

# Using SLIM-DataManager® 10.2 SmartSheets

## Overview

The two SLIM-DataManager SmartSheets in this package provide a spreadsheet-style interface for exchanging project data with SLIM-DataManager 10.2. Both SmartSheets are powered by the SLIM-DataManager 10.2 Application Programming Interface (API):

- **SLIM-DataManager 10.2 SmartSheet for Data Collection** is a Microsoft Excel-based tool that lets the user enter historical project data into a spreadsheet-based form that mimics the SLIM-DataManager 10.2 user interface. A single, new project record can then be imported into a new or existing DataManager workbook using the SLIM-DataManager 10.2 API.
- **SLIM-DataManager 10.2 SmartSheet for Data Extraction** is a Microsoft Excel-based tool that exports all project records from the specified SLIM-DataManager 10.2 .smp file to Microsoft Excel for analysis outside SLIM-DataManager.

## SLIM-DataManager Data Collection SmartSheet



**Description:**

SLIM-DataManager® SmartSheet for Data Collection is a Microsoft® Excel®-based tool that lets the user enter historical project data in a spreadsheet-based form that mimics the SLIM-DataManager user interface. A single, new project record can then be imported into a DataManager workbook, using the DataManager API. Existing project records can be updated by editing the original data entry form used to create the project record.

**Directions:**

1. Enter project data into the worksheet tabs (similar to the tabs in DataManager).
2. Enter the fully qualified file name of the source DataManager 10.1 workbook (Input Workbook).
3. If desired, you may save the projects from the source file plus the newly added project to another workbook. To do so, enter the fully qualified file name of the workbook to be saved to. (Existing workbooks will be overwritten.)
4. Press the **Add or Update Project** button.

\* Cells outlined in red are mandatory.  
\* Cells filled in dark taupe are read-only.  
\* Custom metrics cannot be imported.

Input Workbook ( SMP )

To save updates/new records to a copy of the input workbook, supply a path and desired filename here.  
If the file already exists, it will be overwritten.

(Optional)  
Save As Filename ( SMP )

To save updates/new records to the input workbook, leave this field blank.

Clear Project Data

Add or Update Project

Introduction

Basic Information

Application

Sizing

Accounting

Quality

Review

+

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This tool allows clients/project personnel who don't have a SLIM-Suite license to enter data for a single completed project into a Microsoft Excel spreadsheet. The completed spreadsheet can be saved and sent back to a licensed SLIM-DataManager client, who can use the SmartSheet to automatically import the project record to an existing (or new) DataManager .smp file via the API.

Worksheets available in the Data Collection SmartSheet:

1. **Introduction Worksheet.** This sheet allows a licensed SLIM-DataManager user to select a source (input) workbook and add data for a single project record (as defined in the remaining worksheets or tabs) to an existing or newly created workbook.
2. **Data Entry Worksheets: Basic Information, Application, Sizing, Accounting, Quality, and Review.** These worksheets mimic the data entry property sheets in the SLIM-DataManager user interface with a few simplifications: e.g., custom metrics are not exposed, and sizing data is limited to the primary function unit and a limited set of languages and secondary function units. Data entry fields are generally text/numeric free-form fields or drop down lists of selectable values. Comments (indicated by a red triangle in the upper right) are provided to provide more specific information about each field.

Note: When adding projects to a DataManager database, values for fields like Countries, Monetary Units, Function Units, Development Machine Type, Operating System Type, Language, or Keywords, the SLIM-DataManager database must already contain the 'lookup' values being set via the API. For example, if the Country in the spreadsheet does not appear in the selection list when using the DataManager GUI, use the **<Add new entry>** item at the bottom of the list to enter the desired value to your DataManager database file, then save the target database(s) before using it with the Data Collection spreadsheet.

Project ID 46: RRFIN (Record 46 of 52)

Basic Information | Application | Sizing | Accounting | Custom Metrics | Quality | Review

Project Summary

Organization: National Banking

Division:

Country: United States

Design Complexity:

Application Type: %s

Microcode:

Realtime:

Avionic:

System:

C and C:

Development Classification: Minor Enhancement (5-25% new)

Industry Sector: Military, Electronics, Engineering, Financial

Predominant Development Machine

Type:

Specific: IBM 3090

Predominant Operating System

Type:

Specific:

Buttons: Delete, First, Prior, Next, Last, Add, OK, Cancel, Help

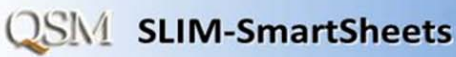
Following are some suggestions for use:

- Always work with a copy of this SmartSheet. Use the **Clear Project Data** button to clear out the data on the six data entry tabs if appropriate. Review each data entry tab, completing fields that are fairly standard for your organization, e.g., Organization Name, Division, Size Acronym, Predominant Application Type, etc. Save the SmartSheet; you may want to give it a unique name designed for different divisions, customers, or project types. This in effect allows you to set up unique templates for data entry.
- When the remaining fields have been completed by the data provider for a specific project, suggest they save the completed spreadsheet using a meaningful naming convention, e.g., DivisionA\_ProjX.xlsm.
- When the data from one or more of these spreadsheets is ready to be added to a master database (SMP file), make sure your input workbook has been set up with default settings you want to use (for instance, phase acronyms, default monetary unit and effort unit) via the **Tools | Customize Global Options** menu item in SLIM-DataManager. Designate this workbook as your source (input) SMP file on the **Introduction tab**. Note that if the file already contains one or more project records, the new project record will be appended to the existing records. One exception to this is if the project name matches an existing project in the input workbook, then that project will be overwritten with the new data.
- Optionally, you may specify a SaveAs workbook name. This has the effect of copying the projects from the source (input) database and adding a single new or updated project to a new workbook. (WARNING: If the specified output file already exists, existing project data can be overwritten.) If this field is left blank, the new project will be saved to the original source workbook.

## SLIM-DataManager 10.2 Data Extraction SmartSheet

This spreadsheet is designed to allow you to specify an existing SLIM-DataManager 10.2 workbook (on the Introduction tab), click the 'Extract Projects' button, and export a tabular summary of the projects in your database to a worksheet, one row per project. The data can then be reviewed, exported to a CSV file, or otherwise used as needed.

Because the DataManager SmartSheets are powered by the DataManager API, note that only data fields available via the API will be exported. Custom metric data, though available via the API, is not implemented in the SmartSheet and will not be exported.



**Version 10.2**

**Description:**  
SLIM-DataManager® SmartSheet for Data Extraction is a Microsoft® Excel®-based tool that reads all the projects in a SLIM-DataManager 10.1 workbook and displays the data in a tabular format. The data can then be exported to a CSV file or otherwise used as needed.

**Directions:**  
1. Enter the fully qualified file name of the source DataManager workbook (Input Workbook).  
  
2. Click on the 'Extract Projects' button.  
  
3. Select the Exported Data tab to view the data.

**Input Workbook ( SMP )**

Extract Projects

51 project(s) have been successfully extracted.

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