

Using SLIM-DataManager[®] SmartSheets

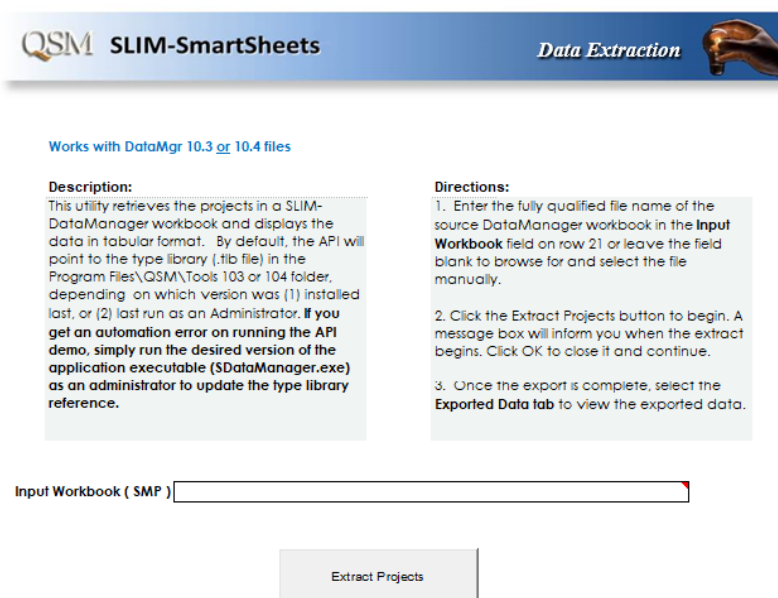
Overview

The two SLIM-DataManager SmartSheets in this package provide a spreadsheet-style interface for exchanging project data with SLIM-DataManager 10.3 or 10.4. Both SmartSheets are powered by the SLIM-DataManager 10.3 Application Programming Interface (API):

- **SLIM-DataManager Data Extraction SmartSheet** is a Microsoft Excel-based tool that exports all project records from the specified SLIM-DataManager 10.3 or 10.4 .smp file to Microsoft Excel for analysis outside SLIM-DataManager.
- **SLIM-DataManager Data Importer SmartSheet** is a Microsoft Excel-based tool that lets the user map historical project data contained in a separate spreadsheet (the example in the demo package actually uses data extracted into Excel using the Data Extraction SmartSheet!). Once mapping data has been provided to match fields in the source spreadsheet with their SLIM-DataManager metric counterparts, multiple project records can then be imported into a new or existing DataManager database file using the SLIM-DataManager 10.3 API.

SLIM-DataManager Data Extraction SmartSheet

The Data Extraction spreadsheet allows you to specify an existing SLIM-DataManager 10.3 or 10.4 workbook on the Introduction tab, click the **'Extract Projects' button** on the **Introduction** worksheet, and export a tabular summary of the projects in your database to the **Exported Projects** worksheet, one row per project. The data can then be reviewed, analyzed in Excel, or otherwise used as needed.



QSM SLIM-SmartSheets Data Extraction

Works with DataMgr 10.3 or 10.4 files

Description:
This utility retrieves the projects in a SLIM-DataManager workbook and displays the data in tabular format. By default, the API will point to the type library (.tlb file) in the Program Files\QSM\Tools 103 or 104 folder, depending on which version was (1) installed last, or (2) last run as an Administrator. **If you get an automation error on running the API demo, simply run the desired version of the application executable (SDDataManager.exe) as an administrator to update the type library reference.**

Directions:
1. Enter the fully qualified file name of the source DataManager workbook in the **Input Workbook** field on row 21 or leave the field blank to browse for and select the file manually.
2. Click the Extract Projects button to begin. A message box will inform you when the extract begins. Click OK to close it and continue.
3. Once the export is complete, select the **Exported Data tab** to view the exported data.

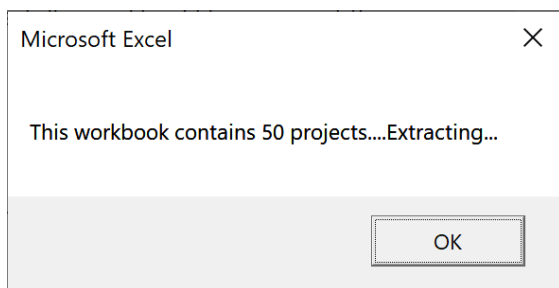
Input Workbook (SMP)

Extract Projects

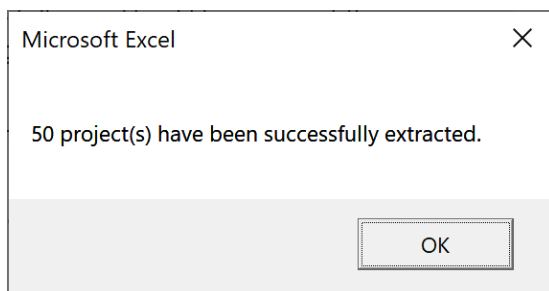
Getting Started

To begin the extract, type the path to your source DataManager database (.smp) file in the **Input Workbook** field, or leave it blank to browse to and select a database manually. Since the DataManager 10.3 API works with both version 10.3 and 10.4 workbooks, users with both versions installed may need to update some registry entries to run this utility.

By default, the API will point to the type library (.tlb file) in the Program Files\QSM\Tools 103 or 104 folder, depending on which version was (1) installed last, or (2) last run as an Administrator. If you get an automation error on running the API demo, simply run the desired version of the application executable (SDataManager.exe) as an administrator to update the type library reference. Next, click the **Extract Projects** button. Confirmation messages will inform you when the extract begins. Click OK to close the first message box and proceed.



Once the extract has completed, another confirmation message will appear.



Click OK to close the message box, then display the **Exported Projects** tab to see the exported data. Selecting and extracting data from a new database with different projects will clear all previously extracted data from the **Exported Data** tab.

Project													
Project Name	Organization	Division	Preparer	Domain	AppType	App SubType	Industry	Sector	Country	Complexity	Classification	Description	
Northeast Sys	FiberTel	Sys Labs		Software	Telecom	Switches	System Integrators	Unknown	United States	High	Major Enhancement (2)	Handles entire switching system for	
Southeast Sys	FiberTel			Software	Telecom	Unknown	Utilities	Unknown	United States				
Ethernet Analysis	FiberTel			Software	Telecom	Unknown	Utilities	Unknown	United States				
PR Sys	FiberTel			Software	Telecom	Unknown	Utilities	Unknown	United States				
Pacific Sys	FiberTel			Software	Telecom	Switches	Utilities	Unknown	United States				
Mid-Atlantic Sys	FiberTel			Software	Telecom	Unknown	Utilities	Unknown	United States				
Midwest Sys	FiberTel			Software	Telecom	Unknown	Utilities	Unknown	United States				
Fiber Optic Phase II	Telecom Gen			Software	Telecom	Switches	Utilities	Unknown	United States	Moderate	Major Enhancement (2)		
Fiber Channel Switch Telecom Gen				Software	Telecom	Switches	Utilities	Unknown	United States	High	New Development		
Fiber Channel Bench Telecom Gen				Software	Telecom	Switches	Utilities	Unknown	United States				
ISDN Comps	Telecom Gen			Software	Telecom	Unknown	Utilities	Unknown	United States	Moderate	New Development		
Fiber Channel Phase Telecom Gen				Software	Telecom	Switches	Utilities	Unknown	United States	High	New Development		
Graphics Engine	Binary Systems			Software	Business	Unknown	Military	Unknown	United States				
File/Fort Control Syst	Binary Systems			Software	Business	Unknown	Military	Unknown	United States				
Fiber Channel Phase Telecom Gen				Software	Telecom	Switches	Utilities	Unknown	United States	High	Major Enhancement (2)		
Fiber Optic Testing S Telecom Gen				Software	Telecom	Switches	Utilities	Unknown	United States	Low	Minor Enhancement (5)		
GGS Reserves	High Street Financial			Software	Business	Financial Mgmt	Military	Unknown	United States	Moderate	New Development		
Mutual Fund Mgmt	High Street Financial			Software	Business	Financial Mgmt	Military	Unknown	United States	Moderate	Minor Enhancement (5)		
Req Control	High Street Financial			Software	Business	Unknown	Military	Unknown	United States	High	New Development		
Online Customer Mgr	High Street Financial			Software	Business	Customer Care	Military	Unknown	United States	Moderate	Minor Enhancement (5)		
Benefits Package Asst	Binary Systems			Software	Business	Human Resources	Financial	Unknown	United States	Moderate	Major Enhancement (2)		
Multi-Tasking Oversee	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	Low	Minor Enhancement (5)		
ACC Maintenance	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	Moderate	Major Enhancement (2)		
HES/SYN Systems	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	Low	New Development		
Database Entry Hand	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	Low	Conversion (<5% new)		
Report Writer Engine	National Banking			Software	Business	Unknown	Financial	Unknown	United States	High	New Development		
Database Support	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	High	New Development		
PGA	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	Moderate	Major Enhancement (2)		
USTA	Binary Systems			Software	Business	Unknown	Financial	Unknown	United States	Moderate	Conversion (<5% new)		
Rental Mgmt	Global Energy Systems			Software	Business	Sales	Utilities	Unknown	United States	Low	New Development		
Line Collection	Global Energy Systems			Software	Business	Unknown	Utilities	Unknown	United States	Moderate	New Development		
Introduction Exported Data													

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.

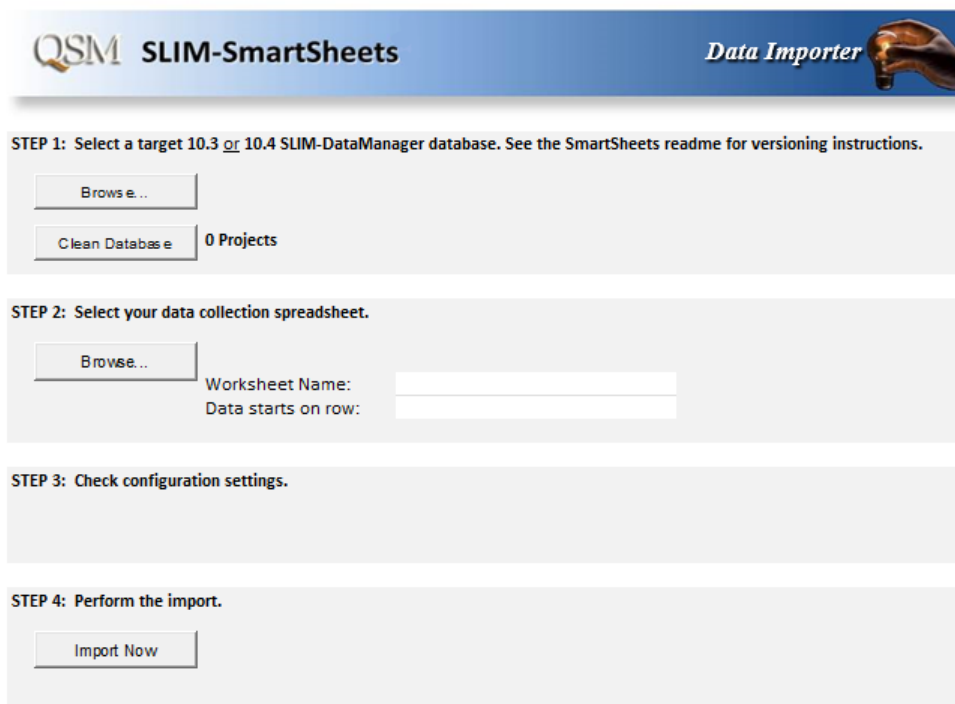
SLIM-DataManager Data Importer SmartSheet

Overview

- SLIM-DataManager, part of the SLIM-Suite of lifecycle management tools, is a database repository of completed software and system development projects. It provides organizations with the ability to capture performance history to perform statistical analysis and provide a basis of estimation for future projects.
- SLIM-DataManager contains high-level data by lifecycle phase - groups of typical development activities, such as requirements & design – along with project level defects, sizing information, and much more including custom metrics. Automating the entry of completed project data requires a mapping of data fields from the source file to their corresponding SLIM-DataManager target fields. **The Simple SLIM-DataManager Importer provides a flexible means of mapping source data fields to SLIM's data fields and automatically updates the target SLIM-DataManager workbook.**

How It Works

This utility uses the SLIM-DataManager 10.3 API to read data elements from the source spreadsheet and populate corresponding fields in a DataManager 10.3 or 10.4 database file using information supplied on the Configuration (data map) tab. Multiple project records can be imported with one execution of the utility. Four simple steps are required to configure and run an import:



The screenshot displays the 'SLIM-SmartSheets Data Importer' application window. The title bar includes the QSM logo and the text 'SLIM-SmartSheets' and 'Data Importer'. The interface is divided into four steps:

- STEP 1: Select a target 10.3 or 10.4 SLIM-DataManager database. See the SmartSheets readme for versioning instructions.**
 - A 'Browse e...' button.
 - A 'Clean Database' button.
 - A status indicator showing '0 Projects'.
- STEP 2: Select your data collection spreadsheet.**
 - A 'Browse...' button.
 - Input fields for 'Worksheet Name:' and 'Data starts on row:'.
- STEP 3: Check configuration settings.**
- STEP 4: Perform the import.**
 - An 'Import Now' button.

STEP 1: Select your target SLIM-DataManager database.

The target SLIM-DataManager workbook must already exist, either as a newly created workbook or an existing workbook containing one or more project records. Since the DataManager 10.3 API works with both DataManager 10.3 and 10.4 workbooks, users with both versions installed may need to update some registry entries to run this utility.

By default, the API will point to the type library (.tlb file) in the Program Files\QSM\Tools 103 or 104 folder, depending on which version was (1) installed last, or (2) last run as an Administrator. If you get an automation error on running the API demo, simply run the desired version of the application executable (SDataManager.exe) as an administrator to update the type library reference. Two buttons are provided to help you select and prepare your output (target) database for the import:

- **Browse...** – launches the Windows File Explorer so you can navigate to your desired target (Output) .smp workbook location and select it.
- **Clean Database** – removes any existing projects from the selected target (.smp) database file. If your selected target database file already contains one or more project, any newly imported projects will be added to the existing ones. No attempt is made to check for duplicate records, but you can use SLIM-DataManager's Find Duplicates utility to perform this task once the import is complete.

STEP 2: Select your data collection spreadsheet.

This utility is designed to import data for QSM's lifecycle phases 1 through 4, sizing, defects, some descriptive information, and up to three custom metrics. The data source file must be a MS Excel spreadsheet with a worksheet containing data in formats compatible with the SLIM-DataManager fields to which they are mapped (text, number, date, etc.).

AutoSave

Exported SW-Metrics Demo data.smp

Search

Kate Armet

FileHomeInsertDrawPage LayoutFormulasDataReviewViewDeveloperHelpInquire

ClipboardFont

Paragraph Styles

Alignment

General

Number

Conditional Formatting

Format as Table

Cell Styles

Insert

Delete

Format

Autosum

Filter

Sort & Filter

Find & Select

Analysis Data

Sensitivity

Share

Comments

Q1

Machine

Project	Project Name	Organization	Division	Preparer	Domain	AppType	App SubType	Industry	Sector	Country	Complexity	Classification	Description	Status	Confidence	Type
1	Northwest Sys	FiberTel	Sys Labs	Software	Telecom	Switches	System Integrators	Unknown	United States	High		Major Enhancement (2)	Handles entire switching system for	Completed	High	Workstat
2	Southeast Sys	FiberTel		Software	Telecom	Unknown	Utilities	Unknown	United States					Completed	High	
3	Ethernet Analysis	FiberTel		Software	Telecom	Unknown	Utilities	Unknown	United States					Completed	High	
4	PRT Sys	FiberTel		Software	Telecom	Unknown	Utilities	Unknown	United States					Completed	High	
5	Pacific Sys	FiberTel		Software	Telecom	Switches	Utilities	Unknown	United States					Completed	High	
6	Mid-Atlantic Sys	FiberTel		Software	Telecom	Unknown	Utilities	Unknown	United States					Completed	High	
7	Midwest Sys	FiberTel		Software	Telecom	Unknown	Utilities	Unknown	United States					Completed	High	
8	Fiber Optic Phase I	Telecom Gen		Software	Telecom	Switches	Utilities	Unknown	United States	Moderate		Major Enhancement (2)		Completed	High	Microcon
9	Fiber Channel Switch	Telecom Gen		Software	Telecom	Switches	Utilities	Unknown	United States	High		New Development		Completed	High	Microcon
10	Fiber Channel Bench	Telecom Gen		Software	Telecom	Switches	Utilities	Unknown	United States					Completed	Moderate	Microcon
11	ISDN Comp	Telecom Gen		Software	Telecom	Unknown	Utilities	Unknown	United States	Moderate		New Development		Completed	Moderate	Microcon
12	Fiber Channel Phase	Telecom Gen		Software	Telecom	Switches	Utilities	Unknown	United States	High		New Development		Completed	Moderate	Microcon
13	Graphics Engine	Binary Systems		Software	Business	Unknown	Military	Unknown	United States					Completed	High	
14	FirePort Control Sys	Binary Systems		Software	Business	Unknown	Military	Unknown	United States					Completed	High	
15	Fiber Channel Phase	Telecom Gen		Software	Telecom	Switches	Utilities	Unknown	United States	High		Major Enhancement (2)		Completed	Moderate	Mainfram
16	Fiber Optic Testing	Telecom Gen		Software	Telecom	Switches	Utilities	Unknown	United States	Low		Minor Enhancement (5)		Completed	Moderate	
17	GGS Resources	High Street Financial		Software	Business	Financial Mgmt	Military	Unknown	United States	Moderate		New Development		Completed	High	
18	Mutual Fund Mgmt	High Street Financial		Software	Business	Financial Mgmt	Military	Unknown	United States	Moderate		Minor Enhancement (5)		Completed	High	
19	Risk Control	High Street Financial		Software	Business	Unknown	Military	Unknown	United States	High		New Development		Completed	Moderate	
20	Online Customer Mgt	High Street Financial		Software	Business	Customer Care	Military	Unknown	United States	Moderate		Minor Enhancement (5)		Completed	Moderate	
21	Benefits Package	Auto/Bar/ary Systems		Software	Business	Human Resources	Financial	Unknown	United States	Moderate		Major Enhancement (2)		Completed	High	
22	Multi-Tiered Channel	Bar/ary Systems		Software	Business	Human Resources	Financial	Unknown	United States	Low		Minor Enhancement (5)		Completed	High	

Provide the utility with the following information regarding your data source (Excel spreadsheet containing the data you wish to import into SLIM-DataManager):

- **Path to source file.** Use the **Browse... button** to launch the Windows File Explorer, navigate to your .xlsx spreadsheet location, and select the file.
- **Worksheet Name:** enter the name of the spreadsheet worksheet (tab) in your source file that contains the data to be imported.
- **Data Starts on row:** enter the number of the row containing the first project record to be imported.

STEP 3: Check configuration settings.

The third worksheet in the importer utility, **Configuration (data map)**, contains a list of the data SLIM- DataManager data elements that can be imported. You may import only those fields that are relevant for a specific project. A list of SLIM-DataManager fields appears in column B. Starting with the first metric in the list (in the screen snap below, **Name** on row 4), use column C (**Column**) to enter the *source worksheet column* where the corresponding data that should be imported for each metric resides. In the example below, **column A** in the source file contains data that will be imported to the Project Name in DataManager. **Columns B and C** contain the **Organization** and **Division** responsible for the project, and so on.

	A	B	C	D	E
1					
2	Data item		Column	Default	
3	Project				
4	Name	A			
5	Description	M			
6	Organization	B			
7	Division	C			
8	Preparer	D			
9	Hours Per Day			24	
10	Days Per Week			7	
11					
12	Accounting				
13	Hours Per MM			165	

Project						
Project Name	Organization	Division	Preparer	Domain	AppType	
Northeast Sys	FiberTel	Sys Labs		Software	Telecom	
Northeast Sys	FiberTel			Software	Telecom	
Ethernet Analysis	FiberTel			Software	Telecom	
PR Sys	FiberTel			Software	Telecom	
Pacific Sys	FiberTel			Software	Telecom	
Mid-Atlantic Sys	FiberTel			Software	Telecom	
Midwest Sys	FiberTel			Software	Telecom	
Fiber Optic Phase II	Telecom Gen			Software	Telecom	
Fiber Channel Switch	Telecom Gen			Software	Telecom	
Fiber Channel Benchr	Telecom Gen			Software	Telecom	
IBM Corp	Telecom Gen			Software	Telecom	

Use Column D to specify a Default value for all imported projects, such as 165 for Hours Per MM.

An unlimited number of custom metrics can be imported. The metrics must be defined in the SLIM-DataManager workbook prior to import. Metric names are case sensitive.

STEP 4: Perform the import.

Once the Configuration (data map) spreadsheet has been updated, click the **Import Now button** to perform the import. Launch SLIM- DataManager, open the target/output workbook and verify that all project records and desired data elements have been imported.

Note: the importer does not attempt to update pre-existing 'matching' projects in the target database, so you may unintentionally import duplicate records when working with existing databases. If this happens, use the SLIM-DataManager Find Duplicates feature to identify and resolve duplicate records.