report will be displayed in the **Shared** report folder. The report will be visible in all databases running on the same server.

1. On the Action Panel, click **Queries**.
2. Define a New Query (page 15), or Edit a Query (page 69).
3. Define a Format (page 65), or select an existing format.
4. In the **Perform Action** section, click **Save As** to save it in your **Personal** report folder (or subfolder), or **Share** to save it in the **Shared** report folder (or subfolder).
5. In the pop-up dialog, clearly define the report name and description.
6. Click **OK**.

   You can verify the report was saved by clicking **Reports**, then viewing the entries in the **Personal** folders or **Shared** folders, depending on how you saved the report.

Related Topics

- Edit a Report (page 80)
- Run an Existing Report (page 7)
- Run a Custom Query (page 73)
- Save the Output of a Query (page 74)
- View the Contents of a Query String (page 76)
- Create a Prompting Report (page 81)
- Create a New Folder (page 87)
- Take the Telelogic Change User Interface Tour (page 33)

Create a Prompting Query

If you do queries for similar sets of information, you can set up a prompting query, rather than construct a query and save multiple versions of it.

You probably have an existing query that you want to convert to a prompting query. It's easy to convert a query to one that prompts. Or if you want to create one from scratch first, Define a New Query (page 15), then start this procedure.

As a prompting query requires a response from you, it cannot be set to immediately run or be your part of your home page.

1. Open an existing query.
2. Select **Save As Prompting Query**.

   You will see the **Save As Prompting Query - Add Placeholders** dialog box. This is where you specify what is to be queried for by adding a placeholder, rather than a value.
3. In the query string, substitute placeholders for values. For additional information, see Learn More about Placeholders (page 77).
4. Click **Next** to display the **Save As Prompting Query - Customize Placeholders** dialog box.
5. Select the type or attribute that will be used in the query. Choose one of the **Types** to customize the values for which you are prompting. Choose one of the **Attributes** to use values matching the attribute's type and label.

   To specify a type, go to step 6. To specify an attribute, go to step 7. You can use a combination of both in your prompting query.
6. Select the appropriate **Types** value from the list. The type chosen determines the input field used in the prompting template.

   String shows you a text input box, **Date** shows you an input box plus a calendar icon, and **Listbox** shows you a list.

   - For a **String** or **Date** value, enter the **Label** to be displayed, then click **Next.**

     Skip to step 8 if you have no other placeholders.
   - For a **Listbox** value, do the following:
     a. Click **Edit Values**. You will see **Edit Values for Placeholder %*n*** dialog box.
     b. Type an entry in the field, then click **Add**. Repeat until your list is complete. You can re-order or delete entries by using the **Up**, **Down**, and **Delete** buttons.
     c. Click **OK**.
     d. Enter a label for the field.
     e. Add other types, as required. To add attributes, go to step 7. Else, click **Next**, and skip to step 8.

7. Select the appropriate **Attributes** value from the list. When you select an attribute, your query prompt will show the current values for that attribute. The attribute's **Type** and **Label** fields will be filled in for you. You can override the label field if needed, as may be the case if you have multiple prompts in the prompting query.
   - For any attribute value, do the following:
     a. Select the attribute, then change the label as required.
     b. To add or remove placeholders, click **Back** and repeat step 6 and/or step 7 for the remaining placeholders. Click **Next** when you are finished.
8. In the **Save As** dialog box, enter the name and description of the prompting query you just created.
9. In the **Folder** list, save it in the appropriate folder, as appropriate.
10. Click **OK**.
11. To check your query, select it from the appropriate folder. Set the values of the input fields, then choose a format and click **Run**. Click **Edit** to make any changes.

Related Topics

- Edit a Prompting Query (page 70)
- Learn More about Placeholders (page 77)
- Take the Telelogic Change User Interface Tour (page 33)

Run an Ad Hoc Report

This procedure describes how to define and run a new report. A report is composed of two parts: a query that defines the contents of the report, and the format, which defines how the information is presented. To create a new report, you must first define a query or use an existing query, and then specify the format to be used, either a new format, or one that is already saved. If you choose to save a report, it will be displayed in your **Personal** folder in the **Reports** dialog box. This type of user-defined report is called an ad hoc report (page 109).

1. On the Action Panel, click **Queries**.
2. Select **Change requests**, **Tasks**, or **Objects** from the **Query for** list.
3. In the **Choose a Query** section of the **Queries** dialog box, click **New**.

   You will see the query builder in the **Query** tab.
4. Build a query by selecting the appropriate attributes, operators, and values displayed for you. Click **Add** to add to the query string.

   After defining the query, you can save or share it by selecting **Save As** or **Share**.

   See Save a Query (page 16) or Share a Query or Format (page 75).
5. Then you need to create the format for the query output. See Define a Format (page 65) to define a new format.

   Otherwise, choose an existing format by selecting the folder, then the format name in the **Choose a Format** section of the **Queries** dialog box.
6. You are now ready to run the query. In the **Perform Action** section of the **Query** dialog box, select where you want to see the results, and then click **Run**.

   After running the report, you can save or share it by selecting **Save As** or **Share** in the **Perform Action** section of the Query builder.

   See Save a Query (page 16) or Share a Query or Format (page 75).

Related Topics

- Edit a Report (page 80)
- View the Contents of a Query String (page 76)
- View Results of Previously Run Reports (page 85)
- Take the Telelogic Change User Interface Tour (page 33)

Introduction

Telelogic Change is a generic change request (page 110) system that is web-based and integrated with Telelogic Synergy.

The following pages give you the basic information needed to use Telelogic Change in the User role (page 111):

- Telelogic Change Features (page 24)
- Standard Lifecycles and States (page 26)
- Customized Lifecycles and States (page 28)

In previous releases, Telelogic Change was named SYNERGY/Change. The product referred to as Telelogic Synergy was named SYNERGY/CM.

For access to all documentation and technical support, go to http://support.telelogic.com/synergy.

Telelogic Change Features

The following Telelogic Change features provide robust, automated support for change tracking:

- Change Requests, Tasks, and CM-Controlled Objects (page 24)
- Role-Based Interfaces and Security (page 25)
- Query and Reporting Features (page 25)
- Home Pages (page 25)

Change Requests, Tasks, and CM-Controlled Objects

Telelogic Change tracks requests for changes using *change requests*. A change request (page 110) is a database object that describes a change, including what the change is and who made the request. As you work on a change request you can modify its description, defer it for later consideration, transfer it to a different database, or even reject it.

Change requests often are sufficiently complex to require dividing them into smaller components you can track individually. Telelogic Change uses *associated tasks* to do this. Associated tasks, or task (page 112), is a database object that describes and tracks the parts of a change request. Tasks can also have associated objects, such as source files, if you are using Telelogic Synergy with Telelogic Change. These files are controlled objects in Telelogic Synergy.

The following figure shows Telelogic Change object relationships.

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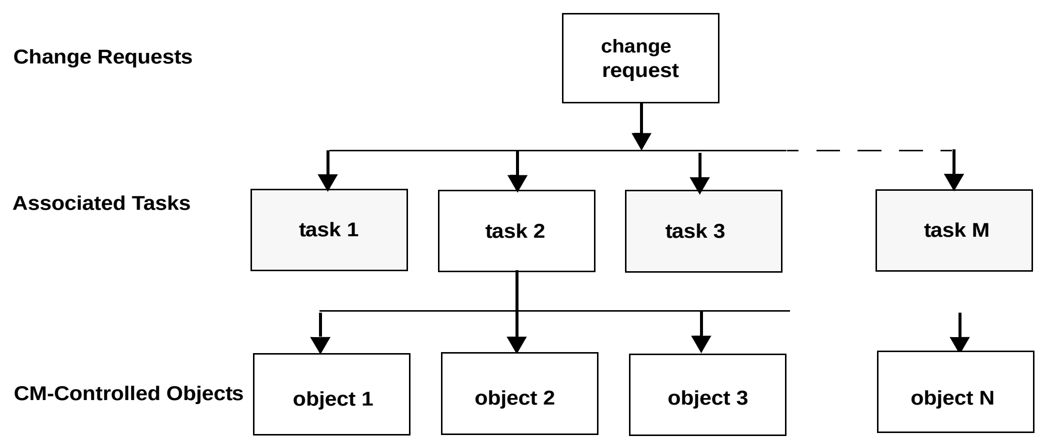


Role-Based Interfaces and Security

Telelogic Change ships with three role (page 111)s: *Admin*, *User*, and *ReportBuilder*. Telelogic Change ensures change request (page 110) database security using Telelogic Synergy privilege (page 111)s.

Note If your roles look different from the roles described here, they have probably been customized.

Query and Reporting Features

Telelogic Change enables you to generate reports on change requests or tasks using either predefined reports, or your choice of query and report formats. You can define custom reports or share reports with others. After creating the query and report formats you need, you can create folders to organize, manage, and share them with other users. Folder management operations are available as well.

Telelogic Change allows you to define prompting queries; these queries are easy-to-construct, flexible queries that use parameters you specify. You can match a prompting query with the desired output format and save it as a prompting report.

You can also use the reporting feature to perform bulk transitions and modifications. After running a report, you can easily modify or transition individually selected items, or a selection set you specify, from the report results. This time-saving feature provides an easy way to keep your information up to date.

If you are running Telelogic Synergy and you are a build manager or are interested in finding out about Telelogic Synergy builds, you can run queries to show you what is or isn't in the latest build. Several build queries are pre-defined in Telelogic Change.

Home Pages

Telelogic Change enables you to define a custom home page that you see each time you log on to Telelogic Change. This allows you to easily and quickly view the information you need most. Using queries and reports that you have previously defined, you can set up a list of information to be one click away. You can also use pages defined by your Telelogic Change administrator. If you have the *CR Process Admin* or *Home Page Admin* role, you can create home pages for any set of users that you define. This ensures that users can easily view important information on a timely basis.

Standard Lifecycles and States

A lifecycle (page 111) is a set of rules that govern how users can modify and transition change request (page 110)s. When you are logged in as *User*, one of the following lifecycles (and associated states) is active:

- Change Request Lifecycle and States (page 26)
- Task Lifecycle and States (page 27)

Change Request Lifecycle and States

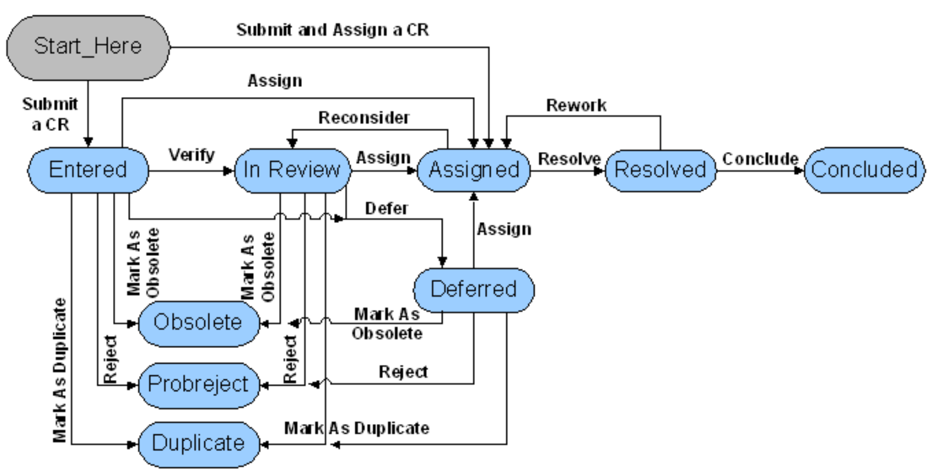
Your Telelogic Change administrator may have installed the *dev* CR Process (page 110). The states and transitions shown here are based on this process (page 111).

Note If your lifecycle looks different from the lifecycle shown in the figures, it has probably been customized. Use the help provided in the **More Info** links for information specific to your customizations.

For the *User* role (page 111), all new change requests begin in the *entered* or *assigned* state. The change request then progresses or *transitions* through each stage in the change request's lifecycle, and its state changes.

Ultimately, the change request is either concluded successfully, marked as a duplicate of another change request, made obsolete, or rejected.

The possible transitions and states for the dev process are shown in the following figure.

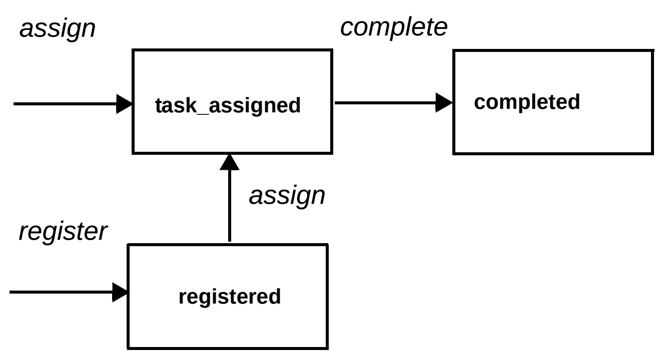


Task Lifecycle and States

You can create tasks during the assignment transition in a change request's lifecycle, or by using Telelogic Synergy.

All new tasks begin in either the *task_assigned* or *registered* (unassigned) state. (The *task_assigned* state is the default.) If the task is associated with a change request, you must transition the task to the *completed* state before you can resolve the change request.

The possible transitions and states are shown in the following figure.



Customized Lifecycles and States

Telelogic Change is a highly customizable product. Lifecycle and states can be changed from the standard process shipped with the product so that they reflect your site's own requirements and processes. The Telelogic Change administrator at your site is generally involved in defining and implementing the required customizations.

You may notice that the help for Telelogic Change makes references to customizations, as the help cannot always be specific about the button names and sequence of actions needed for a specific procedure. Telelogic Change provides a mechanism that so each site can document their own customizations. Customized help is referred to as CR Process-specific help, and can be launched from the **Help** dialog box. Additionally, if you click the **More Info** links appearing in dialog boxes, you will bring up additional customized help. Consult your Telelogic Change administrator for specific issues resulting from customized lifecycles and states.

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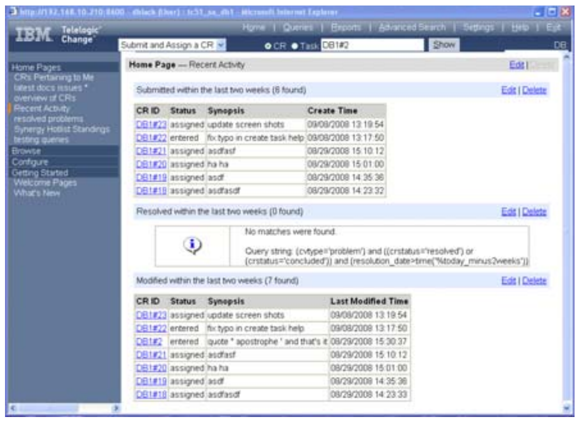
Getting Started Using Telelogic Change

The following pages describe how to log into and begin using Telelogic Change:

Take the Telelogic Change User Interface Tour

Any time you log on to Telelogic Change, you will see a Telelogic Change home page, which contains a left navigation pane and a pane for a user-defined report. You can design or use multiple home pages distributed to you, and you can select one to be the default login page.

Navigation pane



Home page report

Navigation Pane

The navigation pane provides easy access to a set of pages you define, or pages that are defined and distributed to you by your Telelogic Change administrator. These pages appear whenever you log on to Telelogic Change or press **Home** in the Action Panel. Clicking an item in the navigation pane list displays the corresponding information or opens a dialog box in the Dialog Panel for an action.

The following options are available in the navigation pane for users in the *User* role:

Home Pages

These pages show Telelogic Change home page reports that have been defined by you, and any pages defined by your Telelogic Change administrator and distributed to you.

Browse

This list includes all queries that you have defined as browsable queries.

Configure

This list of menu items allows you to add a home page, define browsable queries, and set your default home page.

Getting Started

This list of menu items allows you to view the welcome pages and see what is new in the current release.

The following options are available in the navigation pane for users in the *Admin* role. If you do not have the *CR Process Admin* or *Home Page Admin* role, you will not see these items in the navigation pane.

Administration

This list of menu items allows you to create default home pages, manage default browsable queries, and assign default home page and browsable queries to users/groups you define.

Default Home Pages

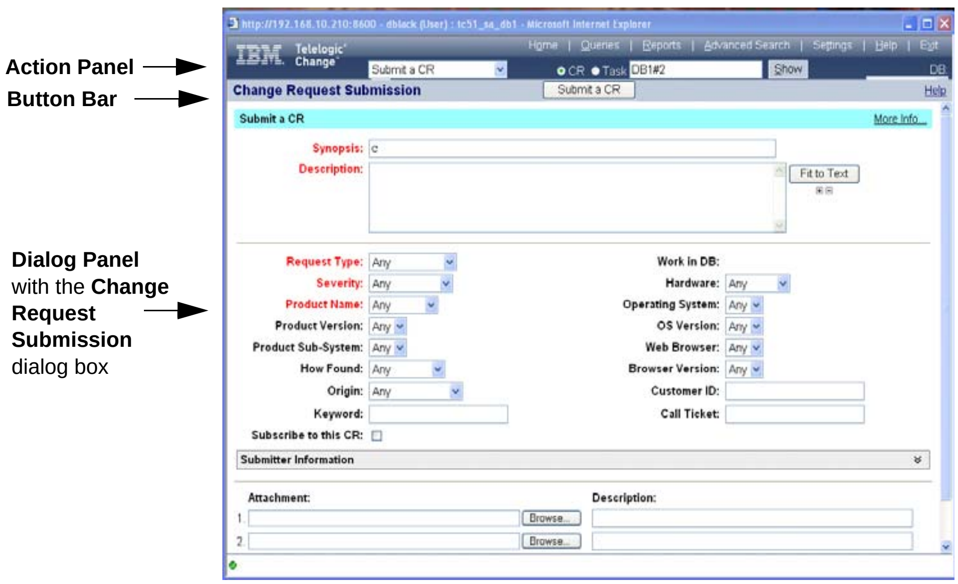
This list shows default home pages that have been defined.

Default Browse

This list shows default browsable queries that have been defined.

The Telelogic Change interface consists of a role (page 111)-based Action Panel (page 35), and a Dialog Panel (page 37) that changes when you click an Action Panel link.

The following figure shows a sample Telelogic Change window for change request submissions.



Action Panel

The Action Panel is the top row (with the grayscale background) in the Telelogic Change window and is where you start any operation (for example, **Queries**). Clicking a link displays the action's corresponding dialog box in the Dialog Panel.

The following options are available in the Action Panel for users in the *User* role:

Home link

Click to display your home page. You can easily design a custom home page or use one designed by your Telelogic Change administrator. By default, the home page shows the splash screen.

Queries link

Click to build and run a report by combining a query and report format.

Reports link

Click to run a report, either a new report or a pre-defined report.

Advanced Search link

Click to perform a search for change requests or tasks.

Settings link

Click to change your profile and preferences.

Help link

Click to display help for your role.

Note Click the **Help** link on each dialog box's button bar to display context-sensitive help.

Click **More Info** to display additional help specific to your process.

Exit link

Click to log out of Telelogic Change. This operation quits the Telelogic Change session and frees the session's resources.

Go button

Click to create a change request.

CR option button

Click, and then type a change request ID (page 110) into the adjacent change request/task box, to show details about, or perform another operation on, a change request.

Task option button

Click, and then type a task number into the adjacent change request/task box, to show details about a task (page 112).

Change Request/Task box (unlabeled)

Type the number of a change request or task, or enter search strings into this box.

Show button

Click to show or change the attributes of a single change request or task.

Search button

Click to do a quick search after entering information in the adjoining box.

DB list

Click to show a drop-down of all active databases. To access information in a different database, select the database. You do not have to log in to a different database as long as you want to be in the same role specified when you logged in initially.

Button Bar

Help link

Click the Help link on each dialog box's button bar to display context-sensitive help.

Dialog Panel

The Dialog Panel is the remaining portion of the Telelogic Change window and is where dialog boxes and the results of most operations are displayed.

The following graphics indicate the operation's status:

 A green check mark indicates success.

 A red "X" indicates failure.

 An "i" ("information") indicates that you should read the results dialog box to determine what happened.

If the graphic indicates failure, the accompanying text gives the reason for the failure. If you do not know how to correct the failure, contact your Telelogic Change administrator.

Start a Session

Starting a session requires the following:

- Supported browser. For a list of supported browsers, see the link on the Login page or view the Telelogic Change *Readme* file on the Telelogic Support web site.
- URL for your Telelogic Change installation
- User ID that has at least one of the Telelogic Synergy roles associated with the Telelogic Change login role you are using

Do the following to start a session.

1. Bring up a browser.
2. Surf to the URL for your Telelogic Change server.

   The URL will be something like `http://`*`hostname`*`:`*`port_number/`*.
3. In the Telelogic Change Login window, type your **User ID** and **Password**.
4. Press **Login**.
5. If you have access to multiple databases, select the database for your initial use.

   If you need to change databases after you log in, see Work in a Different Database (page 41).
6. In the **Role** list, click a Telelogic Change login role (page 111).

   Note Your login choices may differ slightly from these, depending on whether you have previously logged on to the database.
7. Press **Connect**.

   The Telelogic Change home page window appears.

   In the Dialog Panel you will see one of the following:

   - Telelogic Change splash screen
   - Home page showing one or more reports run automatically when you start a session

By default, you'll see the splash screen when you start a session. You can set a default home page or view any home page you design. You can also browse queries or view general information about Telelogic Change. For additional information, see Design and Configure Your Home Page (page 9)

View Your User Profile or Change Your Password

Your user profile contains personal information, including detailed contact information. The profile information is gathered from the Telelogic® Directory Server™ (TDS).

If permitted by TDS, you can change your password. If you cannot, contact your administrator for help.

> **Note** If your password is reset by the TDS administrator, you will be forced to reset your password the next time you log on.

1. On the Action Panel, click **Settings**.

   The **Settings** tabbed pages appear.

2. In the **Profile** section, view your personal information.
3. Click the **Password** tab. Enter your old and new passwords.
4. Click **Update**.

Related Topics

- Choose General Preferences (page 40)
- Set Report Preferences (page 83)

Choose General Preferences

General preferences specify default settings used when running Telelogic Change.

1. On the Action Panel, click **Settings**.

   The **Settings** tabbed pages appear.

2. Click the **General Preferences** tab.
3. In the **Default Font Size** list, select the font size to be used.
4. In the **Default Object Scope** group, set the default scope to be selected for queries and reports.
5. In the **Default Submit Form** list, select the form (dialog box) to use when submitting a CR.
6. In the **Show in CR Log** group, set the log scopes to be displayed, as appropriate. You can change this setting while viewing any log.
7. Click **Update** to save your preferences.

Related Topics

- Set Report Preferences (page 83)
- Design and Configure Your Home Page (page 9)
- Using the Home Page, Browse, and Configure Pages (page 93)

Work in a Different Database

- If you want to access information in a database other than the one where you logged in, and you want to work in the same role, select the new database from the **DB** field in the Action Panel.

  You do not have to log in again; however, the list will show only the databases where you are authorized to work.

- If you want to access information in a database other than the one where you logged in, and you want to have a different role, you must start a new session, and specify the new role and database.

Using Help

User help contains information about setting up and using Telelogic Change when you log in using the User role. Help is in HTML format and is designed to run on any platform using the supported browsers. Help uses frames to give you a fast and persistent way of finding information in the help system.

Your browser must be enabled to use cookies for Help to store and retrieve certain settings. If cookies are disabled, the Help system will not open with the last tab page you selected nor link to the Telelogic Synergy Web site.

Display context-sensitive help by clicking the **Help** link on the dialog box's button bar. View a different topic in this help by clicking its link in the text, in the Contents page, or in the Index. Click **More Info** to display additional help specific to your process.

You can also display help by clicking the **Help** link in the Action Panel.

> **Note** You can view help for your current CR Process (page 110) by clicking **More Info** where available.

More Procedures

You can display any of the following dialog boxes in the Dialog Panel when you log in as *User* and click an action link on the Action Panel.

- Using the Change Request Information Dialog Box (page 44)
- Using the Create New Task Dialog Box (page 52)
- Using the Attach Files to CR Dialog Box (page 53)
- Using the Task Information Dialog Box (page 55)
- Using the Change Request Submission Dialog Box (page 61)
- Using the Change Request Transition Dialog Box (page 54)
- Using the Queries Dialog Box (page 62)
- Using the Reports Dialog Box (page 79)
- Using the Manage Folders Dialog Box (page 86)
- Using the Advanced Search Dialog Box (page 92)
- Using the Home Page, Browse, and Configure Pages (page 93)
- Using the Administration Home Pages and Default Setting Dialog Boxes (page 97)
- Using the Settings Dialog Box (page 107)

Using the Change Request Information Dialog Box

Using the **Change Request Information** dialog box, you can show details about a single change request, change a change request's attributes, or transition the change request to the next state. You can edit only modifiable attributes in this dialog box.

What do you want to do?

- Submit a Change Request (page 1)
- Show or Modify a Change Request (page 2)
- Subscribe to a Change Request (page 47)
- Transition a Change Request (page 3)
- Modify Multiple Change Requests (page 50)
- Modify Multiple Change Requests (page 50)

Related Topics

- Create an Attachment (page 46)
- Create an Associated Task (page 45)

Create an Associated Task

This feature creates a task that is associated with the specified CR. You must be logged on to a development database in order to create tasks. You cannot create tasks if you are logged on to a central CR database.

This feature is also dependent on the process your administrator has defined. If you do not see an **Associated Tasks** field on your form, your site is not using this feature.

1. On the Action Panel, click the **CR** option button.
2. In the adjacent box, type a change request ID.
3. Press **Enter** or click **Show**.

   The **Change Request Information** dialog box appears.
4. Next to **Associated Tasks**, click **New**.
5. Set the task (page 112) properties.

   Note Be sure to set the required properties labeled in red.
6. Click **Assign** or **Register** to create the task.

   If you are creating a task for yourself, you can assign the task. If you are creating a task to be assigned later, you should register the task.

Related Topics

- Create an Attachment (page 46)

Create an Attachment

This feature creates an attachment that is associated with the specified CR.

This feature is dependent on the process your administrator has defined. If you do not see an **Attachments** field on your form, your site is not using this feature.

1. On the Action Panel, click the **CR** option button.
2. In the adjacent box, type a change request ID.
3. Press **Enter** or click **Show**.

   The **Change Request Information** dialog box appears.
4. Next to the **Attachments**, click **Attach Files**.
5. Type or **Browse** to select the attachment, and type a description.
6. Click **OK** to create the attachment.
7. Click **Close** after you are finished creating attachments.

   When you view a CR with an attachment, you will see the name of the file, as well as any added comments and the **Time Added** field. Note that this is the time the attachment was added to the change request, and not the create time of the file being attached.

Related Topics

- Search (page 5)
- Show or Modify a Change Request (page 2)

Subscribe to a Change Request

This feature enables you to stay informed about changes other users make to a specific change request. Once you subscribe to a change request, you will receive an e-mail every time the change request is modified. The only time you are not notified is when other users add themselves to the subscription list.

This feature is dependent on the process your administrator has defined. If you do not see a subscription field on your form, your site is not using this feature.

1. On the Action Panel, click the **CR** option button.
2. In the adjacent box, type a change request ID, or press **Go** to enter a new change request.
3. On the form, select the subscription check box.
4. Click **Save**.

Related Topics

- Show or Modify a Change Request (page 2)

Transition Multiple Change Requests

This feature enables you to transition multiple CRs at once. You can run a report showing the CRs you want to transition, and then perform a group transition, rather than have to transition each CR individually.

1. Run a report that includes the CR status.

The resulting intermediate report page lists the CRs with check boxes.

Use one of the following procedures listed below. If you run a report **without Paging selected**, you will see the entire report in one view.

- Run an Existing Report (page 7)
- Run an Ad Hoc Report (page 21)
- View Results of Previously Run Reports (page 85)

2. Select the CRs to transition.

> **Note** You can only transition multiple CRs that have the same status.

In the **Select** list box, click the state of the CRs to transition.

OR

In the **Select** list box, click **None**, and then select the CRs manually.

3. Click **Transition**.

The **Selection Set** dialog box appears, showing the selected CRs and links for their possible transitions.

4. In the selection set **Transitions** section, click a *transition name* link.

The **Change Request Transition** dialog box appears. The button on the button bar is labeled with the name of the transition. The **CR ID** field contains `<Selected items>`, indicating that this is a multi-object transition.

> **Note** The dialog box options depend on the transition you choose.
>
> You may not see a dialog box, depending on how the transitions have been customized.
>
> Also, an **Admin** transition link (page 112) is available if you have the administrator privilege (page 111) (for example, *pt_admin*). This link takes you to a new page on which you can select *any* transition.

5. Transition the change requests.

a. Enter the transition information.

Note Be sure to set the required properties labeled in red.

b. Click the *transition name* button.

Related Topics

- Transition a Change Request (page 3)

Modify Multiple Change Requests

This feature enables you to modify multiple CRs at once. You can run a report showing the CRs you want to modify, and then perform a group modification, rather than have to modify each CR individually.

Bulk modifications will be shown in the CR log, and will fire triggers if set up to do so. They are also subject to existing security constraints. After a bulk modification is complete, you will see a summary of the changes made, as well as cases where attributes could not be modified.

1. Run a report that includes the attribute(s) in the CR that you want to modify.

The resulting intermediate report page lists the CRs with check boxes.

Use one of the following procedures listed below. If you run a report **without Paging selected**, you will see the entire report in one view.

- Run an Existing Report (page 7)
- Run an Ad Hoc Report (page 21)
- View Results of Previously Run Reports (page 85)

2. Select the CRs to modify.

> **Note** You are required to modify all attributes in a dependency chain. For example, if you want to modify the Operating System attribute, you must also modify the Hardware and OS Version attributes.

In the **Select** list box, click the state of the CRs to be modify.

OR

In the **Select** list box, click **None**, and then select the CRs manually.

3. Click **Modify**.

The **Bulk Modify - Choose Attributes to Modify** dialog box appears, showing the available attributes for modification.

4. Select the attributes you want to modify to the **Available Attributes** field, then click **Add** to move them to the **Chosen Attributes** field.

The attributes and any dependent attributes are displayed.

5. Click **Next**.

The **Bulk Modify - Set Attribute Values** dialog box appears. Set the appropriate value(s).

> **Note** The dialog box options depend on the attribute to be modified.

6. Click **Modify** to change the selected CRs.

You will receive verification of the number of CRs that were modified.

If some modifications were unsuccessful, you will see an explanation as to why modifications could not be made.

7. Close the window.

Related Topics

- Show or Modify a Change Request (page 2)
- Transition Multiple Change Requests (page 48)

Using the Create New Task Dialog Box

Using the **Create New Task** dialog box, you can create a new task (page 112) for an assigned change request.

What do you want to do?

- Create an Associated Task (page 45)

Using the Attach Files to CR Dialog Box

Using the **Attach Files to CR** dialog box, you can create an attachment for a change request.

What do you want to do?

- Create an Attachment (page 46)

Using the Change Request Transition Dialog Box

Using the **Change Request Transition** dialog box, you can move a change request to the next state. The name of this dialog box depends on the transition you choose.

What do you want to do?

- Transition a Change Request (page 3)
- Transition Multiple Change Requests (page 48)

Using the Task Information Dialog Box

Using the **Task Information** dialog box, you can show details about a single task (page 112), change a task's attributes, or transition the task to the *completed* state. You can edit only modifiable attributes in this dialog box.

> **Note** When you are logged on to a development database and you enter a task number, the task must exist in the current development database for the task to be displayed. If the task is not in the database, you will see an error message.

What do you want to do?

- Assign a Task (page 56)
- Change the Attributes of a Task (page 57)
- Download Objects Associated with a Task (page 58)
- Show a Task (page 59)
- View Information about Objects Associated with a Task (page 60)

Related Topics

- Search (page 5)

Assign a Task

1. On the Action Panel, click **Task**.
2. In the adjacent box, type a task number.

   Note When you are logged on to a development database and you enter a task number, the task must exist in the current development database for the task to be displayed. If the task is not in the database, you will see an error message.

3. Press **Enter** or click **Show**.
4. Select the person to complete the task by selecting the name in the **Resolver** list.
5. Define the task sub-system and release.
6. Click **Assign**.

Related Topics

- Download Objects Associated with a Task (page 58)
- Show a Task (page 59)
- View Information about Objects Associated with a Task (page 60)

Change the Attributes of a Task

1. On the Action Panel, click **Task**.
2. In the adjacent box, type a task number.

   Note When you are logged on to a development database and you enter a task number, the task must exist in the current development database for the task to be displayed. If the task is not in the database, you will see an error message.

3. Press **Enter** or click **Show**.
4. Make the appropriate changes.
5. Click **Save** to save modifications, or if you want to complete the task, click **Complete**. Note that any objects associated with the task must be in a non-modifiable state to complete the task.

Related Topics

- Download Objects Associated with a Task (page 58)
- Show a Task (page 59)
- View Information about Objects Associated with a Task (page 60)

Download Objects Associated with a Task

1. On the Action Panel, click **Task**.
2. In the adjacent box, type a task number.

   > **Note** When you are logged on to a development database and you enter a task number, the task must exist in the current development database for the task to be displayed. If the task is not in the database, you will see an error message.

3. Press **Enter** or click **Show**.

   The objects displayed are the objects in the given database.

4. In the **Associated Object(s)** list, identify the object you need, and then click **Download**.

Related Topics

- Show a Task (page 59)
- View Information about Objects Associated with a Task (page 60)

Show a Task

1. On the Action Panel, click **Task**.
2. In the adjacent box, type a task (page 112) number.

   Note When you are logged on to a development database and you enter a task number, the task must exist in the current development database for the task to be displayed. If the task is not in the database, you will see an error message.

3. Press **Enter** or click **Show**.

Related Topics

- Assign a Task (page 56)
- Change the Attributes of a Task (page 57)
- Using the Queries Dialog Box (page 62) to look up a task

View Information about Objects Associated with a Task

1. On the Action Panel, click **Task**.

   Note When you are logged on to a development database and you enter a task number, the task must exist in the current development database for the task to be displayed. If the task is not in the database, you will see an error message.

2. In the adjacent box, type a task number.
3. Press **Enter** or click **Show**.
4. In the **Associated Object(s)** list, click the name of the object you want more information about. You will see associated objects from the database where it was found displayed.

Related Topics

- Download Objects Associated with a Task (page 58)
- Show a Task (page 59)

Using the Change Request Submission Dialog Box

Using the **Change Request Submission** dialog box, you can create a change request. Telelogic Change assigns the change request ID automatically. The new change request ID appears in the change request box in the Action Panel.

Click **More Info** to obtain dialog box information specific to your process.

What do you want to do?

- Submit a Change Request (page 1)
- Show or Modify a Change Request (page 2)

Related Topics

- Transition a Change Request (page 3)
- Modify Multiple Change Requests (page 50)
- Search (page 5)
- Create an Attachment (page 46)
- Create an Associated Task (page 45)

Using the Queries Dialog Box

The **Queries** dialog box allows you to create a change request or task report by selecting or defining a query, then selecting a format for the output. You will notice the **Queries** dialog box asks for the following three sets of information, which correspond to the information you must provide in order to execute a query:

1. Choose a Query - the query string you specify defines the contents of the query

2. Choose a Format - the format you specify defines the layout of the information

3. Perform Action - the action you specify (run a report, save a report, etc.) is executed

Simply provide information in the order requested to generate a query. After generating a query, you can easily change a query by changing the fields that are queried for, or change the look of the output by using a different format. You can also share a query so that others can use it.

Another helpful function of queries is to query for a set of CRs, and then modify or transition those CRs as a group, rather than one at a time.

> **Note** If you are logged on to the central CR database, you can query or report on CRs only, since the central CR database does not contain tasks.
>
> Results for task queries will vary, depending on which database you are logged on to. Tasks that are found via a direct top-level task query are tasks that exist in the user's current development database only.

You can also define queries so that they prompt you for information; this allows you to re-use a query so that it provides like sets of information for a given field or fields. For example, you can query for the same sets of information for different products, releases, months, etc. You can set up a prompting query so that you are prompted for one or more responses before the query is run.

Queries can be saved and are organized for you in different folders. These query types and folders are:

- A personal query is defined and saved by you, and then stored in the **Personal** folder. If you use the same query over and over again, you should save it with your preferred format. This creates a report saved in your **Personal** folder.

  If you have many different queries to manage, you can create folders within your personal folder. For example, if you construct prompting queries, you can save them in a separate folder named **Prompting** within your personal folder. This makes them easier to find and manage.

- A shared query is created by another user, shared by the user, and then stored in the **Shared** folder (or subfolder).

- A system query is either defined by Telelogic and shipped as part of the Telelogic Change product, or was customized at your site, and stored in the **System** folder (or subfolder). You can run these queries as is, or you can edit and save them to meet your personal needs. Any query you save is saved in your **Personal** folder (or Subfolder).
- A custom query has prompts that you must respond to before you can run the query. After making selections as required, you can proceed with the query process. Custom queries are stored in the **Custom** folder.
- A CM build query is defined by Telelogic and shipped as part of the Telelogic Change product. These queries are stored in the **CM Build Queries** folder.

As with queries, formats can also be saved and organized in folders. Formats are categorized in a similar way as queries, using **Personal**, **Shared**, and **System** folders (and subfolders).

When you save a query and its corresponding format, it becomes a report. For additional information about reports, see Using the Reports Dialog Box (page 79).

What do you want to do?

- Create a New Folder (page 87)
- Create a Prompting Query (page 19)
- Delete a Query or Format (page 67)
- Edit a Format (page 68)
- Edit a Query (page 69)
- Edit a Prompting Query (page 70)
- Modify Multiple Change Requests (page 50)
- Query for Telelogic Synergy Build Information (page 72)
- Save a Format (page 17)
- Save a Query (page 16)
- Save a Query as a Report (page 18)
- Save the Output of a Query (page 74)
- Share a Query or Format (page 75)
- View the Contents of a Query String (page 76)

Related Topics

- Run an Existing Report (page 7)
- View Results of Previously Run Reports (page 85)
- Create a Prompting Report (page 81)
- Create a New Folder (page 87)
- Using the Manage Folders Dialog Box (page 86)

- Learn More about Placeholders (page 77)

Define a Format

After creating a query, you need to select a format in order to view the query output. You can use either an existing format, or create a new format displaying exactly what you need. Once you define a format, you can use it with multiple queries, or make modifications to it, and save it as an additional format.

1. On the Action Panel, click **Queries**.
2. In the **Choose a Format** section of the **Query** dialog box, click **New** to define a new query format.

   To select an existing format, select the folder, and then the format name from the list.

   If you click **New**, do the following, otherwise go to the next step:

   a. In the **Format** tab, click the link for the format which best matches what you want your report to show.
   b. Enter a report title (optional).
   c. Select the attributes to be shown by selecting the attribute from **Available Attributes**, then clicking **Add**.
   d. After all the attributes you want to view are in the **Chosen Attributes** column, you can re-order them by using the **Up** and **Down** buttons, as required.
   e. In the **Sorting** section, define the sort criteria.
   f. Select the appropriate paging options.
   g. Click **Save As** to save the format (optional).
   h. Enter the format name and description, using a descriptive name so you can identify it from the list of saved formats at a later date.
   i. Click **OK**.
3. If you have already selected a query from the list in **Choose a Query**, you can run the query. Click **Run**.

Related Topics

- Define a New Query (page 15)
- Save a Format (page 17)
- Save a Query (page 16)
- Save a Query as a Report (page 18)
- Save the Output of a Query (page 74)

Move a Query or Format

You can move a query or format to a different folder. In order to keep your information in personal folders organized, you can move queries to other folders. You can move only those items in your **Personal** folder.

1. On the Action Panel, click **Queries**.
2. In the **Personal** folder, select a query or format from the list.
3. Click **Move** in the upper-right hand corner. Select the folder where you want to move it, or click **New** to create a new folder. Enter the folder name, then click **OK**.
4. Click **OK**.

Related Topics

- Define a New Query (page 15)
- Save a Query (page 16)

Delete a Query or Format

You can delete a query or format that you no longer need. In order to keep your lists in the personal folders manageable, you should delete unused queries or formats on a regular basis.

1. On the Action Panel, click **Queries**.
2. In the **Personal** folder, select a query or format from the list.
3. Click **Delete** in the upper-right hand corner. Confirm the delete operation by clicking **OK**.

Related Topics

- Define a New Query (page 15)
- Save a Query (page 16)

Edit a Format

1. On the Action Panel, click **Queries**.
2. In the **Choose a Format** section of the **Queries** dialog box, select the folder where the format you want to edit resides.
3. In the format list, click the format you want to change.
4. Modify the format as required.
    - After editing the format, save it by selecting **Save**. Update the description and then click **OK.**
    - If you want to create a new format, save it by selecting **Save As**. Update the name, description, and folder where you want to save the format, and then click **OK.**
    - To share the query, see Share a Query or Format (page 75).

Related Topics

- Define a Format (page 65)
- Save a Format (page 17)
- Delete a Query or Format (page 67)
- Define a New Query (page 15)

Edit a Query

1. On the Action Panel, click **Queries**.
2. In the **Choose a Query** section of the **Query** dialog box, select the folder where the query you want to edit resides.
3. In the query list, click the query you want to change.
4. Modify the query string as required.
   - After editing the query, save it by selecting **Save**. Update the description and then click **OK.**
   - If you want to create a new query, save it by selecting **Save As**. Update the name, description, and folder where you want to save the query, and then click **OK.**
   - To share the query, see Share a Query or Format (page 75).

Related Topics

- Define a New Query (page 15)
- Delete a Query or Format (page 67)
- Save a Query (page 16)
- Share a Query or Format (page 75)

Edit a Prompting Query

After creating a prompting query, you can edit it just like any query.

1. Open an existing prompting query.
2. Click **Edit**. You will see the **Edit Prompting Query** dialog box.
3. In the query string, make changes to the existing placeholders as required, or add new ones. You can have multiple prompts in a prompting query. For additional information about placeholders, see Learn More about Placeholders (page 77).
4. Click **Next** to display the **Edit Prompting Query - Customize Placeholders** dialog box.
5. Edit the **Types** or **Attributes** value used in the query.

   Edit or add a type, as required. Your query prompt will show the entries you defined for that type.

   - For a **String** or **Date** value, edit or enter the **Label** to be displayed, then click **Next.**

     Skip to step 7 if you have no other placeholders to edit.

   - For a Listbox value, do the following:

     a. Click **Edit Values**. You will see **Edit Values for Placeholder %*n*** dialog box.
     b. Update the entries in the listbox, as required. Repeat until your list is complete. You can re-order or delete entries by using the **Up**, **Down**, and **Delete** buttons.
     c. Click **OK**.
     d. Enter a label for the field.
     e. Edit or add other types, as required.

   Edit or add an attribute, as required. Your query prompt will show the current values for that attribute.

     a. Select the attribute, change the label as required, then click **Next**.
     b. Edit or add other attributes, as required.

6. Click **Next** when you have finished updating the placeholders.
7. In the **Save** dialog box, update the description of the prompting query you modified.
8. Click **OK**.
9. To check your query, select it from the appropriate folder. Set the value from the list you created, then choose a format and click **Run**. Click **Edit** to make any changes.

Related Topics

- Create a Prompting Query (page 19)
- Learn More about Placeholders (page 77)

Save a Prompting Query as a Regular Query

You can save an existing prompting query as a non-prompting query. This saves a version of the query after substituting all the placeholders with the currently selected values.

1. Open an existing prompting query.
2. Enter values in the prompting fields. You must enter information, or you cannot save the query as a non-prompting query.
3. Select **Save As**.

   You will see the **Save As** dialog box. Enter a new title and description for the regular query.
4. Select the folder where the query is to be saved.
5. Select **Query (non-prompting)** from the **Type** list.
6. Click **OK**.
7. Check the new query by selecting and running it. When you show the query, you will see the values that replaced the placeholders used in the prompting version of the query.

Related Topics

- Create a Prompting Query (page 19)

Query for Telelogic Synergy Build Information

Using the **Queries** dialog box, you can query for information about the contents of Telelogic Synergy builds. Several default queries are shipped with Telelogic Change to give you the information that you need. These queries prompt you for specific release information before performing the query.

As with all queries, you can create a report by saving a query and a corresponding format.

1. On the Action Panel, click **Queries**.
2. In the **Choose a Query** section of the **Query** dialog box, select the folder **CM Build Queries**.
3. In the query list, select the query you want to run. A brief description of each query is provided in the **Query** tab.
4. Enter the appropriate build information requested for the query.

   Then you need to define the format for the query output.
5. In the **Choose a Format** section of the **Queries** dialog box, select an existing format from the list, or click **New** to define a new format.

   To define a new format, see Define a Format (page 65).
6. You are now ready to run the query. In the **Perform Action** section of the **Queries** dialog box, select where you want to see the results, and then click **Run**.

Related Topics

- Define a Format (page 65)
- Save the Output of a Query (page 74)
- View the Contents of a Query String (page 76)

Run a Custom Query

One of the folder choices in **Choose a Query** is **Custom**. The number of custom queries available to you will vary, depending on the package template that is installed and the number of customizations done to the product. Custom queries have prompts that you must respond to before you can run the query. After making selections as required, you can proceed with the query process.

1. On the Action Panel, click **Queries**.
2. In the **Choose a Query** section of the **Query** dialog box, select the **Custom** folder.
3. In the query list, click the query you want to run.
4. In the **Query** tab, make selections for the available fields.
5. In the **Choose a Format** section of the **Queries** dialog box, select an existing format from the list, or click **New** to define a new format.

   To define a new format, see Define a Format (page 65).
6. You are now ready to run the query. In the **Perform Action** section of the **Query** dialog box, select where you want to see the results, and then click **Run**.

Related Topics

- View the Contents of a Query String (page 76)

Save the Output of a Query

After running a query, you may want to save the output to your local file system so you can view it at a later time.

1. On the Action Panel, click **Queries**.
2. Choose a query, or Define a New Query (page 15), or Edit a Query (page 69).
3. Choose a format, or Define a Format (page 65), or Edit a Format (page 68).
4. Click **Run** to run the report.
5. Click **Save As** in the upper right hand corner.
6. Enter a report name and define where the query is to be saved.
7. Click **Save**.

Related Topics

- Define a New Query (page 15)
- Define a Format (page 65)
- Save a Query (page 16)
- Save a Query as a Report (page 18)
- Run an Existing Report (page 7)

Share a Query or Format

After defining a query or format, you can share it with others. If you choose to share it, the query or format will be displayed in the **Shared** folder. The query or format will be visible in all databases running on the same server.

1. On the Action Panel, click **Queries**.
2. To share a query, choose an existing query, or Define a New Query (page 15), or Edit a Query (page 69).

   To share a format, choose an existing format, or Define a Format (page 65), or Edit a Format (page 68).
3. Click **Share** in the upper right section of the dialog box.
4. Enter a name and description. Remember to make the name descriptive enough so that others can identify it from other saved queries.
5. Select the folder where it is saved - this can be the **Shared** folder or one of its subfolders.
6. Click **OK**.

   You can verify the query or format was saved by selecting the **Shared** folder (or subfolder) and viewing the entries.

Related Topics

- Save a Query (page 16)
- Save a Query as a Report (page 18)

View the Contents of a Query String

Using the **Queries** dialog box, you can view the contents of an existing query. This allows you to be absolutely certain what a query is doing. This is particularly helpful when you want to make minor modifications to an existing query, or know what a shared query or a system query is doing.

1. On the Action Panel, click **Queries**.
2. In the **Choose a Query** section of the **Query** dialog box, select the **Folder**, and then the specific query you want to view.
3. On the **Query** tab, view the query in the **Query String** field.

Related Topics

- Define a New Query (page 15)

Learn More about Placeholders

How are placeholders used?

Placeholder keywords are locations in the query that are filled in by the user each time a query runs. For example, say you are a team lead, with Tom, Jane, and Joe on your team. You used to run separate queries to find out each team member's workload - you queried for Tom's assigned CRs, Jane's assigned CRs, and Joe's assigned CRs. Now you can create one query that prompts you for the resolver's name, and then shows the assigned CRs for that team member.

To construct this query, you will use a placeholder keyword instead of a specific name. Placeholder keywords use the form *%integer*, such as **%1**, **%2**, etc. Placeholder keyword values must always be supplied by you as part of the process of running the query. This is opposed to standard keywords, which are automatically provided by the system.

Placeholder keywords and standard keywords, e.g., *%username*, can be mixed in the same query string. Placeholders are recognized by their unique pattern; they are always an integer. For example, %% is interpreted as a literal percent sign if you want to include a percent in the query. Typing **"keyword='%%1'"** searches for CRs with keywords of **"%1"**, whereas a single % (**%1**), indicates a placeholder where the user must supply the value before the query is run.

The numbering of the integers used as placeholders determines the order that the placeholders' values are requested from you. The order the integers are used in the query is irrelevant. For example query **"release='%2' and owner='%1'"** will prompt you for the **owner** value before the **release** value.

Placeholders are reusable in the same query. You are prompted only once for each unique placeholder. The system replaces each occurrence of the same placeholder with the same value.

How do I define placeholders using existing values in the database?

When you want to choose from existing values for your prompting query, you select the attribute name that corresponds to the information on which you want to query. In the example given above, you want to choose from the team members who have been assigned CRs. In the example above, you would choose **Resolver** as the attribute on which to query. The system will prompt you with the users' names in the database. You can then select the team member on which to query, and run the query. Without redefining the query, you can select another team member on which to query.

Attributes are kept up-to-date as changes are made in the database. For example, if attribute types are modified in the lifecycle editor, the placeholder using that attribute will automatically be updated to reflect the change.

When do I use customized placeholders?

You can create customized placeholders by selecting the **Type** (as opposed to **Attribute**) when defining the placeholder. When selecting the **Type**, you define if the placeholder input is in the form of a string, date, or listbox. This setting determines the placeholder value when the information is collected.

For example, if you want to create a custom listbox, select **listbox** as the type, and then enter a set of values that will be shown as listbox choices in the prompt. This allows you to set up a manageable set of choices for the placeholder value, as opposed to having to enter a free-form string every time you run the prompting query. Placeholder listboxes are not shared, as they are used only for the particular placeholders of the particular prompting queries for which they are created.

Related Topics

- Create a Prompting Query (page 19)
- Edit a Prompting Query (page 70)
- Save a Prompting Query as a Regular Query (page 71)

Using the Reports Dialog Box

Using the **Reports** dialog box, you can run a report, save and share reports, and view results of reports which were run recently.

In the **Queries** dialog box, you selected or created queries and formats. When you save a combination of the two, you create a report. In the same manner as queries, reports can be saved and are organized for you in different folders. These report types and folders are:

- A personal report is defined and saved by you, and then stored in the **Personal** folder.
- A shared report is created by another user, shared by the user, and then stored in the **Shared** folder.
- A system report is either defined by Telelogic and shipped as part of the Telelogic Change product, or is customized at your site using the *ReportBuilder* role, and stored in the **System** folder. If you make changes to a report in the **System** folder and then save it, the new report is saved in your **Personal** folder.
- You can also view reports that you generated, even if you did not save them, by viewing reports in the **Previous Results** folder. Your Telelogic Change administrator sets the length of time that previously run reports are saved. Any report that you ran in the specified time will be listed, except for home page reports and the ad hoc chart reports listed in Define a Format (page 65).

What do you want to do?

- Edit a Report (page 80)
- Run an Existing Report (page 7)
- Run an Ad Hoc Report (page 21)
- Create a Prompting Report (page 81)
- Set Report Preferences (page 83)
- View Information from Telelogic Synergy (page 84)
- View Results of Previously Run Reports (page 85)

Related Topics

- Define a New Query (page 15)
- Save a Query (page 16)
- Save a Query as a Report (page 18)
- Modify Multiple Change Requests (page 50)
- View the Contents of a Query String (page 76)
- Create a New Folder (page 87)

Edit a Report

You can edit both the query and format for an existing ad hoc report.

> **Note** You cannot edit system-defined or ReportBuilder-defined components, nor can you edit queries or formats from a report in the System folder.
>
> Only build managers and CR process administrators can edit shared reports.

1. On the Action Panel, click **Reports**.
2. If the **Immediately run report** check box is selected, clear it.
3. Select a folder, then a report from the list.
4. Select the type of edit to be made.
   - To edit the query used in the report, select **Edit Query** in the report heading. This displays the currently defined query and allows you to make modifications. If you are editing a prompting report, you will be able to change, delete or modify placeholders in the prompting query. For placeholder information, see Learn More about Placeholders (page 77)
   - To edit the format used in the report, select **Edit Format** in the report heading. This displays the currently defined format and allows you to make modifications.
5. Click **Save** to save your modifications. If you edit both the query and format of a report, you will be performing the **Save** operation twice, once for each section.
6. To view the modified report, select it from the **Choose a Report** list, then click **Run**.
7. If you want to save the sort order of this report, click **Save As**. Click **Share** to add it to the **Shared** folder.

Related Topics

- Edit a Format (page 68)
- Edit a Query (page 69)
- Edit a Prompting Query (page 70)

Create a Prompting Report

You can combine a prompting query with a format and save them as a prompting report. This prompting report will display in the Reports explorer like any other report.

1. Open an existing prompting query by selecting it in **Choose a Query**.
2. Select a format that corresponds to the information in the query. Or Define a Format (page 65).
3. In the **Perform Action** section, click **Save As** to save it in your **Personal** report folder, or **Share** to save it in the **Shared** report folder.
4. In the pop-up dialog, clearly define the report name and description, and specify the folder where it is to be saved.

   Note You cannot use a prompting report as part of your home page (displayed at start-up).

5. Click **OK**.

   You can verify the report was saved by clicking **Reports**, then viewing the entries in the **Personal** folder or **Shared** folder, depending on how you saved the report.

Related Topics

- Create a Prompting Query (page 19)

Delete a Report

You can delete a report that you no longer need. In order to keep your list of personal reports manageable, you should delete unused reports on a regular basis.

1. On the Action Panel, click **Reports**.
2. If the **Immediately run report** check box is selected, clear it.
3. In the **Personal** folder, then a report from the list.
4. Click **Delete** in the upper-right hand corner. Confirm the delete operation.

Related Topics

- Delete a Query or Format (page 67)

Set Report Preferences

You can set preferences defining how reports are displayed. You can immediately run a report when selected (as opposed to viewing information about the report), and specify if the report and its associated information are shown in the a new window or not.

1. On the Action Panel, click **Reports**.
2. In the **Choose a Report** section, select **Immediately run a report** if you want to show the report when it is selected. If you want to view the report options dialog, or change the report name, clear this check box.
3. Select **Show results in a new window** to show the report in a new window. If you clear this checkbox, the **Show report links in a new window** operation is automatically selected.
4. Select **Show report links in a new window** if you don't want to replace the report results with the linked information.

Preferences are automatically saved when they are changed.

Related Topics

- Choose General Preferences (page 40)

View Information from Telelogic Synergy

After running any report displaying information about objects or tasks, you can access Telelogic Synergy using links in the report. Objects and tasks have a solid arrow that link you to pertinent information in Telelogic Synergy. These links are:

- For objects, you can link to **Find Use in Projects**, **History**, **Compare with Predecessor**, and **Properties** dialogs.
- For tasks, you can link to **Find Use in Baselines** and **Properties** dialogs.

You must have Telelogic Synergy installed and be able to run applets to use this integration. The integration must also be activated by your administrator and you must have the *developer* role.

1. On the Action Panel, click **Reports**.
2. Run an Existing Report (page 7), or Run an Ad Hoc Report (page 21).
3. Place your cursor over the link for the object or task you want more information about, and then click the menu item you want to open.
4. View the corresponding information in Telelogic Synergy.
5. Close the Telelogic Synergy dialog box.

Related Topics

- Define a New Query (page 15)
- Save a Query as a Report (page 18)

View Results of Previously Run Reports

1. On the Action Panel, click **Reports**.
2. Select **Previous Results.**
   a. The **Recent** tab shows reports that you have run in the past 24 hours by default. Your administrator may have changed this setting. Any report that you ran in the specified default time, even if you did not save a report, will be listed, except for home page reports and the ad hoc chart reports listed in Define a Format (page 65). You can sort the results by name and times by clicking the heading name.

      To save the report, click **Save As**, and enter a report name. The report will be moved from the **Recent** to the **Saved** list.

   b. The **Saved** tab shows reports that have previously been saved.
3. To view the results of any report listed, double-click the report name, or click **View**.

Related Topics

- Save a Query as a Report (page 18)

Using the Manage Folders Dialog Box

Using the **Manage Folders** dialog box, you can organize or clean up your personal folders and members of these folders. If you are the process manager or build manager, you can manage non-personal, e.g., shared, folders as well. Folders can be managed at the Queries, Formats, and Reports levels.

What do you want to do?

- Create a New Folder (page 87)
- Delete a Folder and All of its Members (page 88)
- Rename a Folder (page 89)
- Delete Folder Members (page 90)
- Move Folder Members (page 91)

Create a New Folder

1. On the Action Panel, click the button for the area where you want to create a folder.
    - For queries, click **Queries**, then from the **Folder** list for **Choose a Query,** select **Manage Folders**.
    - For formats, click **Queries**, then from the **Folder** list for **Choose a Format,** select **Manage Folders**.
    - For reports, click **Reports**, then click **Manage Folders** in the left pane.
2. In the **Operation** field, select **Create a new folder**.
3. Specify the hierarchy of the folder in the **Parent Folder** field.
4. Enter the folder name.
5. Click **OK**.

Related Topics

- Delete a Folder and All of its Members (page 88)
- Rename a Folder (page 89)
- Delete Folder Members (page 90)
- Move Folder Members (page 91)

Delete a Folder and All of its Members

1. On the Action Panel, click the button for the area where you want to delete a folder.
   - For queries, click **Queries**, then from the **Folder** list for **Choose a Query,** select **Manage Folders**.
   - For formats, click **Queries**, then from the **Folder** list for **Choose a Format,** select **Manage Folders**.
   - For reports, click **Reports**, then click **Manage Folders** in the left pane.
2. In the **Operation** field, select **Delete a folder (and all of its members)**.
3. Select the folder name from the list.
4. Click **OK**.

Related Topics

- Create a New Folder (page 87)
- Rename a Folder (page 89)
- Delete Folder Members (page 90)
- Move Folder Members (page 91)

Rename a Folder

1. On the Action Panel, click the button for the area where you want to rename a folder.
    - For queries, click **Queries**, then from the **Folder** list for **Choose a Query,** select **Manage Folders**.
    - For formats, click **Queries**, then from the **Folder** list for **Choose a Format,** select **Manage Folders**.
    - For reports, click **Reports**, then click **Manage Folders** in the left pane.
2. In the **Operation** field, select **Rename a folder**.
3. Select the folder name from the list.
4. Enter the new name.
5. Click **OK**.

Related Topics

- Delete a Folder and All of its Members (page 88)
- Create a New Folder (page 87)
- Delete Folder Members (page 90)
- Move Folder Members (page 91)

Delete Folder Members

1. On the Action Panel, click the button for the area where you want to delete the folder members.
   - For queries, click **Queries**, then from the **Folder** list for **Choose a Query,** select **Manage Folders**.
   - For formats, click **Queries**, then from the **Folder** list for **Choose a Format,** select **Manage Folders**.
   - For reports, click **Reports**, then click **Manage Folders** in the left pane.
2. In the **Operation** field, select **Delete folder members**.
3. Select the member names from the list.
4. Click **OK**.

Related Topics

- Delete a Folder and All of its Members (page 88)
- Rename a Folder (page 89)
- Move Folder Members (page 91)

Move Folder Members

1. On the Action Panel, click the button for the area where you want to move the folder members.
   - For queries, click **Queries**, then from the **Folder** list for **Choose a Query,** select **Manage Folders**.
   - For formats, click **Queries**, then from the **Folder** list for **Choose a Format,** select **Manage Folders**.
   - For reports, click **Reports**, then click **Manage Folders** in the left pane.
2. In the **Operation** field, select **Move folder members**.
3. Select the folder name where the members are currently stored from the **From Folder** list.
4. Select the members to be moved.
5. Select the folder name where you want to move the members in the **To Folder** list. Or to create a new folder, click **New**, then enter the new folder name.
6. Click **OK**.

Related Topics

- Delete a Folder and All of its Members (page 88)
- Rename a Folder (page 89)
- Delete Folder Members (page 90)
- Create a New Folder (page 87)

Using the Advanced Search Dialog Box

Using the **Advanced Search** dialog box, you can find change requests or task numbers that meet the free-text search criteria. You can also conduct a search based on matching attributes.

The report includes links to the items that were found. When you click a hyperlink, the **Show** dialog box is displayed for the object.

What do you want to do?

- Search (page 5)

Related Topics

- Define a New Query (page 15)
- Quick Search (page 4)

Using the Home Page, Browse, and Configure Pages

Using the **Home Page, Browse**, and **Configure** pages, you can select, create and edit pages of information to be displayed when you log on to Telelogic Change. You can view pages of your own design or those designed and distributed to you by your Telelogic Change Administrator.

What do you want to do?

- Design and Configure Your Home Page (page 9)
- Browse (page 94)
- Manage Browsable Queries (page 95)
- Set Your Default Home Page (page 96)

Browse

This feature allows you to quickly view the results of frequently used queries. First, you identify which queries that you want shown in the list (see Manage Browsable Queries (page 95)). Then you can view the results and do additional browsing as well.

1. On the Action Panel, click **Home**.
2. On the left navigation pane, click a query in the **Browse** list.
3. Expand the **Select Relationship to Browse** list, and select a relationship to browse (optional).
4. Click any CR in the list to view the details of the CR.
5. Expand the CR to view the results of the relationship browse you selected in step 3 (optional).

Related Topics

- Define a New Query (page 15)
- Manage Default Browse (page 103)

Manage Browsable Queries

You most likely have some queries that you use frequently and want to access easily. You can set up a list of queries to be displayed in the **Browse** list when you log in or click **Home**.

> **Note** If your Change configuration uses multiple servers, you need to create browsable queries for each server, as this information is stored separately by each server.

1. On the Action Panel, click **Home**.
2. On the left navigation pane, in the **Configure** list, click **Manage Browsable Queries**.

   In the **Available Non-Prompting Queries** list, you will see a list of queries that you saved in your **Personal** folder. To show queries in a different folder, select that folder from the list.

   Queries that you add to the **Browsable Queries** list will be displayed when you log on or click **Home**.
3. To copy a query to the **Browsable Queries** list, select it, then click **Add**.
4. Conversely, to remove a query, click **Remove**.
5. Click **Save** to save your changes.

   The **Browse** list is immediately updated.

   To view the query, select it from the **Browse** list.

   Click any CR in the list to view the details of the CR. You can also expand the query to view any related items.

Related Topics

- Browse (page 94)
- Define a New Query (page 15)

Set Your Default Home Page

You can specify the page that is displayed when you log on to Telelogic Change.

1. On the Action Panel, click **Home**.
2. On the left navigation pane, in the **Configure** list, **Set Default Home Page**.

   You will see a list of all the home pages you defined and the home pages that have been defined and distributed to you by your Telelogic Change administrator.
3. Click the button for the home page you want to be the default.
4. Click **Save** to save your changes.

   Click **Home** to view the home page you selected.

Related Topics

- Design and Configure Your Home Page (page 9)

Using the Administration Home Pages and Default Setting Dialog Boxes

Note If you do not have the one of the roles mentioned below, you will not see the **Administration** features displayed in the Telelogic Change interface.

If you have the *CR Process Admin* or *Home Page Admin* role, you will see a set of Administration features when you log on to Telelogic Change in the *User* role. Using the **Administration, Default Home Pages,** and **Default Browse** dialog boxes, you can design pages that your users can display to view information they use frequently.

Any default home page settings defined by a user will override default pages set up by you.

What do you want to do?

- Design and Configure Default Home Pages (page 98)
- Manage Default Browse (page 103)
- Assign Default Home Pages (page 104)
- Assign Default Browse (page 106)

Design and Configure Default Home Pages

This feature allows you to create home pages that can be used by any users of Telelogic Change. After defining a home page, you can assign it to individuals or groups. This helps to ensure that users are viewing the information that you think they need to know. You have the same five pre-defined layouts that are available to all users.

What do you want to do?

- Add a New Home Page (page 99)
- Edit a Home Page (page 100)
- Delete a Home Page (page 101)

Related Topics

- Assign Default Home Pages (page 104)

Add a New Home Page

1. Click **Create Default Home Page**.
2. Enter the title. This name will be displayed in the **Home Pages** list seen by users and in your **Default Home Pages** list, so use a meaningful name. This field is mandatory.
3. Select the layout of the home page that you want to use.

   For best results, to display a report with multiple columns, or a chart, use a wide (full row) format. For a narrower set of information, use a column.

   If you have selected a format with multiple columns, you are asked to specify the column widths. You can specify a percentage of the display to be used, or let the system decide the best fit by not specifying any numbers.
4. Click **Next**.
5. Expand **Change Requests** and/or **Tasks** to see a list of reports.You will see the same personal and shared ad hoc reports that are displayed when you click the **Reports** tab.
6. Specify the report to be used by dragging the report name to the box that represents the area of the report where the information will be displayed.

   If you have trouble dropping the report into the empty box, move the report until you see a darker line above or below the report name, and then release the report.

   > **Note** A folder must contain an ad hoc report (page 109) to be displayed here. If you do not see one of your personal folders, it is because that folder does not contain any ad hoc reports.
7. Click **Save**.

Related Topics

- Edit a Home Page (page 100)
- Delete a Home Page (page 101)

Edit a Home Page

1. In the **Default Home Pages** list, click the title of the home page you want to modify.
2. In the **Home Page** title bar, click **Edit**.
3. Select a new layout (optional), then click **Next** to change the reports that are included. Make the appropriate changes.

   You can also drag and drop reports in the editing process.
4. Click **Save**.

Related Topics

- Delete a Home Page (page 101)
- Add a New Home Page (page 99)
- Edit a Report on a Home Page (page 102)

Delete a Home Page

1. In the **Default Home Pages** list, click the title of the home page you want to delete.
2. In the **Home Page** title bar, click **Delete**.
3. Confirm you want to delete the page.

   You will see a message that the page has been deleted.

Related Topics

- Add a New Home Page (page 99)
- Edit a Home Page (page 100)

Edit a Report on a Home Page

You can edit each report on the home page from the home page.

1. In the **Home Pages** list, click the title of the home page you want to modify.
2. In the title bar of the report you want to edit, click **Edit**.
3. Edit a Query (page 69) or Edit a Format (page 68), as appropriate.
4. Click **Save**.

Related Topics

- Delete a Home Page (page 101)
- Add a New Home Page (page 99)
- Edit a Home Page (page 100)

Manage Default Browse

You know that many users are looking for the same sets of information. To this end, you can set up a list of queries to be displayed in the **Browse** list when the users log in or click **Home**.

1. On the Action Panel, click **Home**.
2. Click **Manage Default Browse**.

   In the **Available Non-Prompting Queries** list, you will see a list of queries that you saved in your **Personal** folder. To show queries in a different folder, select that folder from the list.

   Folders in the **Browsable Queries** list can be assigned to other users so that they appear when the users login or click **Home**.
3. To copy a query to the **Browsable Queries** list, select it, then click **Add**.
4. Conversely, to remove a query, click **Remove**.
5. Click **Save** to save your changes.

   The **Default Browse** list is immediately updated.

   To view the query, select it from the **Default Browse** list.

   Click any CR in the list to view the details of the CR.

Related Topics

- Assign Default Browse (page 106)

Assign Default Home Pages

After you have defined home pages, you can assign these pages to specific users or groups of users. This helps to ensure that users have easy access to information they may need on a regular basis. You can specify that pages can be added to their list of home pages, or appear as the default home page. Any personal default pages defined by a user will override default pages set up by you.

The following rules govern conflicts between admin- and user-defined home pages:

- If a user creates a home page with the same name as one created by the administrator, the user's home page will be displayed.
- If the user modifies a home page (for example, by adding or removing reports, re-ordering reports, etc.) that was distributed to him by the administrator, the user will see his own version of the report. If the administrator then changes and re-distributes the report, the user will still see his own report.
- If the administrator has defined a default home page for the user, and the user has his own default home page, the user's page is the default home page.
- Any home pages defined by the user are added to the set distributed by the administrator, so the user sees a list containing both sets in his **Home Pages** list.

Use the following procedure to distribute home pages to users.

1. On the Action Panel, click **Home**.
2. On the left navigation pane, in the **Administration** list, click **Assign Default Home Pages**.
3. In the **Sort by:** list, specify whether to show users or groups.

   The complete list is shown under the **All** tab, or the **Filter** tab can be used to show a subset of users.

   Use the filter **Everyone Else** to set home pages for everyone that does not have a specific setting, either as an individual user or as part of a group.

   The **Assigned** tab shows only the user/groups that have assignments.
4. To filter the list, select **Filter**, and enter a string to be matched, then press **Go**.
5. In the list of **Home Pages**, specify the following:
   a. To display home pages to the selected users or groups, click **Visible**.
   b. To select the default home page, click **Default**. Only pages previously defined as visible can be selected as default pages.

      Use **Select All** to set all home pages as accessible.

      Use **Clear All** to reset home pages to be non-accessible.

      Use **Copy Settings** to copy the settings of a selected user or group.

      Use **Paste Settings** to paste a set of copied settings to the current user, group, or multi-selected items.

6. Click **Save** to save your changes.

   The **Default Home Pages** list is immediately updated.

   The new home pages will be available to the users/groups you selected the next time they start a Change session.

Related Topics

- Design and Configure Default Home Pages (page 98)

Assign Default Browse

After you have defined default browse queries, you can assign these queries to specific users or groups of users. This helps to ensure that users have easy access to information they may need on a regular basis. You can specify that the queries be added to their **Browse** list.

1. On the Action Panel, click **Home**.
2. Click **Assign Default Browse**.
3. In the **Sort by:** list, specify whether to show users or groups.

   The complete list is shown under the **All** tab, or the **Filter** tab can be used to show a subset of users.

   Use the filter **Everyone Else** to set browsable queries for everyone that does not have a specific setting, either as an individual user or as part of a group.

   The **Assigned** tab shows only the user/groups that have assignments.
4. To filter the list, select **Filter**, and enter a string to be matched, then press **Go**.
5. In the list of **Browsable Queries**, specify which ones are to be displayed to the selected users or groups by clicking **Visible**.

   Use **Select All** to set all browsable queries as accessible.

   Use **Clear All** to reset browsable queries to be non-accessible.

   Use **Copy Settings** to copy the settings of a selected user or group.

   Use **Paste Settings** to paste a set of copied settings to the current user, group, or multi-selected items.
6. Click **Save** to save your changes.

   The **Default Browse** list is immediately updated.

   The new browsable queries will be available to the users/groups you selected the next time they start a Telelogic Change session.

Related Topics

- Browse (page 94)

Using the Settings Dialog Box

The **Settings** dialog box enables you to modify your Telelogic Change profile and preferences.

> **Note** If your Change configuration uses multiple servers, you need to define settings for each server, as user information is stored separately by each server.

What do you want to do?

- View Your User Profile or Change Your Password (page 39)
- Choose General Preferences (page 40)
- Set Default Submission Values (page 108)

Set Default Submission Values

The **Submission Preferences** tab allows you to designate default attribute values for submission forms. The values you can set vary, depending on the CR process you are using.

1. On the Action Panel, click **Settings**.

   The **Settings** tabbed pages appear.

2. Click the **Submission Preferences** tab.
3. Enter your default preferences.
4. Click **More Info** for information specific to your process.
5. Click **Update**.

Related Topics

- Submit a Change Request (page 1)

Terms and Concepts

ad hoc report

An *ad hoc report* is a report where the format is user-defined, that is, the user specifically selects the attributes.

If you choose a format and it shows the Available Attributes or Chosen Attributes listboxes, it ís an ad hoc report. Any report with fixed formats, such as those reports in the System folder, is not an ad hoc report.

central CR database

A *central CR database* contains CRs only, which in turn may be associated to tasks in multiple development databases. The central CR database is connected directly to the central server. There can only be one central server and one central CR database in a cluster.

central server

A *central server* stores CRs in the central CR database. There can be only one central server.

central server mode

The *central server mode* is a topology that consists of a central server, a set of remote servers, and a central CR database. In this setup, CRs are all stored in the same place, the central CR database, rather than being scattered across various databases.

change request

A *change request* is a database object used to track problem or enhancement requests.

change request ID

A *change request ID* is a number or a combination of characters used to identify a specific change request.

Complete Report

A *Complete Report* is a report that shows all change request attributes.

CR Process

A *CR Process* is a model for an organization’s change request tracking methodology.

A CR Process can be defined using multiple lifecycles, each of which represents a unique path in the process. A CR Process is implemented by installing a Telelogic-shipped process package (that is, `dev_process.xml`) or by defining the process in the Admin GUI.

development database

A *development database* contains tasks and objects (as opposed to CRs). It may be connected directly to a central server or indirectly through a remote server. If it is connected to a remote server, it is known as a *remote development database*.

format

A *format* defines the layout of the information generated by a query. You must select a format when generating a query or report.

lifecycle

A *lifecycle* is a set of rules that govern how users can modify and transition change requests. For example, the lifecycle controls how Telelogic Change moves a change request from one state to the next, such as from the *entered* state to the *completed* state.

privilege

A *privilege* is a Telelogic Synergy role.

process

A *process* is a set of lifecycles.

prompting query

A *prompting query* is a flexible query that asks you for values before it is executed. This allows you to easily modify the query each time you run it.

query

A *query* defines the content of a report. You must select a format when generating a query or report.

report

A *report* comprises two parts: a query that defines the contents of the report, and a format that defines how the information is presented. When you save a query and an associated format, a report is created and saved in your Personal folder.

role

A *role*, or *login role* (for example, *User)* determines which interface you see when you start Telelogic Change.

Standard Lifecycle

The *Standard Lifecycle* is the default lifecycle provided with a shipped CR Process file (for example, `dev_process.xml`).

In the Standard Lifecycle, a change request begins in the *entered* state and ends in the *concluded* state. For more information, see Standard Lifecycles and States (page 26).

subscription

A *subscription* to a change request allows you to stay current about any activities related to the change request. When you subscribe to a change request, you are automatically notified by e-mail of any modifications to a change request.

Telelogic Change

Telelogic Change is a generic change request management system that is web-based and integrated with Telelogic Synergy.

task

A *task* is a to-do list item that is assigned to a user. A task also tracks the files that were modified to complete it. You can associate one or more tasks with a change request.

transition link

A *transition link* is on the **Change Request Information** dialog box labeled with the name of a transition you can perform.

Clicking a transition link displays a pop-up window for that transition.

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