Telelogic DOORS

Using Telelogic DOORS for Serena Version Manager Interface

IBM

Telelogic DOORS for Serena Version Manager Interface

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Release 1.4

Before using this information, be sure to read the general information under the "Notices" chapter on page 29.

This edition applies to **VERSION 1.4**, **Telelogic DOORS for Serena Version Manager Interface** and to all subsequent releases and modifications until otherwise indicated in new editions.

Table of contents

1 About this manual

Welcome to Telelogic® DOORS for Serena Version Manager Interface™.

Telelogic DOORS for Serena Version Manager Interface transfers data between Telelogic® DOORS® (DOORS) and Serena® Version Manager™. It allows complete lifecycle traceability from requirements through to configuration management.

This manual describes how to use version 1.4 of Telelogic DOORS for Serena Version Manager Interface. It assumes that you know how to use both DOORS and Serena Version Manager.

Typographical conventions

The following typographical conventions are used in this manual:

Typeface or Symbol	Meaning
Bold	Book titles, important items, and items that you can select, including buttons and menus. For example: Click **Yes** to continue.
`Courier`	Commands, files, and directories; computer output. For example: Edit your `.properties` file.
>	A menu choice. For example: Select **File > Open**. This means select the File menu, then select the Open command from it.

Related documentation

The following table describes where to find information in the documentation set:

For information on	See
How to use Telelogic DOORS	The Telelogic DOORS documentation set
How to use Serena Version Manager	The Serena Version Manager documentation set

For information on	See
What's new in Telelogic DOORS for Serena Version Manager Interface 1.4	The Telelogic DOORS for Serena Version Manager Interface readme file
How to install Telelogic DOORS for Serena Version Manager Interface	*Telelogic DOORS Installation Guide*
How to set up licenses to use Telelogic DOORS for Serena Version Manager Interface	*Telelogic Lifecycle Solutions Licensing Guide*

You'll find PDF versions of the DOORS manuals on:

- The Telelogic Lifecycle Solutions DVD
- The support website at https://www.support.telelogic.com

2 Concepts

This chapter introduces Serena Version Manager Integration and explains the concepts you need to understand before using it:

- About Telelogic DOORS for Serena Version Manager Interface
- About Telelogic DOORS for Serena Version Manager Interface functions

About Telelogic DOORS for Serena Version Manager Interface

DOORS is the world's leading tool for creating, structuring and managing complex sets of requirements, such as those for a typical software development project. Serena Version Manager from MERANT Solutions, Inc. is a widely used source code control system.

Telelogic DOORS for Serena Version Manager Interface is a bridge between these two products, enabling complete lifecycle traceability from requirements through configuration management.

Telelogic DOORS for Serena Version Manager Interface allows software project teams to:

- Establish traceability from DOORS information to specific files, folders or file revisions in Serena Version Manager.
- Import release label information from Serena Version Manager to DOORS.
- Import promotion group information from Serena Version Manager to DOORS.
- Create DOORS baselines to match Serena Version Manager version labels.
- Generate complete reports on combined Serena Version Manager and DOORS configuration status.

About Telelogic DOORS for Serena Version Manager Interface functions

Telelogic DOORS for Serena Version Manager Interface provides two functions that are fundamental to integrating configuration management with lifecycle traceability:

- The ability to represent the configuration item structure stored in Serena Version Manager as a DOORS module.

In this operation, each folder, file and revision in the selected project is represented by a DOORS object in a hierarchy that represents the complete version tree for that project.

Once you have replicated the Serena Version Manager configuration item structure in a DOORS module, you can use normal DOORS link functions to establish traceability from project information stored in DOORS to the configuration items.

For example, a Serena Version Manager version object that implements a specific requirement can be directly linked to the corresponding DOORS requirement object. This allows you to demonstrate conformance to requirements at source-code level.

- The ability to baseline DOORS modules using the same version labels as the Serena Version Manager data.

  This operation uses another DOORS module to store a list of labels that exist in each project, and to create baselines automatically for groups of modules. Each baseline is recorded in the DOORS module, providing a configuration management record of which DOORS baselines relate to which Serena Version Manager labels. This function also provides the ability to create baselines for many DOORS modules simultaneously.

These two functions create a unified approach to both traceability and information release control, resulting in full lifecycle traceability and rigorous configuration management.

3 Importing from Serena Version Manager

This chapter describes:

- Importing from Serena Version Manager to DOORS
- Viewing Serena Version Manager information
- Understanding imported information
- Using DOORS traceability

Importing from Serena Version Manager to DOORS

This operation reads the complete structure of a Serena Version Manager project into a DOORS module, creating a DOORS object for each folder, file and revision. Key properties, version labels and promotion groups are also imported.

Telelogic DOORS for Serena Version Manager Interface uses the Serena Version Manager project root to locate a project. If you want to point to a different project, you must change the `PVCSRoot` entry in your registry. You may need to change the value of the `PVCSVersion` entry to reflect the version of Serena Version Manager that you are using (from 6.0. to 6.7).

Importing structures

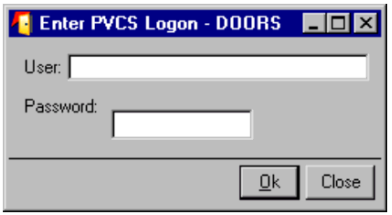
You can import into an empty module or into a module that already contains objects. Each Serena Version Manager project is always imported under its own top-level object.

Normally, you maintain your configuration item structure in a special module, though you might choose to store information for several projects in the same module. If you choose to do this, the new project is imported under a new level-one object at the end of the module.

To import from Serena Version Manager:

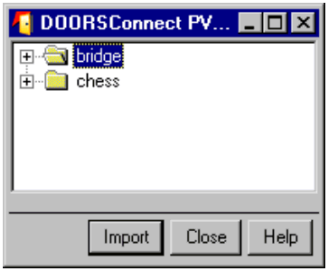
1. Open the target DOORS module.
2. From the DOORS menu, select **Serena Version Manager** then **Synchronize/import**.

The following dialog box is displayed:



3. Enter your username and password, then click **OK**.

   The following dialog box is displayed:



4. Click the plus signs (+) to display more folders or files within a project.
5. Select the project or files you want to import, then click **Import**.

   One or more command prompt windows (DOS boxes) appear briefly during the import, depending on your version of Serena Version Manager. This happens when Telelogic DOORS for Serena Version Manager Interface is communicating with Serena Version Manager. The command prompt windows disappear automatically when the process is complete.

   Note Command prompt windows will appear briefly whenever Telelogic DOORS for Serena Version Manager Interface communicates with Serena Version Manager.

   When the import is complete, the import report is displayed:

This window shows how many new items were created during the import, how many items were updated and how many were deleted.

For information on how to use the report window functions, see "Viewing Serena Version Manager information," on page 11.

Updating imported structures

It is likely that your Serena Version Manager data will continue to evolve after you have imported it into DOORS. Telelogic DOORS for Serena Version Manager Interface can synchronize existing imported data with the state of the Serena Version Manager projects, adding new folders, files, revisions, version labels and promotion groups as required.

To do this, select the DOORS module to update and repeat the procedure in "Importing structures," on page 7. This object appears at the top of the structure, usually the first object in the module. The following dialog box shows how many items have been created or updated:

If an item has been deleted from the project, the equivalent object in the DOORS module has the **PVM Deleted** attribute set to **True**. The object has not been deleted in order to maintain correct traceability in DOORS.

Imported attributes for structures

During the import process, Serena Version Manager data is stored as DOORS attributes. All Serena Version Manager-related attributes are distinguished by a **PVM** prefix.

The following attributes are used to store Serena Version Manager properties:

Attribute	Description
Object Heading	The name of the Serena Version Manager folder or file, or the number of the revision.

Attribute	Description
Object Text	The Serena Version Manager check-in comment for revisions.
PVM Archive Directory	The directory containing the archive.
PVM Archive Name	The name of the archive.
PVM Date	The date on which the element, version or branch was created.
PVM Deleted	The date on which the element, version or branch was deleted.
PVM Directory	The directory maintained by Serena Version Manager that corresponds to a folder. This attribute is only used when importing from a Serena Version Manager 6.0 database.
PVM Kind	Identifies the type of the object. Possible values are **Project**, **Folder**, **File**, **Label** and **Revision**.
PVM New	A boolean attribute that identifies new items added by importing or synchronizing data.
PVM Updated	The date on which the element, version or branch was updated.
PVM User	The name of the person who created the file or revision.
PVM Work Directory	The directory where the work file is stored for files, or the directory where work files are extracted for a folder.
PVM Work File	The name of the work file.

Telelogic DOORS for Serena Version Manager Interface also imports Serena Version Manager labels and promotion groups. These too are stored as DOORS attributes and the values are kept with each DOORS object.

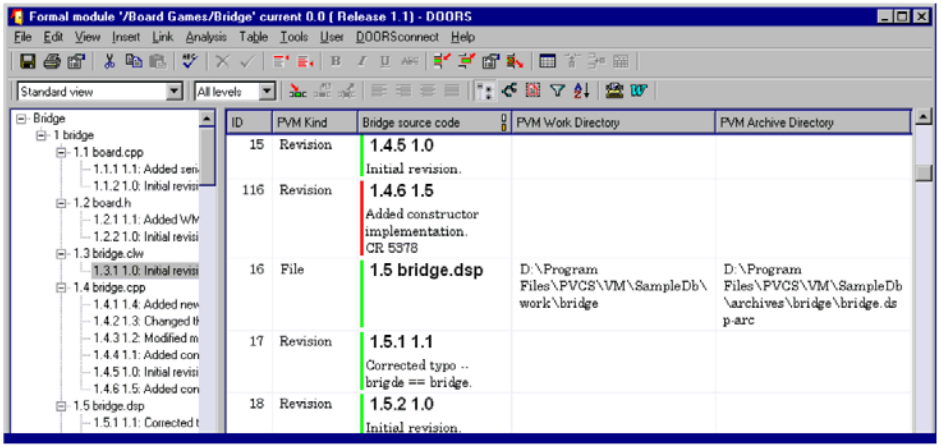
If you have a Serena Version Manager label **Release 1**, a DOORS attribute of type Boolean called **PVM Label Release 1** is created. All versions that are marked with that label will have the DOORS attribute set to **True**. A simple DOORS filter immediately shows which items belong to which release.

If you have a Serena Version Manager promotion group **QA**, a DOORS attribute of type Boolean called **PVM Promo QA** is created. When a revision belongs to that group, the attribute is set to **True**.

Telelogic DOORS for Serena Version Manager Interface also creates three attributes to store import metadata: **PVM Deleted**, **PVM New** and **PVM Updated**. These are set each time you import or synchronize and are the basis for the import report filters. You can create your own filters and views based on these attributes.

Viewing Serena Version Manager information

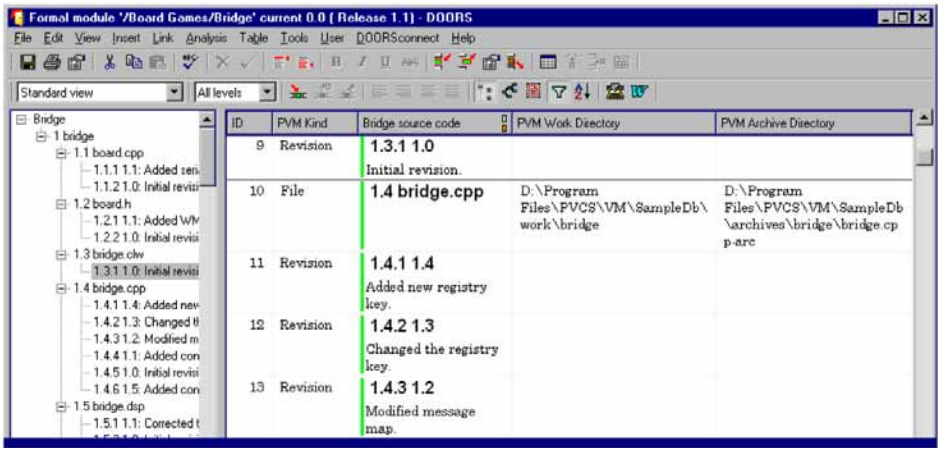
DOORS provides many useful ways of viewing imported Serena Version Manager information. It has the advantage of being able to put all relevant information into a single screen, as follows:



This is particularly useful for any updated information, which is clearly shown using the standard DOORS change bars. After an import, new or updated items have their change bars set to red, but the rest of the objects remain unchanged. For example, in the picture above you can see that one object has recently been added.

In the case of a re-import, you can use the **New items**, **Updated items** and **Deleted items** buttons in the Serena Version Manager Import Report window to show only the items that were new, updated, or deleted, as follows:

The following screenshot shows the data with a new or updated filter applied:



Understanding imported information

Serena Version Manager information is imported and turned into normal DOORS objects. This section explains how to interpret this information and how to get the best from it.

Graphics colors for structures

When each item is imported, it is assigned a background color, used in graphics mode. This helps provide instant visual recognition of the structure of your data.

The color allocations are as follows:

Type	Color
Project	Black (no color on normal DOORS background)
Folder	Green
File	Blue
Revision	Light blue

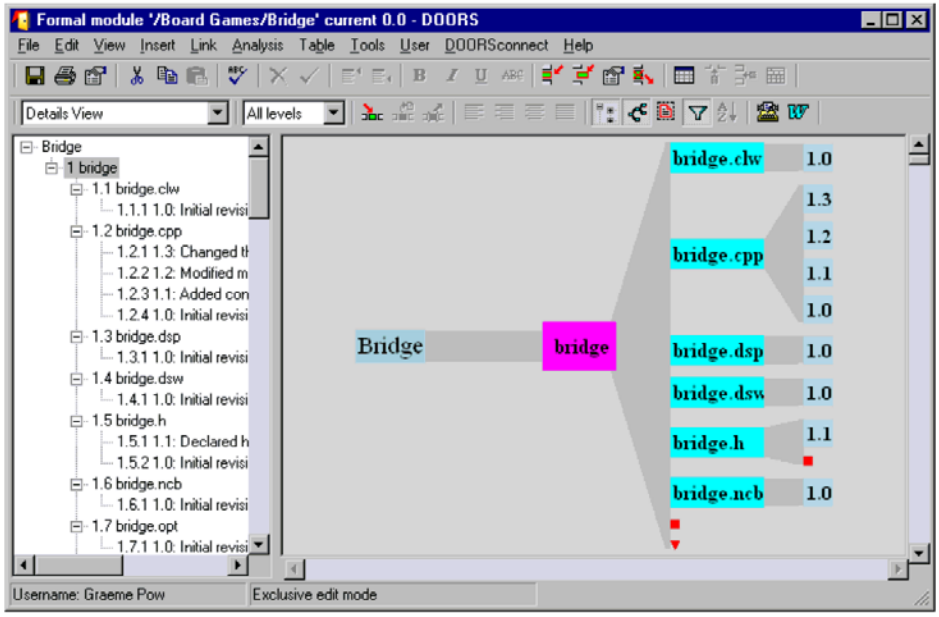
Version labels

Serena Version Manager version labels are typically used to mark which files were included in a particular release. Version labels are supplied when files are checked in and are a simple string such as **Patch 1.1**. The import process creates a

Boolean attribute for each label prefixing the label name with **PVM Label**. For this example, the Boolean attribute would be **PVM Label Patch 1.1**.

Each version that is labeled with a given name has the DOORS attribute set to **True**. This can be used in filters and gives instant indications of what versions were used in a given release.

The following screenshot shows an example of a label filter, set up by filtering on **PVM Label Release 1.0 equals True**:



Using DOORS traceability

Once imported into DOORS, the Serena Version Manager structure can be treated the same way as normal DOORS objects. This means that they can be included in your traceability schema. A typical application of this is to link source code modules to requirements in order to check which requirements have been met.

Link management

You can use any of the following standard DOORS methods for creating links between Serena Version Manager configuration items and other DOORS information:

- Drag and drop

- **Link > Create links**
- Link module matrix

In each case you must take the direction of each link into account to enable impact and traceability analyses to be performed. These analyses can be performed using the following standard tools:

- Pop-up menus
- **Analysis > Impact** or **Analysis > Trace**
- Layout DXL
- **Analysis > Wizard**

The last item, the analysis wizard, is particularly good for creating customized traceability reports. With this, you could create a report that shows the relationship between change requests and code check-ins, showing complete version names in the context of the change requests.

Links can be deleted by using any of the standard techniques.

Applications of imported structures

DOORS can be used to store any kind of structured information, so it is likely that you already have information that can be usefully linked to the configuration items. In addition to the classic application of requirements traceability, you can also build links from change requests, bug reports, design information, test plans and project plans to Serena Version Manager versions.

Once in place, you can demonstrate that specific changes have been implemented, or create reports that justify all checked-in changes.

Another application is to create complete product manifests. Using the DOORS export functions, you can create documents in Microsoft Word, HTML or any other supported format, that lists the document version included in a shipment.

4 Labelling DOORS baselines

This chapter describes:

- Importing Serena Version Manager labels into DOORS
- Creating DOORS baselines
- Understanding baseline information
- Using DOORS traceability

Importing Serena Version Manager labels into DOORS

Serena Version Manager labels are typically used to mark which files were included in a particular release. Version labels are specified when revisions of files are checked in.

DOORS baselines create frozen versions of modules that are similar to checked-in versions of files: they can be referenced, but not changed. Baselines are numbered progressively using major and minor versions, plus an optional text suffix.

Serena Version Manager version labels are ideal for DOORS baseline suffixes, where they can be used for the same purpose as in Serena Version Manager.

Baseline labelling is a two-step process: importing labels from a project module and creating baselines. The import process sets up a structure where a record of each baseline is kept. This section describes the import step while "Creating DOORS baselines," on page 19 describes baseline creation.

Importing labels

You can choose to import version labels into an empty module or into a module that already contains objects. The set of labels from each project is always imported under its own top-level object.

Normally you should maintain your label and baseline structure in a special module, though you might choose to store label information for several projects in the same module. If you choose to do this, the new project will be imported under a new level-one object at the end of the module.

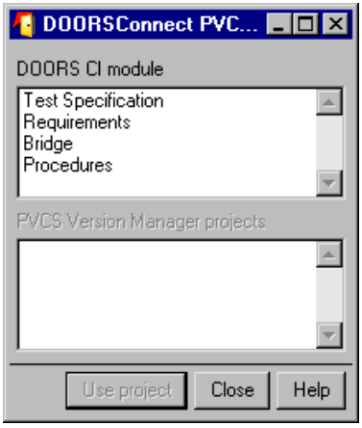
Before using the baseline labelling process you must import the required Serena Version Manager project into a DOORS module. The baseline process reads the version labels from this module.

Note You must be a DOORS database manager to perform this function. It performs irrevocable module baseline operations.

To import labels:

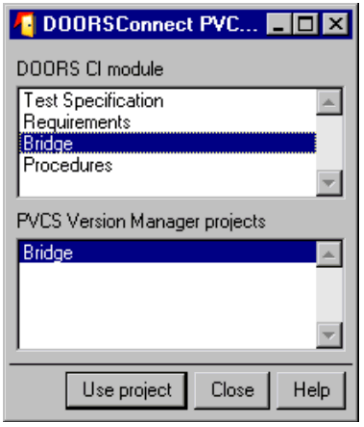
1. Open your target DOORS module. If the module is not empty, select a parent object for your imported structure.
2. From the DOORS menu, select **Serena Version Manager** then **Label baselines**.

   The following dialog box is displayed:



3. Select the DOORS module previously used to import the Serena Version Manager project.

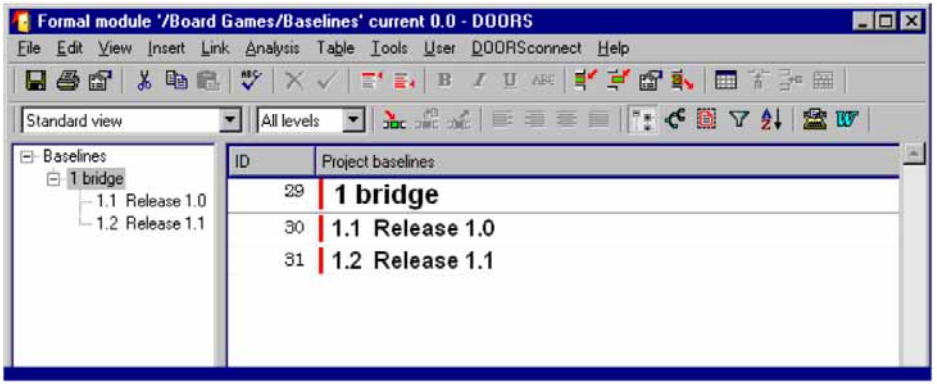
A dialog box is displayed, with one or more projects in the select box, as follows:



4. Select the project whose labels you want to use.
5. Click **Use project** to create the module structure.

   When the import is complete, the DOORS module is updated and the Apply Label to Modules window appears. For further information, see "Creating DOORS baselines," on page 19.

The following screenshot shows the label module after importing labels:



Re-importing labels

After you have completed this baseline labelling operation, you may want more Serena Version Manager labels. Telelogic DOORS for Serena Version Manager Interface can synchronize existing imported labels with the Serena Version Manager project, adding new labels as required.

To do this, after selecting the project object at the top of the label and baseline structure, repeat the procedure in "Importing labels," on page 15.

Imported attributes for labels

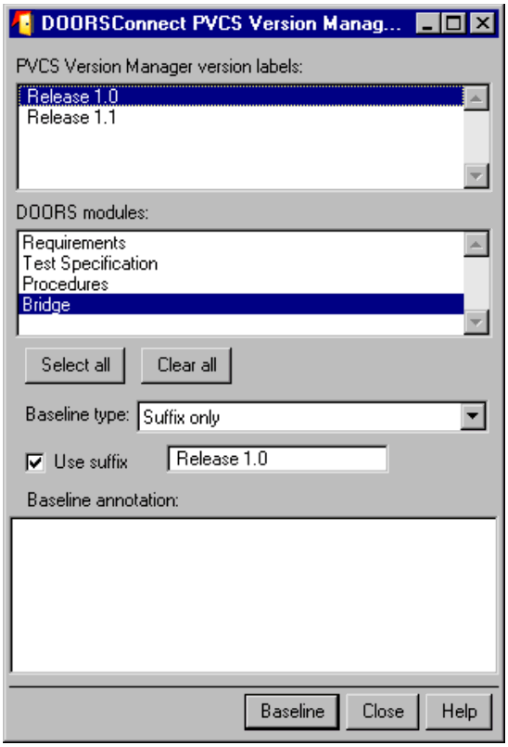
During the import process, Serena Version Manager data is stored as DOORS attributes. All Serena Version Manager-related attributes are distinguished by a **PVM** prefix.

The following attributes are used to store Serena Version Manager properties:

Attribute	Description
Object Heading	The name of the Serena Version Manager label.
Object Text	The Serena Version Manager comment for the label, specified when the label was created.
PVM Kind	Identifies the type of the object. Possible values are **Project**, **Label** and **Baseline**.
PVM User	The name of the person who created the label.
PVM Date	The date on which the label was created.

Creating DOORS baselines

Creating DOORS baselines is the second step of the import process. Baselines are created using the following dialog box, which is displayed when the import is complete:



To create labeled baselines:

1. Ensure that all needed DOORS modules are closed and not in use by anyone else.
2. Select the required label from the list in **Serena Version Manager version labels**.
3. Select the required module(s) from the list in **DOORS modules**. Use **Select all** and **Clear all** to simplify the selection process.
4. Select the type of baseline required: **Suffix only**, **Minor version**, or **Major version**.
5. Select whether to include a suffix by clicking **Use suffix**. The default suffix is the selected Serena Version Manager label. You can modify it if required.

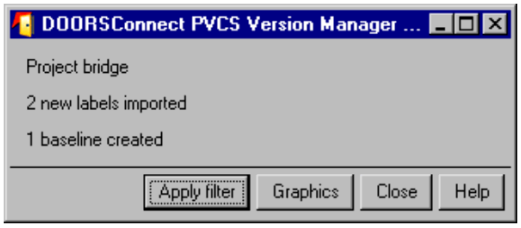
6. Modify the label comment, if necessary. It is used as annotation for the baseline.
7. Click **Baseline**. You are asked to confirm the operation, twice. Baseline creation requires exclusive, write access to all selected modules. This means you must ensure that no one else is using the modules.

Once a baseline has been created it cannot be destroyed or recreated, so you must be absolutely certain that a group baselining operation is correct before proceeding.

Baselines are created for each of the specified modules, and the label module is updated to contain a baseline-creation object for each module.

The attribute **PVM Baseline** is created and filled with the baseline name for each baseline-creation object.

When complete, the following dialog box is displayed, indicating how many labels and baselines were created:

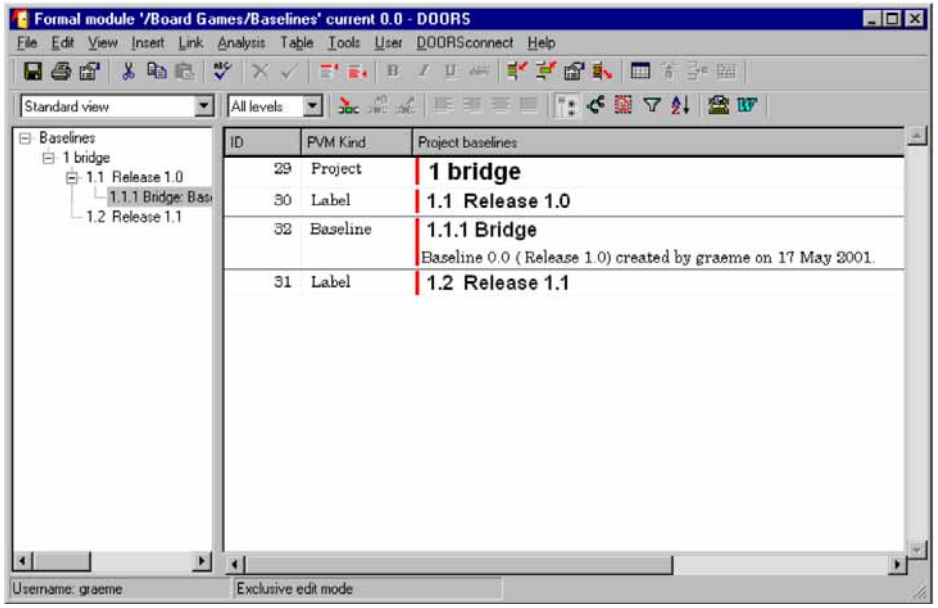


For further information on how to use the window functions, see "Understanding baseline information," on page 20.

Understanding baseline information

All the normal DOORS viewing mechanisms can be used on the label and baseline structure. The information can be displayed in either document or

graphics mode. Each object type has a color to aid visual identification. The following screenshot shows module baseline records created in column view:



Graphics colors for labels

When each item is imported, it is assigned a background color that is used in graphics mode. This helps provide instant visual recognition of the structure of your data.

The color allocations are as follows:

Type	Color
Project	Black (no color on normal DOORS background)
Label	Red
Baseline	Blue

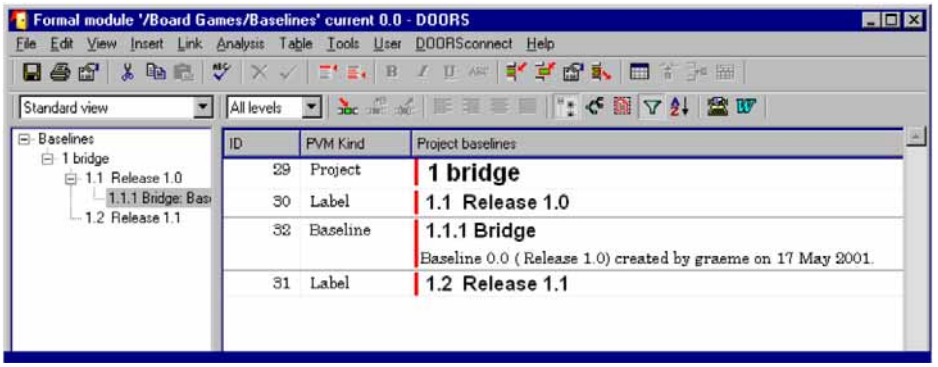
Viewing new baseline information

If you re-import labels or create new labels in the same module, you can use the Baseline Labelling Report window's **Apply filter** button to show only the newly-created items.

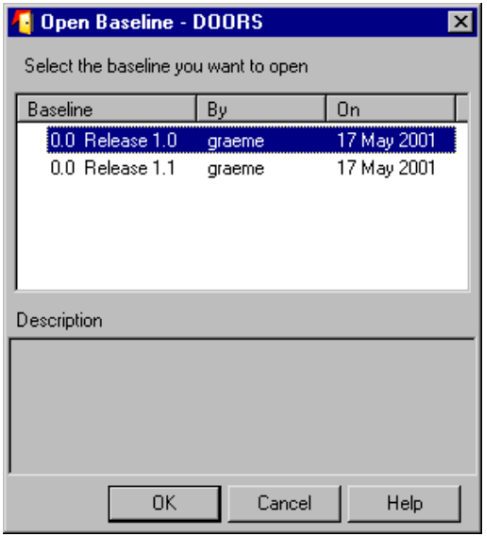
The following dialog box is displayed:

Click **Apply filter**.

The formal module is displayed with the filter applied:



The following screenshot shows the DOORS Open Baseline dialog box for a baseline created using a Serena Version Manager version label:



Using DOORS traceability

By storing information on labels and baselines in a DOORS module, they can be included in your traceability schema. In this way you can link details of released information directly to project plans and other applications, as outlined below.

Link management for labels

You can use any of the following standard DOORS methods for creating links between label and baseline objects and other DOORS information:

- Drag and drop
- **Link > Create links**
- Link module matrix

In each case, you must take into account the direction of links to allow impact and traceability analyses to be performed as required. These analyses can be performed using the following standard tools:

- Pop-up menus
- **Analysis > Impact** or **Analysis > Trace**
- Layout DXL
- **Analysis > Wizard**

The last item, the analysis wizard, is particularly good for creating customized traceability reports. With this, you could create a report that shows the relationship between code check-ins and module baselines, showing complete version names, baseline specifications and dates in the context of planning information.

Links can be deleted using any of the standard techniques.

Applications of imported labels

DOORS can be used to store any kind of structured information, so it is likely that you already have information in your data that can be linked to baseline records. You might associate particular module baselines with deliveries made to customers, meeting specific requirements.

Another application is to create complete product manifests. Using the DOORS export functions, you can create documents in Microsoft Word, HTML or any other supported format, that lists the document version included in a shipment.

5 Contacting support

This chapter contains the following topics:

- Contacting IBM Rational Software Support
- What to do before you contact Support
- Sending an automated problem report form
- Other information

Contacting IBM Rational Software Support

Support and information for Telelogic products is currently being transitioned from the Telelogic Support site to the IBM Rational Software Support site. During this transition phase, your product support location depends on your customer history.

Product support

- If you are a heritage customer, meaning you were a Telelogic customer prior to November 1, 2008, please visit the DOORS Support Web site on https://support.telelogic.com/doors.

  Telelogic customers will be redirected automatically to the IBM Rational Software Support site after the product information has been migrated.
- If you are a new Rational customer, meaning you did not have Telelogic-licensed products prior to November 1, 2008, please visit the IBM Rational Software Support site on http://www.ibm.com/software/rational/support/.

What to do before you contact Support

If your site has a designated on-site support person, please contact that person before you contact our Support team.

To help our Support team solve your problem, please have the following information available:

- Your name, title, company name, e-mail address, fax number and telephone number.
- Your support ID and support password.
- The version and build number of DOORS that you're running.

To get this information, run DOORS, and click **Help > About DOORS**.

- The operating system you're running DOORS on.
- What operating system your DOORS database is running on, if different.
- If you are reporting a new problem, please have a clear statement of the problem, including the exact text of any error messages produced by DOORS, your operating system, or any other tools that were running when the problem occurred.
- If you are calling about a problem you reported earlier, you need the original tracking number the Support team assigned to your problem.
- If you want, you can use the automated problem report form. For information, see "Sending an automated problem report form," on page 26.

The support center on our web site is at https://support.telelogic.com.

Sending an automated problem report form

To send an automated problem report to Support:

1. Select **Help > Generate Support Request**.

   The **Telelogic Support Information** dialog box is displayed with some of your product information automatically included.

   Review the information to make sure it's accurate.

2. From the **Impact** drop down list box, select the severity of the problem.
3. In the **Summary** box, summarize the problem.
4. In the **Problem** box, type a detailed description of the problem.
5. If available, attach a snapshot.

   Click either **DOORS Window Snapshot** or **Screen Snapshot**, whichever is applicable, and select the snapshot from your machine.

6. If possible, use the buttons in the **Attachment Information** area to add video capture, system details and files.

   Note The **Add Product Files** button is unavailable in DOORS. Product information is collected and added automatically.

   Add any relevant information to help Support resolve the problem.

7. You can either:

- Display the information you've entered in a new window so that you can copy it. For example, you may want to add this information to someone else's information.

  Click **Just Text (No Email)**.

- Open the email to edit it before sending it to Support.

  Click **Preview and Send** to submit the report.

Guidelines for writing a problem report

- Be as specific as possible when you summarize the problem in the **Summary** box and when you explain the situation and provide details in the **Problem** box. For example, "The system crashed when I tried to add an attribute" is more helpful than "It crashed."
- Indicate if there were any system changes, such as customizations or upgrades, before the problem occurred.
- If the problem is reproducible, list the specific steps to be followed in order to demonstrate the problem and also indicate the model you are using to perform the steps.
- In the problem description, include anything different or unusual that you observed before the problem happened.
- Make screen captures of anything that you feel will help and attach them to the problem report.
- Include any error messages and code samples you have related to the problem.
- If you have multiple unrelated questions or issues, please submit them separately.

Automatic responses and recording defects

When you send the online form to Support, the customer service system immediately searches the Knowledge Base based on the **Summary** and **Problem** descriptions you entered. If there is an exact match of your problem in the knowledge base, the system automatically sends an email to you with a pointer to the most likely solution.

The problem is also automatically recorded in the defect tracking system as assigned to a support representative. This representative works with you to be certain that your problem is solved. The defect tracking system also records new problems with their solutions in the Knowledge Base to provide rapid assistance for other customers.

Automatically generated problem reports

If your DOORS system crashes, it displays a message asking if you want to send a problem report about the crash to DOORS Support.

If you decide to send this generated report, the system displays the same online form that is available from **Help > Generate Support Request**. In this case, the form contains information about the crash condition, in addition to the information that is usually filled in describing your system.

Add any more information that you can to help the Support staff identify the problem before you click the **Preview and Send** button.

Changing the email address of the problem report

If you want to send the problem to someone other than DOORS Support, for example to your internal support, you can change the default email address of the problem report.

To change the email address of the problem report:

1. Open **System** in the **Control Panel**.
2. On the **Advanced** tab, click **Environment Variables**, then click **New** under **variables**.

   The **New User Variable** window is displayed
3. In **Variable Name** enter **ILX_RECIP**, the variable that controls the address used by the problem report.
4. In **Variable Value** enter the email address you want to use.
5. Click **OK** to add the value.
6. Click **OK** to save the value in the environment variables.
7. Click **OK** to save the value in the system properties.

Other information

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