

**Borland®**

**Atlas 2.4**

**Atlas Help**

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**2015-12-01**

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# Atlas 2.4 Help

Welcome to Atlas - The collaborative, flexible, agile requirements and delivery platform.



**What's New** - Check out the new features we have for you in 2.4:



[Hide Disabled UDAs from UDA List](#)  
[Disabled UDAs No Longer Appear in Various Requirement Views](#)  
[Multi-line Text UDAs](#)  
[Multi-Select List UDAs](#)  
[Open Requirements and Stories from the Tracking Chart](#)  
[Tracking Details Available in Activity Feed](#)  
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[Easy Access to Table of Contents, Search, and Index in Help](#)  
[Video Training Series Available on YouTube](#)  
[Relationship Diagram](#)  
[Define Project Specific Filters](#)  
[View and Access Plans from Requirement Grid](#)  
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[File Name Changes Visible in Compare](#)  
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[Attach Files to Requirements](#)  
[Historical View of Activity Feed](#)



**Getting Started** - Find out how to hit the ground running:

[Getting Started](#)  
[Help](#)  
[Web-Based Training](#)

[Atlas videos](#)



**Watch and Learn** - We've got videos!

[Youtube channel](#)  
[Overview](#)  
[About](#)  
[Whiteboards](#)

[Creating Projects](#)  
[Home Perspective](#)  
[Creating and Managing Whiteboards](#)  
[Gather Perspective](#)



**Featured** - We think you'll like these sections:

[Atlas Home](#)  
[Gather and Share](#)  
[Ideas](#)

[Define and Scope Your Requirements](#)  
[Plan Your Requirements](#)  
[Track Progress](#)



**Resources** - Let us know if you need more info:

 [Web Based Training](#)  
[Product Updates](#)

[Atlas on the Community SupportLine](#)  
[Email us some feedback!](#)

## About Atlas

Atlas is a collaborative, flexible, agile requirements and delivery platform. This web-based requirements tool enables business analysts, product managers, and other project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (pictures, presentations, documents, videos).
- Organize and structure those ideas into well formed requirements.
- Prioritize and plan those requirements into a specific time-frame given their agile teams velocity.
- Track the progress of their agile teams work towards their requirements, independently of their agile tool of choice.

In addition to the Online Help, Installation Guide, and Release Notes, for more information about Borland Atlas, refer to [Borland.com](#) and the [Borland Community](#).

## What's New in Atlas

### 2.4

#### Hide Disabled UDAs from UDA List

With a click of a checkbox, you can now hide disabled UDAs from the UDA list in the Administrator Tool, making it easy to find the relevant UDAs for your Project.

#### Disabled UDAs No Longer Appear in Various Requirement Views

When disabling an UDA in the Administrator Tools, the UDA no longer appears in such areas as the Requirement Grid and the Attributes tab.

#### Multi-line Text UDAs

You can create multi-line text fields for a UDA. All attributes over 50 characters long will render a multi-line text box.

#### Multi-Select List UDAs

Administrators now have the ability to create lists with multiple selections. Choose **List - Multi Select** data type in the Administrator Tool to create the new list.

#### Open Requirements and Stories from the Tracking Chart

You may want to view the details of a requirement or a story while viewing the Tracking chart. Click the icon next to the requirement or story and the item will open in a new browser tab.

## Tracking Details Available in Activity Feed

When you first log in, you can quickly view tracking details on the latest changes right in your Activity feed. Plan names are displayed with the Requirement or story, as is status details, and pie chart.

## Warning for Items Needing Action

Check the **Warning** checkbox in the Activity feed to find items that require action, such as items with no relationships.

## Navigation within Help

Access the Atlas Online Help from anywhere in Atlas with the Information icon. Choose Atlas Context Help to open help relevant to the perspective you are currently using or access the Atlas Online Help to view all topics. The Atlas Online Help contains a table of contents, index, and search, making navigating to any topic convenient and easy.

## Video Training Series Available on YouTube

View the Atlas video training series on [YouTube](#).

## Relationship Diagram

The new Relationship Diagram provides a graphical representation of the relationship between items, allowing you to visualize the relationships for a requirement. It displays not only the top-level relationships, but also allows you to click and follow relationships further down the hierarchy.

## Define Project Specific Filters

As you interact with many Projects, you want to define filters that are Project specific. This release provides the ability to define filter specific to each Project, making you results list manageable and succinct.

## View and Access Plans from Requirements Grid

The new Plan column in the Requirements Grid allows you to see if a Requirement has been added to a Plan(s). Selecting the plan from the Requirements Grid or the **Plans for Requirement** dialog, opens the plan in view mode. Additionally, you can add the Requirement to a Plan or remove the Requirement from a plan all within the **Plans for Requirement** dialog.

## Quickly Save a Snapshot of a Moment in Time Machine

The new Save feature in Time Machine allows you to quickly save the moment you are viewing.

## File Name Changes Visible in Compare

When comparing versions, file changes are available in the Files field of the attributes. The comparison tracks when files are added, removed, or names have changed.

## Requirements Recycle Bin

Retrieve recently deleted requirements from the Recycle Bin. The Recycle Bin displays the last 50 deleted requirements. To ease your search, use **Find Requirements** or select a month and year to display only the Requirements meeting your criteria. Click the Retrieve icon to replace the requirement within the tree.

## Attach Files to Requirements

You can attach any file type to your Requirement. While in the Define perspective, open your Requirement, click the Attachment tab, and browse to your file.

## Historical View of Activity Feed

Choose a date to view the Activity Feed at any point in the past for that Project, allowing you to quickly view past changes.

## 2.2 and 2.3

### Copy and Paste Requirements across Projects

You may have requirements in one project that you'd like to reuse in another. However, you don't want to reuse all requirements so an import and export would require too much pruning work to be efficient. Atlas allows you to copy your selected requirements across projects with a simple copy and paste. Requirement and Project IDs are copied, but Relationships and child Requirements do not copy and paste with the selected Requirements.

### Display Search Results from Specific Projects

You can now display search results from all projects, current project, or specific projects. This provides manageable sized search results and allows you to search in projects of interest to you.

### Turn Requirement IDs on or off in Tree

With a simple click of a button, you can view Requirement IDs in the Tree View.

### Hyperlink Back to Atlas in Exported CSV File

Atlas provides a link to each original requirement in the last column of the exported CSV file. Copy and paste the link into a browser to navigate back to the requirement in Atlas.

### Time Machine Difference Overview

The Time Machine in the Tracking perspective uses Atlas's version capability to allow you to view historical delivery data. The Difference Overview panel helps you quickly understand the true changes that have occurred over time across the integrated tools.

### Version Compare in Activity Feed

You can now view version comparisons of Requirements and Stories on the Activity feed.

### Detailed Differences in Compare

For easy identification of changes, Compare provides detailed differences highlighting description changes in color when comparing versions of Requirements and Stories.

### Combined Whiteboards and Concepts in Relationships

When adding Relationships, Whiteboards and Concepts are combined on one tab. You can now see to which Whiteboard the concepts belong instead of seeing a long list of concepts.

### Show Associated Plan in Requirement Deliver Status

While in a Requirement, you can quickly view the associated Plan. If there isn't an associated Plan, you can click the field and select a Plan right within the Requirement. Additionally, you can click the Plan in the Delivery Status of the Requirement and you can open it. If the requirement is in multiple plans, the Deliver Status states "Multiple." Click **Multiple** to show a menu that allows you to choose the plan to open.

# Atlas Planning and Tracking Suite

Atlas, Borland Hub, Borland Connect and StarTeam Agile are now installed together as part of the new **Atlas Planning and Tracking Suite**.

## 2.1

### Web-Based Training

Use the following link to order the new, free Atlas web-based training. Order it [here!](#)

### Compare

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

You can compare versions of Requirements and Stories.

### Preserve Microsoft Word Format When Importing

When importing Microsoft Word documents as requirements, Atlas preserves tables, bulleted and ordered lists, font colors, and formatting.

### Requirement Authoring Improvements

With this release, there are several usability improvement with Requirement authoring, including: (1) Improved image resizing, (2) Drag and drop images within the Requirement Editor, (3) Paste images directly in Google Chrome, (4) Indicate spelling errors for misspelled words, and (5) Press Ctrl+Click on the misspelled word to enable the built in browser context menu with spelling suggestions.

### Report Generation

A Microsoft Word-based report generation capability that allows for the creation of detailed requirement, plan and tracking reports. Report scope can be narrowed down using either filters or generated for full projects. Each report can optionally include Attributes, Relationships, Tags, Discussions and Delivery Tracking data.

### Cross Project Relationships

Relationship management has been extended to provide the ability to create relationships across projects. This enables users to accurately represent the complex dependencies that exist in large projects.

### Time Machine Difference Identification

The **Time Machine** allows users to view delivery status at an historic plan date/time. The newly added **Difference** view enables users to understand date and scope changes quickly and in detail.

## Getting Started

Atlas is a web-based, lightweight Requirements tool focused in enabling business analysts, product managers and other Project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (pictures, presentations, documents, videos).
- Organize and structure those ideas into well-formed Requirement.
- Prioritize and plan those Requirements into a specific time-frame given their Agile team's velocity.

- Track the progress of their Agile teams work towards their Requirements, independently of their Agile tool of choice.
- Easily search for specific items.

Atlas consists of five perspectives. The icons to access the perspectives are located across the top of the page:

- Home - 
- Gather - 
- Define - 
- Plan - 
- Track - 

## Agile Requirements Management

### Requirements Management

Requirements management involves establishing and maintaining agreement between customer and developer on both technical and non-technical requirements. This agreement forms the basis for estimating, planning, performing, and tracking project activities throughout the project and for maintaining and enhancing developed software. Studies have shown that 30-35% of software development effort is spent on rework, over 50% of software defects are attributed to requirement errors and over 80% of rework effort is spent on requirements related defects. Getting requirements management right pays huge dividends in delivering software solutions to your customers in a time frame that satisfies them.

### Agile Requirements

Requirements follow an iterative planning cycle. From conceptualization, to review, and through edits, requirements evolve into a plan for development. It is from this point, when the requirement is handed over to the development team, that the requirement becomes Agile.

What is Agile development? It is an interactive method used to determine requirements for development projects. It is highly flexible and interactive, allowing the project scope to change rapidly and frequently. There are many tools on the market that enable and enhance the Agile development cycle.

Atlas, with its Requirement management, Whiteboards, and Plan development, is a perfect tool to use in an Agile environment. Integrating with Agile tools enables project managers to link Requirements to Stories and view progress for each iteration. Atlas provides the ability for project managers to recognize scope creep and react quickly. Also, they can determine from the **Status** tab or **Track** perspective, whether a change to a Requirement will negatively impact the delivery dates.

Additionally, open communication between team members and project stakeholders is essential to the success of an Agile team. Atlas's Discussion functionality provides this critical ability to all members of the team, allowing rapid changes to the project as it evolves.

## How Projects Are Organized

Before you start using Atlas, you'll need to understand the organizational structure. Atlas uses *Projects*, *Requirement Types*, and *Requirements* to organize and convey information. These levels are nested within each other, with *Projects* being the topmost container.

### Projects

Atlas stores Requirements in Projects. Projects stored in the same server share a common set of properties (Requirement Types, Attributes, security profiles, users, and groups).

<b>Requirement Types</b>	<p>Atlas organizes Requirements by type. A Requirement Type defines a logical grouping of Requirement that share common Attributes.</p> <p>Atlas makes it easy to reuse Requirement Types among Projects. Once created, a Requirement Type can be assigned to any Project, minimizing the time it takes to create Projects.</p>
<b>Requirements</b>	<p>Requirements are the primary artifact in Atlas.</p> <p>The primary means to view Requirements include the <b>Requirement Tree</b> and the <b>Requirement Grid</b>. You can toggle between the two by clicking the corresponding icon in the <b>Define</b> perspective.</p>

## Using Atlas

Your Atlas administrator has installed and configured Atlas and has provided you with a URL for access.

Atlas is organized to follow a natural flow of Requirement creation to user Story breakdown. As you work through the perspectives, you are following the flow from the Requirement creation to tracking progress in your Agile tool. However, you can skip around within the perspectives and work in your own flow.

Use these steps for a basic overview of tasks to complete your planning from start to finish. Navigate through the perspective sections of the help to view additional and advanced tasks.

The suggested flow is:

1. Navigate to Atlas in your browser and log in. Atlas opens.
2. Capture high-level business needs and break them down.
  - a) Create a Project.
  - b) Define Requirement Types.
  - c) Set up User Defined Attributes.
  - d) Optional: upload ideas to a White boards.
  - e) Create Requirements for the Project. You can create Requirements or convert Concepts into Requirements. You can also setup relationships between Whiteboards and Requirements or Requirements to Requirements.
3. Rank Backlog of Requirements.
  - a) Change item rank in list.
  - b) Open Requirement in hierarchical context from the Grid view (flat list).
  - c) View Requirement subsets in Grid.
  - d) Order Requirements based on rank within the Grid.
4. Create a Plan and add Requirements to the Plan.
  - a) View list of Plans.
  - b) Open a Plan.
  - c) Review items to include in Plan.
  - d) Use Plan contents and team capacity to project Plan end date.
  - e) Define a Requirement Plan with start and end dates.
  - f) Review hierarchical list of item to include in Plan.
5. Add Requirement detail to top of Backlog.
  - a) Understand summary delivery status from an individual Requirement.
  - b) Find and existing Requirement using search.
  - c) View status of related stories from within a Requirement.
6. Send Requirement to Agile Backlog.
  - a) Optional: Add additional Requirement to a previously pushed plan.
  - b) Optional: Re-send an updated Requirement.

- c) Optional: Re-send an updated Plan.
- 7. Track Requirement and Story progress.
  - a) View Plans with high level status.
  - b) View Plan delivery status and analyze progress and projection.
  - c) View delivery Plan from previous date.

## Administration

Atlas has two levels of system administration: Server administration and Project administration. The **Administrator Tools** contains tabs allowing both administrators to manage Atlas data.

The tab group on the left is specific to Project administrators. Project administrators can only manage items in these tabs. These include Project default values, Requirement Types, and project access.

The tab group on the right is specific to Server administrators. Only Server administrators can access these tabs. Additionally, Server administrators have Project administrator rights. Server administrators manage specific settings including defining Requirement Types, User Defined Attributes, users, and also configuring Borland Connect.

Administrators click the **Admin Tools** button on **Home** to open the **Administrator Tools** window.

## Setting Default Save Location for Stories



**Note:** This procedure can only be performed by Project administrators.

Project administrators can use the following procedure to determine where Stories are saved by default.



**Important:** This is a per-Project option and must be set for each new Project.

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Defaults** tab.
6. Click **Agile Integration**.
7. Select one:

**Root of Backlog** When Requirements are pushed from the **Define** or **Plan** perspectives, they appear at the top level of the Agile Backlog.

**Under existing Story** When Requirements are pushed from the **Define** or **Plan** perspectives, they appear nested under the selected Story. After selecting this option, choose the parent Story.

8. Click **Save**.

## Setting Default Requirement Values



**Note:** This procedure can only be performed by Project administrators.

Project administrators can set default values for **Rank**, **Estimate**, **Status**, and **Priority**.

1. Log in with Project administrator credentials.
2. Click  (**Home**).

3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Defaults** tab.
6. Click **Workflow**. The default options appear.
7. For **Rank**, enter an integer value
8. For **Estimate**, enter an integer value.
9. For **Status**, put a check next to the **Possible Values** that you want to use. Click **Add Value** to add a new value to the top of the list. Double click an existing value to change it.
10. For **Priority**, put a check next to the **Possible Values** that you want to use. Click **Add Value** to add a new value to the top of the list. Double click an existing value to change it.
11. Click **Save**.

After the defaults are set, the default values appear in the appropriate fields when you create a Requirement. You can override the defaults by editing the appropriate fields in the Requirement.

## Setting Default Requirement Types for a Project



**Note:** This procedure can only be performed by Project administrators.

The Project administrator can set the available Requirement Types for the Project using the steps below.

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click **Project Req Types**.
6. The available Requirement Types appear in the list on the right. The **Associated Requirement Types** for the Project are on the left. Hover over a Requirement Type in the **Available Requirement Types** list and click the **+** to add it to the **Associated Requirement Types** list.

## Setting Project Access Rights



**Note:** This procedure can only be performed by Project administrators.

Project administrators can add/remove users from Projects based on role. Atlas provides the following roles:

- |                      |   |
|----------------------|---|
| <b>Viewer</b>        | A <i>Viewer</i> can see the Project in the list of Projects, can add it as a favourite, and view all of its assets. <i>Viewers</i> can't edit or delete assets. <i>Viewers</i> can perform operations such as generating reports, but generally they can't change the data or the configuration of the Project. |
| <b>Contributor</b>   | A <i>Contributor</i> can do everything a <i>Viewer</i> can do plus they can edit the Project data. That means they can modify and delete Requirements, Concepts, etc. They cannot modify the configuration of the Project (no access to <b>Admin Tools</b> ).   |
| <b>Administrator</b> | A project <i>Administrator</i> can do everything a <i>Contributor</i> can, plus they can modify Project configuration via the <b>Admin Tools</b> .  |



**Note:** A *Project administrator* is not the same thing as a *Server administrator*. In order to be a *Server administrator*, another *Server administrator* needs to apply *Server Administrator* permissions to that user in the **Privileges** group of the **Users** tab. See [Managing Users](#).

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click **Project Access Rights**.
6. Click either the **Viewers**, **Contributors**, or **Administrators** buttons. The list of users with that role in the Project is displayed.
7. To add a user with that role, hover over a user in the **Available Users** list and then click **+**. The user is added to the Project in the role that you selected.



**Tip:** Click **Make Public** (next to the roles) to remove all users from roles in the Project. Doing this will give each user access to the Project as a *Contributor*. However, only users with *Server administrator* credentials can manage the Project.

## Defining Requirement Types



**Note:** This procedure can only be performed by Server administrators.

Atlas organizes requirements by type. A Requirement Type defines a logical grouping of requirements that will share common User Defined Attributes.

The key properties of a Requirement Type are:

- A name (displayed in the Requirement tree).
- A set of User Defined Attributes on the user interface.

Atlas makes it easy to reuse requirement types among Projects. Once created, a Requirement Type can be assigned to any Project, minimizing the time it takes to create Projects.

Server administrators can follow the steps below to create and modify Requirement Types.

After creating them, associate User Defined Attribute Groups with the Requirement Type.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Define Req Types** tab.
6. If you want to create a new Requirement Type, click **New Requirement Type** and then add a name.
7. Select a Requirement Type in the **Define and Configure Requirement Types** list. The Requirement Type is opened on the right in the **Configure** section.
8. Add/remove User Defined Attribute groups using the **Available User Defined Attribute Groups** list.

## Defining User Defined Attributes



**Note:** This procedure can only be performed by Server administrators.

A User Defined Attribute allows you to create a custom field for your Requirement Type. Normally, an administrator creates and assigns User Defined Attributes while creating a Requirement Type or a Project.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.

4. Click **Admin Tools**.
5. Click the **Define UDAs** tab.
6. Check **Hide Disabled UDAs** to reduce list size and make it easier to see if a UDA is already created.
7. Click **New User Defined Attribute**.
8. Enter a **Name**.
9. Enter a **Display Name**.
10. Select a **Type**: Text, Number, List, or List - multi Select.
11. To ensure that users enter a value, click **Required** in the **Conditions** group.
12. For the Text data type, enter a **Max length** value.  
Text attributes that are over 50 characters long will render as multi-line text. Whereas, those that are up to 50, will render as a single-line text.
13. For the Number data type, if you want the values to roll up through the Requirement, select **Rollup Values** in the **Conditions** group.
14. For the Number data type, enter a **Default value**.
15. For the List data type, use the **Values** group to add values to the list. Enter a **Default Value** for each.
16. For the List - Multi Select data type, use the **Values** group to add values to a selection list.  
Enter a **Default Value**.
17. Click **Save**.

## Hiding User Defined Attributes

To remove a User Defined Attribute from the Attributes tab on Requirements and from the Requirement Grid column:

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Define UDAs** tab.
6. Select the UDA to disable.
7. Uncheck **Enable**. The UDA is hidden from all UDA areas of Atlas.

## Organizing User Defined Attributes



**Note:** This procedure can only be performed by Server administrators.

You can use groups to organize how User Defined Attributes are displayed on the **Attribute** tab.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Organize UDAs** tab.
6. Click **New Group** to create a new group or select an existing group from the list.
7. Click the **+** next to the User Defined Attribute to add to the group from the **Available User Defined Attributes** list.

# Managing Users

 **Note:** This procedure can only be performed by Server administrators.

1. Log in with Server administrator credentials.
2. Click  (Home).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click **Users**.
6. Click **New User** to add a user or select a user from the **Available Users** list and click .
7. Enter the user **Details**:
  - a) Enter a **Logon Name**. This is the name the user will use to login to the application.

 **Note:** This value is also used in Discussions as @LogonName.
  - b) Enter the user's **Password**.
  - c) Enter a **Name**. This is used as the user's display name.
  - d) Enter the user's **Email Address**.

 **Important:** In order to participate in Discussions, you must enter a valid email address. See [Sharing Requirements and Collecting Feedback](#).
  - e) Enter a **Phone Number**.
8. Enter the user **Privileges**:
  - a) Check the **Server Administrator** check box to make the user a *Server Administrator*.
9. Enter the user **Login Status**:
  - a) Check **Suspended** to lock the user out.

# Accessing Borland Connect

 **Note:** This procedure can only be performed by Server administrators.

If you need to change configuration or add Agile tools, you can access Borland Connect through Atlas. You can also access the community for more documentation and information about Borland Connect.

1. Log in with Server administrator credentials.
2. Click  (Home).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Connect** tab. The **Connect** tab opens.
6. Click **Open**. Borland Connect opens.

# Getting Started with Borland Connect

This topic describes how to start the Borland Connect UI, and it provides an overview of the Borland Connect dashboard and how it is used to configure data sources and connections, and how to run and manage synchronizations.

 **Note:** There are some features available in Borland Connect that you can set only in the `Connect.xml` file. A sample of this file, named `Connect.xml.sample`, located in the installation directory, contains comments on how to implement these features.

## Starting the Borland Connect UI

Before starting the Borland Connect UI, the Borland Connect server must be running. See *Running the Borland Connect Server* for more information.

1. Go to `http://<machine name>:8080/ConnectWeb/index.html`. The Borland Connect login page, **Borland Connect**, appears.
2. In the **Username** and **Password** fields, enter your Borland Hub user name and password, and then click **Login**. The Borland Connect UI appears.

Once you have logged in, take a moment to familiarize yourself with the Borland Connect dashboard, as described in *The Borland Connect Dashboard*.

## Logging Out

Click the **Log out** button (.

 **Note:** Logging out has no effect on the Borland Connect server.

## The Borland Connect Dashboard

The main page of the Borland Connect UI is referred to as the *dashboard*. The dashboard consists of three main pages; each is associated with its own tab:

- The **Connections** page displays a list of your installed connections and a summary of their synchronization attributes -- the connection's data source, the direction in which assets are synchronized (the default is bi-directional), the last time a synchronization was run, the last time a synchronization succeeded, and the current status (which can refer to either the synchronization task itself, or to the configuration that defines it; more on this later).

The **Connection Details** panel shows detailed information about the currently selected connection, including information about how projects, types, fields, and relationships are mapped between your third-party system and the Borland Hub.

-  **Tip:** Borland Connect installs connections for several third-party systems, some of which you might not use in your organization, by default. Consider using the Delete action to remove unused connections.
- The **Data Sources** page displays a list of currently defined data sources. A **Data Source Details** panel shows detailed information for the currently selected data source; the information displayed on this panel varies based on the data source. You can also use this page to create and edit data sources.
- The **Borland Hub Settings** page lets you connect to the Borland Hub associated with your Borland Connect installation. Once connected, you use this page to identify the types of assets you plan to synchronize with your third-party system.

## The Dashboard Toolbar

The Borland Connect dashboard toolbar contains icons that:

-  - Log you out of the Borland Connect UI. (Logging out has no effect on the Borland Connect server.)
-  - Display the **Settings** dialog box, from which you can configure general system settings such as resources and error notification.
-  - Get help for Borland Connect, either by displaying the *Using Borland Connect* guide, or accessing the Borland Connect community ( [http://community.microfocus.com/borland/managetrack/borland\\_connect/](http://community.microfocus.com/borland/managetrack/borland_connect/)).

## What to Do Next

Once you are familiar with the Borland Connect UI, consider doing one or more of the following:

- Configure general system settings, as described in [Setting Synchronization Resources](#) and [Email Settings](#).
- Remove any unused connections from the dashboard by selecting them and choosing the **Delete** action.
- If you are using one of the connections installed by default, start by configuring its data source. See [Creating a Data Source](#) for more information.
- If you are using a connector from the Borland Connect community, install and configure it as described in [Installing a Connector](#).

## Starting and Stopping Connections

A connection needs to be fully defined before you can start it.



**Tip:** Borland Connect attempts to run a connection once it is defined. You can see a connection's status on the Borland Connect dashboard.

- To start a connection, click its **Start** button (▶) on the dashboard. The button changes to the **Stop** button (◻) and the status is updated.
- To stop a connection, click its **Stop** button (◻) on the dashboard. The button changes to the **Start** button (▶) and the status is updated.

## Connection Status Values

The **Connections** page contains a grid listing each of your connections. One of the columns in the grid is **Status**. The following are the available **Status** values:

<b>Disabled</b>	The user-configurable value of <code>Enabled</code> in <code>Connect.xml</code> is <code>false</code> .
<b>Failed</b>	One or more sync-sets associated with this synchronization have failed and no subsequent iterations have succeeded. See the <code>Running</code> status for an example.
<b>Idle</b>	There are no projects to synchronize or the <code>projectMaps</code> are disabled.
<b>Restarting</b>	The application is re-reading the configuration file ( <code>Connect.xml</code> ) and is restarting all of the synchronizations. When the sync is complete, the status will change to <code>Running</code> or <code>Failed</code> .
<b>Running</b>	<p>The status will be <code>Running</code> when the last available status for all sync-sets is <code>Success</code>.</p> <p>For example: A synchronization has three sync-sets (<code>ss1</code>, <code>ss2</code>, <code>ss3</code>):</p> <pre> Case 1 RUNNING:   Iteration 2: ss1=success, ss2=success, ss3=success   Iteration 3: ss1=ongoing  Case 2 FAILED   Iteration 2: ss1=failed, ss2=success, ss3=success   Iteration 3: ss1=ongoing  Case 3 RUNNING:   Iteration 2: ss1=failed, ss2=success, ss3=success   Iteration 3: ss1=success, ss2=ongoing </pre>
<b>Server Reinitializing</b>	The application is reinitializing after changes to the configuration file. This status will display for all connections until the application has re-read the configuration file and created the associated sync-sets.
<b>Unknown</b>	The synchronization status is not known to the application. There is an error.

## Setting Synchronization Resources

Use this procedure to specify values that Borland Connect uses when synchronizing assets of your third-party system with those in the Borland Hub.

1. Click  (**Settings**). The **Settings** screen appears.
2. Click the **Synchronization** tab if it is not already active.
3. Complete the following fields for your environment:

Field	Description
<b>Maximum Number of Threads</b>	Specifies the number of threads over which you want to spread synchronizations when using multiple data sources or projects. The default is 4.
<b>Synchronization Frequency</b>	Specifies the time, in seconds, between synchronizations. The default is 20.

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

## Setting Up Error Notification

Borland Connect can generate email messages when system and synchronization errors occur. You specify default values for settings that are used by both types of errors on the **Error Notification** tab of the **Settings** dialog box: your SMTP server settings, who you want to receive error notification email, and how often. If you want, you can override email settings on an individual connection basis as described in [Creating a Connection](#).

1. Click  (**Settings**). The **Settings** screen appears.
2. Complete the **SMTP Settings** and **Email Settings** fields as described below.
3. When you are done, click **Save** to save your changes.

<b>SMTP Settings</b>	Use these fields to specify information needed to identify and connect to your SMTP server.
<b>Host</b>	The email system's host name.
<b>Port</b>	The email system's port number.
<b>Login Name</b>	The email user.
<b>Password</b>	The password for the email user.
<b>From</b>	The email address from which notification emails will be sent.
<b>Email Settings</b>	Use these fields to specify email recipients and how often you want Borland Connect to send error notification email.
<b>Send Email To</b>	Email addresses for the users you want to receive error notification email. Separate addresses with a semicolon (;).
<b>Frequency</b>	The frequency with which you want Borland Connect to send error notification email. The default is 60 minutes.

## Installing a Connector

You might need to install a connector if one for your third-party system wasn't installed with Borland Connect. To install a connector:

1. Go to our community site <http://community.microfocus.com/borland/> and download the connector you need to the Borland Connect folder.
2. Open the `Readme.html` file for the connector you downloaded and follow all steps to configure it. (Each connector has its own configuration procedures.)

3. Start Borland Connect to load your connector.
4. Navigate to the logs directory (c:\Users\davidf\AppData\Local\Borland\Borland Connect\logs\, for example) and open the most recent BC-Log\*.log. You will see a line that displays success or failure for loading your connector:

```
14 Mon Mar 16 11:01:09 PDT 2015: Discovered com.git.connect.GitDataPool
```

or

```
14 Mon Mar 16 11:01:09 PDT 2015: Warning: Failed to load a connector.
```

If the log contains a warning, the connector did not load properly. Refer to the connector's `Readme.html` and verify that all of the connector's required .JAR libraries have been installed.

### Merging Connect.xml Content

The `Connect.xml` file that is used by Borland Connect is stored in the Borland Hub within the StarFlow Extensions project located in the following folder: `StarFlow Extensions/Connect`. There are several scenarios where you may want to combine content from other `Connect.xml` files into this file. For example, you may have different `Connect.xml` files from a Borland Connect version upgrade or from a new connector that you downloaded from the community. To combine these files:

1. Using the Borland StarTeam Cross-Platform Client, check out `Connect.xml` from the StarFlow Extensions project located in the `StarFlow Extensions/Connect` folder of your Borland Hub.
2. Open it for editing.
3. Open your new connector's `Connect.xml` or `Connect.xml.sample` - these files should be available in the root directory of your connector folder.
4. Copy the full `<DataSource>` element that you want from your new connector file and paste it into the appropriate location in the `Connect.xml` from the Borland Hub.
5. Copy the full `<Synchronization>` element that uses the `<DataSource>` element in the previous step and paste it into the appropriate location in the `Connect.xml` from the Borland Hub.
6. Save the `Connect.xml` file and check it back into the Borland Hub.

### Example: Integrating an SCM Connector

The most common use case for an SCM connector is to manage your Release and Integration branches in Borland Hub while the development teams use a different SCM tool for their sandbox branches. This model allows each development team to work with their sandbox tooling of choice while still maintaining an enterprise-class single source for release and change management in Borland Hub. To set up the SCM Connector:

1. Choose the appropriate SCM connector and follow its `Readme` file to set it up. Some connectors are installed to your Borland Connect installation directory, and others are available from the Borland community (<http://community.microfocus.com/borland/>).
2. In the StarTeam Cross-Platform Client, navigate to the Release or Integration view and use the **Copy URL to Clipboard** option on the folder that you want to synchronize. Place the URL in the `<sourceRootPath>` of the `Connect.xml` project map, corresponding to the correct `Source Project` name.
3. Perform a complete file checkout from the Borland Hub Release view. These will be the files used to establish the initial branch in the other SCM tool.
4. Open the other SCM tool and create a new branch (Integration branch) adding the complete hierarchy of folders and files checked out from the Borland Hub Release view.
5. Copy the URL (or unique identifier) to the root folder of the newly created Integration branch in the other SCM tool. Place this URL in the `<targetRootPath>` of the `Connect.xml` project map, corresponding to the correct target project name.

6. Start Borland Connect with the SCM settings completed.
7. Create child branches from the Integration branch in the other SCM tool for the development team to work in. These can be shared branches, individual branches, feature branches or defect branches. The team is free to work in these branches in any way that matches your best practices. When code changes are completed in the sandbox and merged back into the Integration branch in the other SCM tool, Borland Connect will automatically synchronize the changes into the `Release` view of Borland Hub to be tracked and managed along with other contributing team changes. If any changes are made in the `Release` view directly in the Borland Hub UI or by other contributing teams, then Borland Connect will synchronize those changes back into the Integration view to be merged into the team sand boxes.

## Creating a Data Source

This topic describes how to use the Borland Connect UI to:

- Create a data source.
- Enter the data source connection details.
- Test the connection to the data source.
- Add types from the data source that you want to use.



**Tip:** You need a data source in order to fully define a connection.

1. On the Borland Connect dashboard, click the **Data Sources** tab.
2. Above the **Data Sources** list, click **Create New Data Source**.
3. On the dialog box that opens, complete the **Name** and **Product** fields:

<b>New Data Source Name</b>	Enter a unique name for your data source.
<b>Data Source Product</b>	The products that are available in the list are the connectors that were added with the product installation or the ones that you downloaded from the Borland community and installed yourself.

4. Click **Add Data Source**. Your data source is added to the list of data sources. Select it to edit it. The data source pane is refreshed with additional fields that are specific to that product. Refer to the `Readme.html` file that was installed with your connector for more information on these fields.



**Tip:** If you are editing a data source for a connector that was installed with Borland Connect, the **Type** table is populated with the default asset types specified in the `Connect.xml` associated with that data source. The values in this table remain disabled until you connect to the data source.

5. Modify the **TimeOffset** property, if necessary.

The `TimeOffset` property is a Borland Hub property. When the offset isn't set in the XML, after the first update that occurs to the datapool, the measured offset is calculated, in terms of seconds. This is displayed in the log if `debug` is `HIGH`, or `debug` is `SYNC_RUN_DETAILS`. If the Borland Hub and other server are *in sync* this value should be less than 3 seconds.

- If the `TimeOffset` is specified in the configuration file then it is used to determine the DataPool's current time in relation to the time where Borland Hub is running.
- `TimeOffset` is the value that is added to *pool time* in order to get local Time. If the *pool Time* is 6:30 PM, and the local time is 2:30 PM, offset is -4 hours or -14400.
- If the `TimeOffset` is not specified, then it is dynamically calculated/adjusted every 5 minutes by getting the modified time after an update of an item. The first calculation sets the `offset`, subsequent calculations adjust it by moving it 1/3 toward the newly calculated offset.

6. Click the **Connect** button. Borland Hub connects to the data source you have specified.
7. Click the **Add New Type** button (you might have to scroll to make the button visible), and then use the drop-down button in the new field to choose the types from your data source that you want to make available to the Borland Hub.



**Important:** You must add types to your data sources before you can add them to a connection.

- When you are done adding types, click the **Save** button to save the data source. The new data source appears in the **Available Data Sources** panel and can now be added to a connection as described in [Creating a Connection](#).

## Creating a Connection

In Borland Connect, a *connection* represents the relationship between two data sources, typically between the Borland Hub and the data source you have defined for your third-party system. You use the connection:

- To identify the data source whose assets you plan to synchronize with the Borland Hub.
- To specify the asset types, fields, and relationships you want to synchronize.
- To specify the projects you want Borland Connect to synchronize.

You perform these tasks using the **Create Connection Wizard**, as defined in the following procedure, or later, by editing an existing connection.



**Note:** The data source you want to use for a connection must exist before you can complete a connection. See [Creating a Data Source](#) for more information.

- From the **Connections** tab on the dashboard, click the **Add Connection** button. The **Create Connection Wizard** appears.
- On the **Data Source** tab, enter a name in the **Connection Name** field.
- Optionally, use the fields in the **Error Notification** group box to override error notification email settings specified in **Settings**:
  - Enter email addresses (separated by a semicolon (;)) in the **Send Email To** field.
  - Change the value in the **Frequency** field.



**Tip:** Email addresses and frequency values established on the **Settings** page are not displayed here.

- Select the data source you want to use with this connection from the **Available Data Sources** panel and review its information in the **Selected Data Source Details** pane.



**Note:** If the data source you need is not displayed in the **Available Data Sources** panel you will have to create it. See [Creating a Data Source](#) for more information.

- Click the **Next** button if you want to define types and fields you want to synchronize now. The **Types and Fields** tab appears. See [Adding Types to Connections](#) for more information. Otherwise, click the **Save** button to save the connection.



**Note:** If you save the connection at this point, note that it is incomplete.

## Adding Types to a Connection

A *type* is a system asset such as a task, topic, change request, or story. When creating a connection, you must add at least one type to synchronize between your data source and the Borland Hub. For example, you may want to map a Rally *Hierarchical Requirement* to a Borland Hub *Story*.



**Important:** The types that are available to add to a connection are bound by the types that you added to your data source. If the type that you want is not listed, return to the **Data Sources** tab and add the type to the data source. See [Creating a Data Source](#) for more information.

- If you are in the process of creating a connection, navigate to the **Types and Fields** tab. If you are editing an existing connection, on the dashboard, click the **Edit** button (  ) and navigate to the **Types and Fields** tab.
- Select a direction for data synchronization from the **Default Sync Direction** list. All synchronizations will be performed in this direction unless you choose to override it. Values for synchronization direction are:

- From Borland Hub** Data is only synchronized from the Borland Hub to your data source.
- To Borland Hub** Data is only synchronized to Borland Hub from your data source.
- Bi-Directional** Data is synchronized both from the Borland Hub and your data source, and vice versa. (This is the default.)

3. Click the **Add Type Mapping** button. The **Add Type Mapping** dialog box appears with the **Fields** tab selected by default.
4. The **<system name> Type** drop-down list contains all the types that you added to your data source. Select a type from the list.

 **Tip:** Borland Connect uses the data source product name for the <system name> displayed in the UI.

5. The **Borland Hub Type** drop-down list contains all the types available in the Borland Hub. Select the type you want to map to the third-party system type you just selected.

 **Note:** For connectors that support change set capabilities, such as Git or Subversion, the only item available from the **Borland Hub Type** drop-down list is `ChangeSet`. In addition, the only tab used to configure this type is the **Advanced** tab.

6. Click **Add Field Mapping**. You use the controls that appear to choose the fields for the type you are synchronizing that you want to map. For example, you might want to map the **Name**, **Description**, and **Status** fields of a **Story** type.
  - a) Select a field to map for your third-party system.
  - b) Select the synchronization direction in the **Direction** list for each field.
  - c) The **HTML Conversion** list allows you to choose if your HTML-based fields should be converted to plain text or vice-versa. Select either **No Conversion**, **From Borland Hub**, or **To Borland Hub**.
  - d) Select the **Borland Hub Field** to map to your field.
  - e) If you have created user maps and you are currently mapping a user-based field, click the **Enable User Map** option.

 **Tip:** If the fields you are synchronizing use different values, you will want to create a value map. See [Adding Value Maps to Types](#) for more information.

7. Click the **OK** button to save your mappings and close the **Add Type Mapping** dialog box, or click the **Relationships** tab to specify the relationships you want to synchronize as described in [Adding Relationships to Types](#).

### Adding Relationships to Types

Most systems store relationship data as a standard property of an asset. So in order to synchronize relationships, Borland Hub needs to know the name of the property, type of data in the property, the relationship type you want to store the type as, and the direction in which you wish Borland Connect to synchronize this data.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box, click the **Relationships** tab. If you are editing an existing connection, click the **Relationships** button () on the **Types and Fields** tab of the **Update Connection** window.
2. Click the **Add** button for each data source relationship you want to map. A new row appears in the list. The first column displays the **Type** name.
3. In the **Field Name** column, select the name of the property that contains the relationship value.
4. In the **Field Data Type** column, select the type of data stored in the property. For example, a Rally Work Product property contains `Type` or `Defect` type data.
5. In the **Type of Relationship** column, select one of the fixed list of relationship types found in the Borland Hub.
6. In the **Direction** column, select the mapping direction:

- From Borland Hub** Data is only synchronized from the Borland Hub to your data source.
- To Borland Hub** Data is only synchronized to Borland Hub from your data source.
- Bi-Directional** Data is synchronized from the Borland Hub to your data source, and vice versa.

7. Click the **OK** button.
8. If you are in the process of creating a connection, optionally click the **<system name> Sync Criteria** tab to specify criteria you want to use to restrict synchronization to certain system assets. See [Adding Data Source Sync Criteria to Types](#) for more information.

 **Tip:** Borland Connect uses the data source product name for the <system name> displayed in the UI.

### Specifying Synchronization Criteria for Third-Party Types

If you want, you can specify criteria that Borland Connect will use to restrict synchronization to a certain subset of types. You do this by selecting a type from your data source and creating a query to specify the values you want that type to match in order to be synchronized. You can use **AND** or **OR** operators to define as many query clauses as needed. For example, you could write a query to select only those `Rally Hierarchical Requirements` whose `type=Story` and whose `status=New`.

 **Tip:** You can also specify synchronization criteria for Borland Hub types. See [Adding Borland Hub Sync Criteria to Types](#).

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box, click the **<system name> Sync Criteria** tab.

 **Tip:** Borland Connect uses the data source product name for the <system name> displayed in the UI.

If you are editing an existing connection, click the **Sync Criteria** button () on the **Types and Fields** tab of the **Update Connection** window.

2. Click the **Add** button. A new row appears in the list.
3. Select the data source property from the **Select Field** list. For example: `Blocked`.

 **Tip:** If your data source does not provide a list of property names, you can type it in this field.

4. In the **Value** column, enter the value that the field must contain in order to be synchronized. For example: `True`.
5. Optionally, click the **Add** button to specify synchronization criteria for another field. A field that allows you to specify **AND** or **OR** operators appears.
6. Choose the operator you want to use to construct your query.

 **Note:** You can use only one operator or the other when constructing your query. (You cannot mix **AND** and **OR** clauses, for example.)

7. If you want to specify synchronization criteria for Borland Hub types, click the **Borland Hub Sync Criteria** tab. See [Specifying Synchronization Criteria for Borland Hub Types](#). Otherwise, click **OK** to save your changes.

### Specifying Synchronization Criteria for Borland Hub Types

This optional page allows you to define what subset of data for the type should be synchronized. You will need to select a type from the Borland Hub and create a query to specify the values.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box of the **Create Connection Wizard**, click the **Borland Hub Sync Criteria** tab. If you are editing an existing connection, click the **Edit** button () on the **Types and Fields** tab of the **Update Connection** window and then click the **Borland Hub Sync Criteria** tab.

2. Click the **Add** button. A new row appears in the list.
3. Select the Borland Hub property from the **Select Field** list. For example: `Blocked`.



**Tip:** If your data source does not provide a list of property names, you can type it in this field.

4. In the **Value** column, enter the value that the field must contain in order to be synchronized. For example: `True`.
5. Optionally, click the **Add** button to specify synchronization criteria for another field. A field that allows you to specify `AND` or `OR` operators appears.
6. Choose the operator you want to use to construct your query.



**Note:** You can use only one operator or the other when constructing your query. (You cannot mix `AND` and `OR` clauses, for example.)

7. Click **OK** to save your changes.

### Modifying Advanced Values for Types

You use the **Advanced** tab of the **Type Mapping** dialog box to specify the names of the fields in your third-party system and in the Borland Hub that are used to store the unique ID of the types you are synchronizing -- if you are synchronizing stories and defects, you would enter the names of those fields here, for example.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box of the **Create Connection Wizard**, click the **Advanced** tab.

If you are editing an existing connection, click the **Edit** button () on the **Types and Fields** tab of the **Update Connection** window, and then click the **Advanced** tab.

2. Enter the names of the fields used to store the IDs of the types you are synchronizing. You must specify at least one of the type ID fields. The Borland Hub property defaults to `External ID`.
3. Click **OK**.

### Adding Value Maps to Fields

Field values sometimes vary across systems. For example, in Rally, a value for `ScheduledState` may be `Complete`, whereas the corresponding field in the Borland Hub, `Status`, uses `Fixed`. You express these differences by defining value maps as part of your connection.



**Note:** You can add value maps only after the field map between your third-party system and the Borland Hub has been created.

1. From the dashboard, click the **Edit** button () for the connection for which you will be defining one or more value maps. The **Update Connection** window appears.
2. In the **Update Connection** window, navigate to the **Types and Fields** tab.
3. In the **Enabled Types** pane, click the triangle to expand the row for the type that has a field for which you wish to create a value map. The field mappings you have defined for the selected type are displayed.
4. Click the **Edit Value Maps** button (). The **Value Maps** dialog box appears.
5. Click the **Add** button. A new row appears in the list.
6. Use the **Mapped Value** and **Borland Hub Field** fields to enter pairs of the values you want to map. For example, if you were creating a value map for `status`, you might enter `Complete` for the Rally value and `Fixed` for the Borland Hub.
7. Repeat steps 4 and 5 as needed to create additional value maps for the current field.
8. Click the **OK** button. The **Value Maps** dialog box closes.

9. Click the **Save** button on the **Update Connection** window to save your changes.

### Adding Projects to a Connection

The last step of defining a connection is to map the projects from your data source to the projects in the Borland Hub.

1. If you are in the process of creating a connection, navigate to the **Projects** tab in the **Create Connection Wizard**. If you are editing an existing connection, click the **Edit** button (  ) on the dashboard for the connection whose projects you wish to specify, and then navigate to the **Projects** tab of the **Update Connection** window.
2. Click the **Add** button. A new row is added to the list.
3. Select the project you want to map from the **<system name> Project** list.

 **Note:** If you are using the email connector, you won't be selecting a project, you will be specifying an email address for Borland Connect to monitor. So, double click the list and type in the email address using the format: emailAlias:password.

 **Tip:** Borland Connect uses the data source product name for the <system name> displayed in the UI.

4. Select the corresponding Borland Hub project from the **Borland Hub Project** drop-down list.
5. Project synchronizations are enabled by default. If you wish to disable it, clear the check box.
6. Some data sources for SCM tools (like Git and Subversion) allow you to specify a deeper directory level synchronization. If it's available and you want to specify a directory deeper than the root directory for synchronization, click the directory button (  ).

The **Set Project Path** dialog box opens.

For each data source, enter the path in the fields provided. Use the following formats:

**Borland Hub** Full URL to project. To obtain this, open the Borland Hub, right click a project and select **Copy URL**.

**Git** Start the path with a /. For example: /ProjectName.

**Subversion** The repository is already specified on the **Connection Projects** page, so start the path with /. For example: /ProjectName.

Click the **OK** button to close the **Set Project Path** dialog box.

7. Once you have added all projects you want to synchronize, click the **Save** button to save your changes.

## User Maps

User maps define users that have different user names across multiple systems. For example, a user may be `User1` in Rally and `User 1` in the Borland Hub. User maps allow you to map these two users together so the systems know they are the same user. Use the following sections to learn how to create a user map and then to turn it on at a field level.

### Creating User Maps

1. On the main Borland Connect UI, click the **User Maps** tab.
2. Click **Add User Map**. A row is added to the list.
3. Double click the `User Map` text in the **Name** field.
4. Rename the user map. This value is only used in Borland Connect and can be whatever you want it to be.
5. In the user map row, click  (**Add**). A new `user name` row is added as a child to the user map.

6. In the **Datasource** column, double click the new row to enable the list. Select the proper datasource for the user.
7. Double click the `User name` text in the **Name** field and type in the user name as it exists in that datasource.
8. Follow the same steps to add additional users/datasources to the user map.

### Enabling User Maps

If you have created user maps, you still need to turn them on for the user fields.

1. Open a connection.
2. Navigate to the **Types and Fields** page.
3. Select a type and click  (**Edit**).
4. For each user-based field in the list, put a check in the **Enable User Map** column.

## Home

 **Home** is your starting page where you manage Projects, generate Reports, view recent activity and, for administrators, administer the application with the **Administrator Tools**.

The activity feed shows the latest changes since your last login. At a glance, you can view changes to your items, tracking status on Requirements and Stories, and warnings which highlight items that Atlas has identified may need action.

If you would like to open an item in your activity feed, click  (**Go to**) as you mouse over an item and Atlas will take you there.

## Working with Projects

Use the **Home** perspective () to work with Projects.

### Creating a Project

You must create Projects in order to add Whiteboards and Requirements. Projects organize the information into a high-level category.

1. Click  (**Home**).
2. Click **New Project**. The **Create Project** dialog box appears.
3. Type the **Name** of the Project.
4. Choose the visibility option from the list.
5. Enter the **Project Description**.
6. Click **Create**.



**Tip:** To view activity on the new Project, click  (**Favorites**) next to the Project **Name**.

### Deleting a Project



**Note:** This procedure can only be performed by Project administrators.

1. Click  (**Home**).
2. Hover over the Project you want to delete.

3. Click  (Delete).

## Editing a Project

1. Click  (Home).
2. Hover over the Project you want to edit.
3. Click  (Edit).
4. Make changes to the Project **Name** or **Description**.
5. Click **Save**.

## Opening a Project

You must open a Project before you can create whiteboards, create requirements, create plans, and track plans.



**Note:** After you've selected favorite Projects by clicking the **Favorite** icon () , you can open Projects from your **Favorites** list.

1. Click  (Home).
2. Optional: Type the Project name in the **Find Project** field. The **ProjectProject** list displays projects matching the name.
3. Select a Project from the **Project** list. The Project becomes active and you can navigate through perspectives for the Project.

## Creating Reports

You can create **Requirement** Reports, **Plan Review** Reports, and **Plan Tracking** reports from the **Home** perspective. The reports are output as Word Document (DOCX) files.

**Requirement** Includes all Project Requirements, unless a Filter is set.

**Plan Review** Includes selected Plan and its associated Requirements for the Project.

**Plan Tracking** Includes selected Plan that is in production and the Requirements, Stories, and status within it.

## Generating Requirements Reports

1. Click  (Home).
2. Choose a Project from the **Available Projects** list.
3. Click **Report**.
4. Select **Requirements**.
5. Optional: Select a quick Filter to include only items for a specific set.
6. Check or un-check the information to include in the Report:

<b>Attribute</b>	Includes the User Defined Attributes for the Requirement.
<b>Relationships</b>	Includes a list of the items related to each Requirement.
<b>Tags</b>	Includes the Tags associated with the Requirements.
<b>Discussions</b>	Includes the Discussion threads associated with each Requirement.
<b>Delivery Tracking</b>	Includes the tracking status.

7. Click **Generate**. The Report is generated as a DOCX file and your browser provides the option to open or save the file.

## Example Requirements Report

The Requirements Report contains a cover page and a table of contents. The cover page contains the Project name, the type of Report, who generated the report, and the date the Report was generated.

The body of the Report appears as:

### Use Cases

**Owner:** Administrator **ID:** 2507  
**Type:** Business Requirement **Revision:** 1.3  
**Priority:** Could Have **Modified:** May 01, 2015, 02:05 PM BST

**Status:** Deliverable  
**Rank:** 0 **Estimate:** 0

**Hierarchy:**  
*Use Cases is a top level requirement.*

This item is used as a high level folder for all Atlas use cases.

Review the children of this item for details...

### Attributes

Contractor	
Contractor Names:	asdf

Example UDA Group	
Reward:	1
Team:	asdf
AtlasWorkflowStatus:	Deliverable

### Relationships

*No relationships assigned.*

### Tags

- Server

### Discussions

Administrator on June 11, 2015 at 12:30  
@markho - lets talk over some of these

### Delivery Tracking Information

Delivery Status:	Not Shared
Plans:	None

This Requirement is not yet shared on...

The example image is displayed as a two page spread to showcase all the selected options within the Report.

## Generating Plan Review Reports

The **Plan Review** Report contains information for Plans that have not been pushed to an Agile tool. These are Plans that are still being developed.

1. Click  (**Home**).
2. Choose a Project from the **Available Projects** list.
3. Click **Report**.
4. Select **Plan Review**.
5. Choose the Plan from the **Plan** list.

6. Check or un-check the information to include in the Report:

- Attribute** Includes the User Defined Attributes for the Requirement.
- Relationships** Includes a list of the items related to each Requirement.
- Tags** Includes the Tags associated with the Requirements.
- Discussions** Includes the Discussion threads associated with each Requirement.
- Delivery Tracking** Includes the tracking status.

7. Click **Generate**. The Report is generated as a DOCX file and your browser provides the option to open or save the file.

### Plan Review Report Example

The **Plan Review** Report contains a cover page and a table of contents. The cover page contains the Plan name, Project name, the type of Report, who generated the Report, and the date the Report was generated.

The body of the Report appears as:

#### Plan Overview

<b>Start Date:</b> May 27, 2015 BST	<b>Estimated Effort:</b> 0
<b>End Date:</b> June 23, 2015 BST	<b>Estimated Capacity:</b> 20.0
<b>Estimated Delivery Date:</b> May 27, 2015 BST	<b>Requirements:</b> 0

#### Discussions

*There are no discussions.*

The remainder of the Report lists the associated Requirements, displayed the same as in the **Requirement Report**.

## Generating Plan Tracking Reports

**Plan Tracking** Reports contain Plans that have been pushed to your Agile tool and are in production. These Reports include Story data from the Agile tool as well as the Requirements information and Plan information from within Borland Atlas.

1. Click  (**Home**).
2. Choose a Project from the **Available Projects** list.
3. Click **Report**.
4. Select **Plan Tracking**.
5. Choose the Plan from the **Plan** list.
6. Check or un-check the information to include in the Report:

- Attribute** Includes the User Defined Attributes for the Requirement.
- Relationships** Includes a list of the items related to each Requirement.
- Tags** Includes the Tags associated with the Requirements.
- Discussions** Includes the Discussion threads associated with each Requirement.

**Delivery Tracking** Includes the tracking status.

7. Click **Generate**. The Report is generated as a DOCX file and your browser provides the option to open or save the file.

### Plan Report Report Example

The **Plan Tracking** Report contains a cover page and a table of contents. The cover page contains the Plan name, Project name, the type of Report, who generated the Report, and the date the Report was generated.

The body of the Report contains Plan details, Plan status, Requirements, and Story data. The body of the Report appears as:

#### Plan Overview

**Start Date:** April 30, 2015 BST

**End Date:** June 01, 2015 BST

**Items:** 2

**Completed:** 0% (None)

**Started:** 0% (None)

**Not Started:** 100% (2 items)

**Blocked:** 0% (None)

#### Discussions

*There are no discussions.*

The Requirements for the Plan appear as follows depending on the options selected:

## Add multi-selection list type UDA

Owner:

ID: 2658

Type: Business Requirement

Revision: 1.0

Priority: Must Have

Modified: May 01, 2015, 10:24 AM BST



Status: Draft test

Rank: 10

Estimate: 8



### Hierarchy:

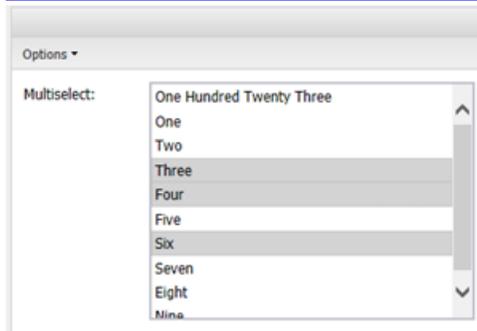
- 2550: System and User Administration
- 2649: Flexible type creation
- 2656: UDA types

NOTES: two parts:

- 1 Admin to create attribute and define values
- 2 Editing control (custom check / selection)

Support multi-selection list as an attribute type. Ideally this will contain checkboxes, and a list. We to beware of losing selected values.

<http://dev.sencha.com/extjs/5.0.0/examples/multiselect/multiselect-demo.html>



Attributes

Contractor	
Contractor Names:	
Example UDA Group	
Reward:	1
Team:	
AtlasWorkflowStatus:	Draft test

**Relationships**  
*No relationships assigned.*

**Tags**  
*No tags assigned.*

**Discussions**  
*There are no discussions.*

**Delivery Tracking Summary**

Start Date:	June 22, 2015, 04:51 PM BST
End Date:	June 24, 2015, 09:34 PM BST
Duration:	2 days
Points Completed:	0% (0/8)
Stories Completed:	0% (0/0)
Issues:	Not In Backlog

## Replying to Discussions

If you have been tagged in a Discussion or if you have a project listed as a favorite on your **Activity** view, you will receive notification that there is an unread Discussion.

1. Click  (**Home**).
2. Click the Project with the notification badge next to it. Activities for the Project appear in the **Activities** pane.
3. Click the **Quick Look** icon next to the Discussion. The **Discussion** view appears.
4. Type a reply and click **Add**.

## Viewing Past Activity Feeds

There are times when you may want to review the updates from your Activity feed from a past date. Perhaps you were unable to give it the attention you wanted when you logged in on that particular day. To view a past Activity feed:

1. Click  (**Home**).
2. Choose a Project.
3. Click  (**Actions**).
4. Click  calendar. The calendar appears indicating the dates where you can go back.
5. Choose a date from the calendar. The Activity feed displays the information that was on the feed on the date selected.

# Editing Your Profile

To edit your profile:

1. Click  (**Home**).
2. Click your user name and choose **Edit Profile**. The **Edit your profile details** dialog appears.
3. Change your **Logon Name, Password, Name, Email Address, or Phone Number**.
4. Click **Save**.

# Gather and Share ideas

How many times have you been in a requirements planning session and used a physical whiteboard? Whiteboards help you express an idea or a concept. They use drawings and text to convey your ideas to the team. Some team members are visual and rely on drawings, while others use descriptive lists or steps.

Atlas captures all of this in the **Gather** perspective () with Whiteboards and Concepts.

1. Whiteboards are containers for Concepts.
2. Concepts are comprised of many forms of media: text, pictures, URLs, etc.
3. **Gather** allows you to *discuss* these Concepts and collect feedback from all team members with the Discussion panel.
4. You can then organize your Concepts into well-formed Requirements.

# Using Whiteboards

Whiteboards are containers that hold Concepts. Use the topics in this section to help you work with Whiteboards.

## Creating a Whiteboard

All Projects contain a default Whiteboard but you can create additional ones for your Project.

1. Click  (**Gather**).
2. Click **New Whiteboard**.
3. Type the Whiteboard name in the field.
4. Click **Create**. The new Whiteboard appears in the **Whiteboard** list and is opened and ready for adding Concepts.

## Editing a Whiteboard

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the selected Whiteboard.
4. Type the new name.
5. Press **Enter**.

## Deleting a Whiteboard



**Note:** You need to remove all content from a Whiteboard before you can delete it.

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click **Delete**.

## Finding a Whiteboard

1. Click  (**Gather**).
2. Type the name or creator of the Whiteboard in the **Find Whiteboards** field. The Whiteboards matching the search criteria appear in the **Whiteboards** list.

## Working with Concepts

Concepts are the items that you add to Whiteboards. A Concept can be a system file, note, or a URL.

### Creating Concepts

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click  (**Add Concept**) at the bottom of the screen. The **Create Concept** dialog box appears.
4. Select one of the tabs to add that type of Concept:

**Attachment** Allows you to attach a file as a Concept. File types can include videos, documents, presentations, PDFs, and more.

Enter the **File Name**, **Title** and **Description**.

**Note** Allows you to type any text you want and include a rich description (including text, links, and images) for it.

**Link** Allows you to add a URL. Enter the **URL** address, a **Title** and **Description**.

5. Click **Add**. The Concept is added to your Whiteboard.

### Downloading Concept Files

Some types of system files cannot be viewed directly in Atlas, such as Microsoft Power Point and Excel files. You will need to download the files to view them.

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the Concept to open it. The selected Concept opens. If the file cannot be viewed within Atlas, the message `This Concept can't be viewed within Borland Atlas. You can download it instead` appears.
4. Click **download it instead** to save the file. If you have the appropriate application, you can choose to open the file in the application. If you choose to save the file, the downloaded file name is saved with the original file name.

### Emailing a Concept to the Inbox Whiteboard

The project administrator must create an email account and configure Atlas to connect the email account with the Inbox Whiteboard.

Sometimes an idea occurs at the most inopportune times. For example, you may be out getting a cup of coffee and you sketch your idea on a napkin. You can snap an image of that napkin with your phone and email it directly to an Atlas **Inbox** Whiteboard.

1. Attach an image or write an email and address the email to the address your project administrator created.
2. Send the email.
3. Log into Atlas.
4. Open the project.
5. Click  (**Gather**).
6. Open the Whiteboard named **Inbox**. The latest email appears in the upper left corner. From here you can start a Discussion, move the Concept to another Whiteboard, or associate it with another Concept, Story, or Requirement.

## Using Discussions with Concepts

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the Concept to open it.
4. Click the **Discussions** tab.
5. Type @ in the **Your message...** field to open the list of team members.
6. Select the team member(s) from the list to tag them in the Discussion.
7. Type a comment in the field to start the Discussion.
8. Click the **Add** button to send the message. If your administrator configured email notifications, the recipient of the Discussion will receive an email with the link to the Concept.



**Note:** In order for email notification to work, users must include their email address in their Atlas [User Profile](#).

## Creating a Relationship from a Concept

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click  (**Manage Relationships**).
5. In **Add Relationships**, click the tab for the item type. The list of items appear.
6. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
7. Double-click, drag and drop, click the plus, or click **Add** for the item from the **Results** list. The item appears in **Existing Relationships**.

## Saving Concepts as Requirements

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click  (**Manage Relationships**).
5. Click **New Requirement**. The **Create Requirement** dialog appears.
6. Select a Requirement Type from the list.
7. Click **Save & Close**.

## Importing a Concept to Create a Requirement

If your Concept is a Microsoft Word DOCX document, you can import the concept to create a Requirement. Atlas reads a Word document and creates Requirement names from headings. The text directly beneath

headings is converted into the Requirement descriptions. Hierarchies are not preserved from importing from headings to Requirements.

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click  (**Manage Relationships**).
5. Click the **Import** tab.
6. Click **Generate**.

## Creating a Filter

Filters can be created and saved for reuse across a Project in **Gather** and **Define** perspectives.

1. Click  (**Filter**). The **Filter** area appears.
2. Select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.
3. Select an operator from the **Conditions** list (i.e., *begins with*, *>=*, *>*, etc.).
4. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.
5. Click **Create**.
6. You can add another level to the Filter or you can test, save, save as, or clear the Filter.

## Using Saved Filters

Filters can be created and saved for reuse across a Project in **Gather** and **Define** perspectives.

1. Click  (**Filter**). The **Filter** area appears.
2. If you have saved a Filter, click the Filter in **Saved Filters** list and click the **Filter** icon. All results matching the filter criteria appear in the results.

## Define and Scope Your Requirement

Requirements define how you want change your application. They should be defined such that the people involved in planning, building, testing, delivering, maintaining, and using the application can clearly understand what needs to be done.

The **Define** () perspective provides two ways to view Requirements:

### Tree View

Contains the hierarchical tree view of your Requirements. You can select a Requirement in the tree and then select one of it's fields to edit them.



**Tip:** In the Requirement tree, click  next to the Requirement for additional actions such as **Breakdown**, **Send to Backlog**, **Delete**, etc.



**Tip:** In the Requirement , click  to show the Requirement ID in the Requirement tree.

### Grid View

Use this view to display all Requirements in a list. To customize the columns that appear, right-click in the header row and select the column you want to appear in the grid, such as User Defined Attributes.



**Tip:** Click  (**Tools**) as you mouse over a Requirement and select **Open** to open the item in another window.

You can also select a Requirement and view its description in the lower pane of the **Grid View**.

## Creating a Requirement

The administrator must have associated Requirement Types with the Project before you can create Requirements.

1. Click  (**Define**).

2. Click  (**Create new Requirement**).

To create a child Requirement, select the Requirement in the list, and click **Create new Requirement > Create Above...** or **Create new Requirement > Create Below...**

The **Create Requirement** dialog box appears.

3. Choose a Requirement Type from the list.

4. Type a title for the Requirement in the **Title** field.

5. To continue adding Requirements, press **Enter**. The **Create Requirement** dialog remains open and ready for the next Requirement.

6. Click **Save and Close** to save the Requirement and close the dialog or **Save and New** to save the Requirement and leave the dialog open to create another Requirement.

## Working with User Defined Attributes

Your administrator may have created User Defined Attributes (UDAs). UDAs are custom fields designed for each specific Requirement Type.

To access the UDAs while creating a Requirement, click the **Attributes** tab. If you are in the Grid View, UDAs have their own columns.

The possible field types are text, numerical, lists, and multiple selection lists. To add or remove data from a multiple selection list, click the . The list of available options appears. Select or deselect the items to add or remove them.

## Editing a Requirement

1. Click  (**Define**).

2. Choose a Requirement from the **Requirements** list.

3. Click the editable fields to make them active.

The **Title**, **Owner**, **Type**, **Rank**, **Priority**, **Estimate**, and **Description** can be changed.

4. Click **Save**.

## Copying and Pasting Requirements across Projects

You may have requirements in one project that you'd like to reuse in another. However, you don't want to reuse all requirement so an import and export would require too much pruning work to be efficient. Atlas allows you to copy your selected requirements across projects with a simple copy and paste.

1. Click  (**Define**).

2. Choose a Requirement from the **Requirements** list.
3. Click  **Copy** or choose **Copy** from the  **Action** menu. The Requirement(s) copied (including list of Requirement IDs and Project ID) are stored in the clipboard. The information remains in the clipboard until another copy is performed. You can change perspectives, perform other actions, etc. and still come back and paste Requirements.
4. Click  (**Home**).
5. Open the Project where you want to paste the Requirements.
6. Click  (**Define**).
7. Place your cursor where you'd like to paste the requirements within the tree.
8. Click  **Paste**, **Paste Above**, or **Paste Below**. The basic copy of the requirements are placed into the tree, including any attached files. Relationships and child Requirements do not copy and paste with the selected Requirements.

## Breaking Down a Requirement

Atlas supports hierarchies for organizing Requirements. After you have created parent Requirements, you can add child Requirements to refine and organize.

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click  (**Actions**).
4. Select **Breakdown**. The **New Requirement** dialog appears.
5. Choose a Requirement Type from the list.
6. Type a title for the Requirement in the **Title** field.
7. To continue adding Requirements, press `Enter`. The **New Requirement** dialog remains open and ready for the next Requirement.
8. Click **Save and New** or **Save and Close**.

## Prioritizing and Sizing a Requirement

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click one of the fields to active it.
4. Edit the appropriate fields.
5. Click **Save**.

## Creating a Relationship from a Requirement

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Choose a Project from the **Project** list.  
By default, the current Project is listed.
5. Click the appropriate tab for the item type with which to create a Relationship.
6. Choose the item from the list.  
For Requirements and Stories, you can create new if one does not already exist.

7. Click **Add**.

## Viewing and Accessing Plans from the Requirements Tree

1. Click  (**Define**).
2. Click the **Tree View** .
3. Locate the Requirement.
4. Click the plan link by the Tracking chart.
  - If the Requirement is not associated with a Plan, the link states **none**. Click the link to open the **Add a Plan** dialog box. Within this dialog box, you can select a Plan to which to add the requirement.
  - If the Requirement is associated with one Plan, the Plan name is a link. Click the link to open the Plan in View mode.
  - If the Requirement is associated with more than one plan, click the name to show a list. Click a name in the list to open the plan to open in View mode.

## Viewing and Accessing Plans from the Requirements Grid

1. Click  (**Define**).
2. Click the **Grid View** .
3. Locate the Requirement and navigate to the Plan column.
  - If the Requirement is not associated with a Plan, the column states **none**. Click the link to open the **Add a Plan** dialog box. Within this dialog box, you can select a Plan to which to add the requirement.
  - If the Requirement is associated with one Plan, the column contains the Plan name as a link. Click the link to open the Plan in View mode.
  - If the Requirement is associated with more than one plan, the column displays the Plan names in a comma-separated list. Click the list to open the **Plans for Requirement** dialog box. From this dialog, you can select the plan to open in View mode.

## Using Discussions with Requirements

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Discussions** tab. The **Discussions** panel appears.
4. Type @ in the text field to open the list of team members.
5. Select the team member(s) from the list to tag them in the Discussion.
6. Type a comment in the text box to start the Discussion.
7. Click the **Add** button to send the Discussion message. If your administrator configured email notifications, the recipient of the Discussion will receive and email with the link to the Requirement.



**Note:** In order for email notification to work, all users must include their email address in their Atlas User Profile.

## Importing and Exporting Requirements

Use the topics in this section to learn about importing and exporting Requirements.

## Importing a CSV File to Create a Requirement

If your file is a CSV document, you can import the file to create requirements.

Atlas reads a CSV file and creates requirement names from the file. The CSV has to be in the appropriate format for Atlas to parse the information correctly. The headers names must match exactly to the StarTeam headings.

1. Click  (**Define**).
2. Click  (**Tools**) and select **Import**. The **Import Requirements** dialog box appears.
3. Click **Select** and navigate to the file to import.
4. Click **Import**. The information from the file is converted into Requirements and listed in the **Requirements Tree**. A report appears if there are any import errors or if the import failed due to the errors.

The following image is an example of the proper CSV format.

	A	B	C	D	E	F	G	H
1	ID	ParentRequirementID	Name	Type	MoSCoW	RichDescription	RequirementOrder	ExpectedEffort
2	1		Policy Management	Theme	Must Have	Requirements for	1	3
3	2	1	Add Vehicle Endorsement	Initiative	Must Have	Types of Vehicle	2	1
4	3	1	Income protection Insurance	Initiative	Should Have	Customers want	3	1
5	4	2	Add add Boat Policy	Feature Requirement	Could Have	Boat insurance h	4	
6	5		Payment	Theme	Must Have	Add additional P	5	3
7	6	5	Credit Cards	Initiative	Must Have	Support for diffe	6	2
8								

Items with a ParentRequirementID are created as children of the items with the same ID. Using the example image, items with ParentRequirementID of 1, Add Vehicle Endorsement Types and Income protection Insurance, are created under Policy Management.

## Importing a Word Document to Create Requirements

If your file is a DOCX document, you can import the file to create Requirements.

Atlas reads a DOCX file and creates Requirement names from the file. The DOCX file has to be properly formatted for Atlas to parse the information correctly.

- Heading 2 becomes the Requirement name.
- URLs are carried into the Requirement and are fully functional.
- Bullets, multiple columns, bold, italics, and indenting are flattened in the description of the Requirement.

Word documents do not map to other fields like a CSV file does. Import from Word reads headers and uses them as titles for Requirements. Everything else is placed in the Requirement description. The fields in the Requirement are set to their defaults.

1. Click  (**Define**).
2. Click  (**Tools**) and select **Import**. The **Import Requirements** dialog box appears.
3. Click **Select** and navigate to the file to import.
4. Click **Import**. The information from the file is converted into Requirements and listed in the **Requirements Tree**. A report appears if there are any import errors or if the import failed due to the errors.

Below is an example of a well-formed Word document:

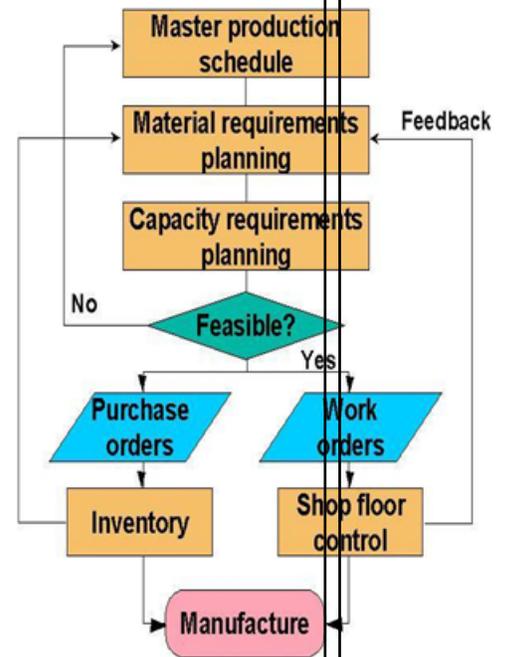
## Material Requirements Planning (MRP)

Material Requirements Planning (MRP) is a set of techniques that calculates requirements for components. MRP is the **bridge between master planning and production**. MRP creates a time-phased plan that determines what components are needed to make a product and when. This course provides you with the definition, the basic characteristics and the functions of MRP and its relationship to master planning and production activity control. It also explains the theory for understanding MRP in the framework of Manufacturing Resource Planning (MRP II) and Enterprise Resource Planning (ERP).

Participants analyze the sources of information needed to perform MRP and discuss the steps in **developing, accepting and executing a material requirements plan**. The hands-on exercise reinforces the understanding of the MRP logic.

The course covers

- Planning hierarchy
  - Sales and Operations Planning (S&OP)
  - Resource Planning
  - Master Production Schedule (MPS)
  - Rough Cut Capacity Planning
  - Material Requirements Planning (MRP)
  - Capacity Requirements Planning (CRP)
  - Order release
  - Input/output control.
  - Feedback (close loop)
- Input for MRP
  - Item master data
  - Lotsize parameters: LFL, POQ, EOQ
  - Planning parameters and planning cycle
  - Bill of Material
  - Routings
  - Planning BOM
  - Safety stock and customer service
  - Forecast and demand managemen
- MRP logic



When imported into Atlas, the Requirement is created as follows:

## Material Requirements Planning (MRP)

**Owner:** Not Assigned

**ID:** 4147

**Status:**

**Draft**

**Type:** Customer Story

**Revision:** 1.0

**Priority:**

**Modified:** Jun 1, 2015, 12:07 pm

**Rank:** 999

**Estimate:** 0



To begin editing this requirement, double-click its description or click on the field you'd like to change.



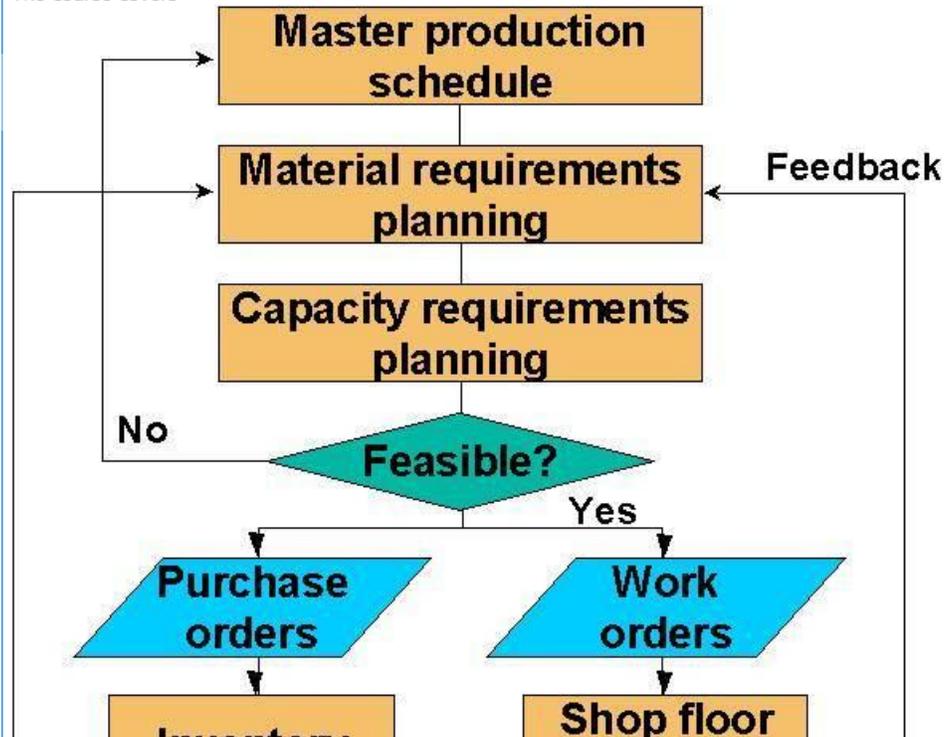
**Delivery Status**  
Not Shared



Material Requirements Planning (MRP) is a set of techniques that calculates requirements for components. MRP is the bridge between master planning and production. MRP creates a time-phased plan that determines what components are needed to make a product and when. This course provides you with the definition, the basic characteristics and the functions of MRP and its relationship to master planning and production activity control. It also explains the theory for understanding MRP in the framework of Manufacturing Resource Planning (MRP II) and Enterprise Resource Planning (ERP).

Participants analyze the sources of information needed to perform MRP and discuss the steps in developing, accepting and executing a material requirements plan. The hands-on exercise reinforces the understanding of the MRP logic.

The course covers



Note that the bold text is now in a standard font. Additionally, the graphic is dropped below the paragraph instead of aligned in a second column next to the text. If you were to scroll further down, the bulleted text will appear on one level with no bullet points in front of the text items, as follows:

Sales and Operations Planning (S&OP)  
 Resource Planning  
 Master Production Schedule (MPS)  
 Rough Cut Capacity Planning  
 Material Requirements Planning (MRP)  
 Capacity Requirements Planning (CRP)  
 Order release  
 Input/output control  
 Feedback (close loop)  
 Input for MRP  
 Item master data  
 Lotsize parameters: LFL, POQ, EOQ  
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## Exporting to a CSV File

You can export Requirements into a CSV file in order to create your own documents for presentations or reports. You can also use the export to then import the Requirements into a different project.

1. Click  (**Define**).
2. Select the Requirements you would like to export.
3. Click  (**Tools**) and then select **Export**. The Requirements are exported to a CSV file in the default download directory of your browser. For example: C:\Users\{userid}\Downloads. The columns in the CSV match the order of the **Requirement Grid**.

Atlas provides a link to each original requirement in the last column of the exported CSV file. Copy and paste the link into a browser to navigate back to the requirement in Atlas.

## Creating Tags

Use Tags to associate Requirement Types and Concepts with each other. Additionally, Tags make Requirement Types easy to filter and search.

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Tags** tab. The Tags panel appears.
4. Click **New Tag**. The **New Tag** dialog opens.
5. Type a name for the Tag and click **Save**. The new Tag appears in the **Tag** list.

## Attaching a File to a Requirement

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.

3. Click the **Attachments** tab. The **Attachments** panel appears.
4. Click **Attach File**. The **Attach File** dialog appears.
5. Click **Select**.
6. Browse to the file you want to attach.
7. Click **Add**. The file is added to the requirement and appears in the **Attachments** panel.

If there are several files attached to the Requirement, you can sort by time added or alphabetically. Click the relevant sort icon.

Click  (**Download File**) next to the file name to download the file and open it in the appropriate application.

## Retrieving a Deleted Requirement

The Recycle Bin retains all the deleted requirements from a Project. It displays the last 50 deleted Requirements. To aid in finding requirements, you can use Find or search within a month and year.

1. Click  (**Define**).
2. Click  (Recycle Bin).
3. Type the name of the Requirement in the **Find** field or click  (calendar) and select month and year. The Requirements meeting your criteria are listed.
4. Select your Requirement.
5. Click  (restore). The Requirement is restored to the Project, including any attachments.

## Saving a Requirement as a Story

The best option to save a Requirement as a Story is to send Requirements into plans using the **Plan** perspective. This allows you to estimate the size of your Project, Plans, and iterations. However, you can also send your Requirement to backlogs.

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click  (**Actions**).
4. Select **Send to delivery Backlog....** This action is only available if there is an estimated size value greater than zero. The **Create Story** dialog appears.
5. Type a name for the Story.
6. Type a description.
7. Click **Create**.

A link back is generated and added to each Story created from a Requirement.

## Viewing Requirement Versions

Each Requirement contains a detailed history of its versions. The history assigns version numbers and keeps a list of when the change was made and who made the change. To view the history of a Requirement:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Versions** tab. Each version in the list contains the following fields:

- Version** When a change is made, the version number is automatically updated. The change may cause a major or minor revision number change. An administrator determines this when attribute types are defined.
- Modified Time** The date and time the change was made.
- Modified By** The name of the person who made the change.

4. Select a version.

## Comparing Versions of a Requirement

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Requirement:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Versions** tab.
4. Select a version.
5. **Ctrl+click** another version. The **Compare** button is enabled.
6. Click  (**Compare**). The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System**, **Description**, **UDAs**, **Extended Attributes**, etc) and displayed in a tree list.
7. Double click the **Description** field to view detailed differences in a new window. The **Detailed Differences** window shows exact text changes of the Requirement description.
8. Click **Options** > **Only show differences** to hide all items that haven't changed.
9. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

## Comparing Versions of a Story

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Story:

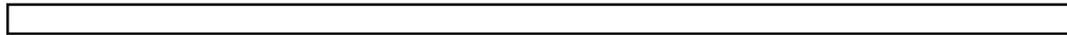
1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Click the **Story** tab.
5. Click  (**Quick Look**) next to the Story.
6. Click the **Versions** tab.
7. Select a version.
8. **Ctrl+click** another version. The **Compare** button is enabled.
9. Click  (**Compare**). The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System**, **Description**, **UDAs**, **Extended Attributes**, etc) and displayed in a tree list.
10. Click **Options** > **Only show differences** to hide all items that haven't changed.
11. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

## Viewing Requirement Status

You can view a plan's status in the **Track** perspective. However, you may only be interested in the status of a single Requirement. You can view a per-Requirement status from the **Define** perspective.

To view the status of a Requirement:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Review the status in the **Delivery Status** section. The data also includes the detail for child Requirements.



## Finding a Requirement

1. Click  (**Define**).
2. Click **Search**.
3. Type the name of the Requirement or the creator of the Requirement in the **Search** field. The Requirements matching the search criteria appear in the **Requirement** list.

## Plan Your Requirements

Business stakeholders capture and refine Requirements until they reach a point where they believe they have enough information to fulfill their product vision.

No matter how good the vision for a product is, business stakeholders have to clearly understand their delivery capacity so they can perform high level estimates and prioritize what is the minimal feature set that is required in order to get their product delivered within a given time frame

Currently, when it comes to software development, Agile is the approach of choice for development teams around the world. Agile is based on fairly simple planning concepts that allow development teams to:

- Clearly understand the priority of features that are developed and delivered.
- Keep a consistent way of estimating effort to get features delivered.
- Easily understand how much the team is able to deliver (velocity) within a given time frame (iteration).

Atlas gives project stakeholders the ability to quickly:

- Prioritize and estimate their requirements.
- Automatically gather Agile planning information (velocity and iteration duration).
- Send Requirements as Stories into their Agile Teams Backlog regardless of the Agile tool they are using.

## Creating a Plan

1. Click  (**Plan**).
2. Click **New Plan**. The **Editing Plan** dialog box appears.
3. Type a **Name** for the Plan, **Start Date**, **Target Date** for delivery, and **Weekly Capacity** in the appropriate fields.
4. Select Requirements from the **Available Requirements** column and drag them to the **Planned Requirements** column.

As you add Requirements to the **Planned Requirements** column, Atlas tracks the size versus available capacity in the **Currently in this plan** field to help your planning capacity.

You can also order the requirements. The order is retained for the specific Plan and doesn't affect other Plans in or across Projects.

5. Click **Save** to save the Plan for later editing or **Send to delivery backlog** to send the Plan to the Backlog.

## Editing a Plan

1. Click  (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click  (**Edit**).
4. Make your updates to the fields.
5. Drag and drop Requirements into the order you want within the **Planned Requirement** column.
6. Click **Save** to save the Plan for later editing or **Send to delivery backlog** to send the Plan to the Backlog.

## Reviewing a Plan

1. Click  (**Plan**).
2. Select a Requirement to add a Discuss or reply to a Discussion.  
If you select the root item of the tree structure, you can use the **Discussions** field to discuss the Plan. The root item is selected by default when opening a **Review Plan** dialog box and when filtering the Plan list.  
The description for the Story or Requirement you select displays in the bottom pane.
3. Type your message in the **Discussion** field.
4. Click **Send**.

## Creating a Relationship to a Story

You can view Requirement Relationships to a Story or create a Relationship from within the Plan.

1. Click  (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click  (**Actions**).
4. Choose **Relationships**.
5. View the Story attached to the Requirement, or
6. Click **New Story**.
7. Accept the information provided or type new information in the appropriate fields.
8. Click **Create**. The Story is added to your Agile tool and a Relationship is created with the Requirement.

## Opening a Requirement from a Plan

1. Click  (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click  (**Actions**).

4. Choose **Open**.
5. Choose **Quick Look**.

Choosing **Open** opens a new tab in the browser directly to the Requirement. Choosing **Quick Look** opens a dialog box containing the Requirement information.

## Sending Requirements to Delivery Backlogs

After you have refined your iteration plans to fit within the release time frame, you can send the Requirement to the delivery Backlog.

1. Click  (**Plan**).
2. Double-click the Plan to send to the Backlog. The Plan appears.
3. Click **Send to delivery Backlog** to send to Backlog. If the Plan is new, Atlas publishes Requirements as Stories in the Backlog and changes the status of the Plan to `committed`. Additionally, a link back to Atlas is generated and added to each Story created from a Requirement Type.

If editing the Plan, a confirmation dialog appears. Select **Create new Stories for each Requirement in the Plan** or **Only creat Storeis for new Requirements**, and click **Ok**.

## Deleting a Plan

1. Click  (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click  (**Delete**).

## Track Progress

After a Plan is set, the development team plans Sprints through their Backlog and builds and delivers your product in iterations. This approach allows the business stakeholder to review and refine your priorities as they progress.

The business stakeholder can review and refine Requirement priorities. Afterward, the agile team breaks down Requirement into multiple small sets of Stories. Priorities can be shuffled and re-shuffled within the Backlog and allocated and delivered within Sprints every 2 to 3 weeks.

Business stakeholders can track the delivery progress of their Requirements no matter how scattered and broken-down the Stories become.

The **Track** perspective in Atlas enables project stakeholders to quickly:

- Understand the total payload of a Requirement based on the actual estimates from their Agile teams.
- Check the delivery progress of a Requirement based on the progress of the Stories being delivered by Agile teams.
- View the total Plan delivery status.

## Understanding Agile Delivery At-A-Glance

1. Click  (**Track**).
2. Locate the Plan you would like to review in the **Plan** list. The status bar appears along the right of the Plan. The chart is colored using the green, yellow, red status indicators. Data from any child Requirement Types or Stories are included in the status.
3. Double-click a Plan from the **Plan** list.

4. Optional: Click  (**Info**) next to the **Filter** to view the **Legend**. The **Legend** appears below the **Plan** list. Click the **x** above the **Legend** to close it.

## Tracking Requirement Type Progress

1. Click  (**Track**).
2. Double-click a Plan from the **Plan** list.
3. On the **Tracking** dialog box, click + / - next to the Requirement Type to view the breakdown. Click  (**Info**) next to the **Filter** to view the chart legend. The legend describes the icon status meaning. The Gantt chart displays the status as related to the delivery date. Click the **Legend** button to open or close the legend.

You can use your **Quick Filters** to quickly find the requirement you would like to view. Click the **Quick Filters** list and select the filter.

4. Click  (**Quick Look**) to view individual Requirement details. The **Requirement Details** dialog box appears with tabs to view **Discussions**, **Relationships**, **InfoVersions**, and **User Defined Attributes**.

## Opening Requirements and Stories from Tracking Chart

You may want to view the details of a requirement or a story while viewing the Tracking chart.

1. Click  (**Track**).
2. Double-click a Plan from the **Plan** list.
3. Navigate to the item you want to open.
4. Click  (**Go To**).

The item opens in a new browser tab.

## Viewing Past States

While viewing a current version of a Plan or Requirements, you might want to look at the past status for understanding of changes and progress. Use the Time Machine to view a Plan's status or Requirements from a past date.

1. Click  (**Time Machine**).
2. Chose **Pick Date and Time** to select a date.
3. Select a past date in the calendar from when the Plan was create to just before the current date and click **Apply**. The top bar turns grey to indicate that you are viewing content in Time Machine.
4. Click  (**Time Machine**).
5. Click **Save** to save the point in time without creating a Label.
6. Click **Return** to return to the current information.

If you click **Search** or **Home**, you will no longer be in Time Machine.

## Creating a Label

As you review a Plan's past status and compare it to the current status, you may find you want to save it to view at a later time.

1. View a past view using the **Time Machine**.
2. Click  (**Time Machine**).
3. Click **Save**.
4. Type a name for the saved Label.
5. Type a description for the saved Label.
6. Click **Save**.

## Editing Labels

1. Click  (**Time Machine**).
2. Choose **Manage Labels**. The **Manage Labels** dialog appears.
3. Type a new name for the saved view.
4. Add more detail or type a new description for the saved view.
5. Click **Save**.

## Viewing Past Status Based on a Label

To view a past status based on a Filter created in Borland Hub:

1. Click  (**Time Machine**).
2. Chose a Label from the list. The top bar turns grey to indicate that you are viewing content in Time Machine.
3. Click **Return** to return to the current information.

If you click **Search** or **Home**, you will no longer be in Time Machine.

## Viewing Past State of Plan in Track Perspective

Within a plan in the **Track** perspective, you can view a comparison of the current status with a past status.

1. Click the **Track** perspective. The **Track** page appears.
2. Locate the plan you would like to review in the **Plan** list.
3. Select a label from the **Historic Data** list or click  (**Time Machine**) and select a date. The status bars appear for both states, offering an at a glance comparison between the current and past date.

## Viewing Details of Differences

After selecting a past date or a Label from the Time Machine, click the **Details** tab to view details of the differences between the two states.

The **Details** tab contains three panes:

- |                     |  |
|---------------------|--|
| <b>Overview</b>     | Contains a summary of changes to delivery dates, estimates, number of Requirements, and number of Stories.                                 |
| <b>Requirements</b> | Lists added, removed, and updated Requirements. Click a Requirement to go directly to the Requirement within the <b>Requirements</b> Tree. |
| <b>Stories</b>      | Lists the added, removed, and updated Stories. Click a Story to open it in your Agile tool.  |

## Viewing Versions

Atlas tracks the changes made to most of its assets.

1. Open the appropriate perspective.
2. Open the item.
3. Click the **Version** tab.
4. Select the version you want to view. The selected version appears in the dialog box.

## Relationships

Atlas uses Relationships to help you understand how different items are connected. Changing an object, whether it is a Requirement, a Concept, or a Story, has implications on other elements of the Project. For example, changing a Requirement that has already been pushed as a Story in your Agile planning tool might change the scope or complexity of the Story. Relationships are supported to allow you to see the connection between Requirements and other related development and planning information. Linking related objects together helps to ensure that changes are implemented correctly at all levels.

Atlas provides the following Relationships:

- Requirements located in the same or different Projects.
- Requirements and Stories.
- Requirements and Whiteboards.
- Requirements and Concepts.
- Requirements and Borland Hub items.
- Whiteboards and Stories.
- Concepts and Stories.
- Concepts located in different Whiteboards.
- Concept and Borland Hub items.

You can create relationships manually in Atlas through the **Relationships** tab in the **Requirement** editor or on **QuickLook** dialogs. **QuickLook** is not available for Borland Hub items. Borland Hub items are located in the **Other** tab. Borland Hub items include Agile planning, testing, defect tracking and Microsoft Office tools.

Atlas also creates some Relationships automatically for you. Whenever you push Requirements to the Backlog in your Agile planning tool, Atlas creates a Relationship between the Requirement and the Story it creates on the Backlog. You can also relate a Requirement to a Story that already exists. As well as helping you understand the Relationship between the Requirement and the Story, Atlas also uses the Relationship to track the progress of the Story.

Whiteboards and Concepts are arranged under one tab in a tree. The top level is the Whiteboard and the items below are the Concept contained within it. Drag the top-level to create a Relationship to the Whiteboard and subsequent Concepts or drag a Concept to create a Relationship to the individual Concept.

## Visualizing Relationships

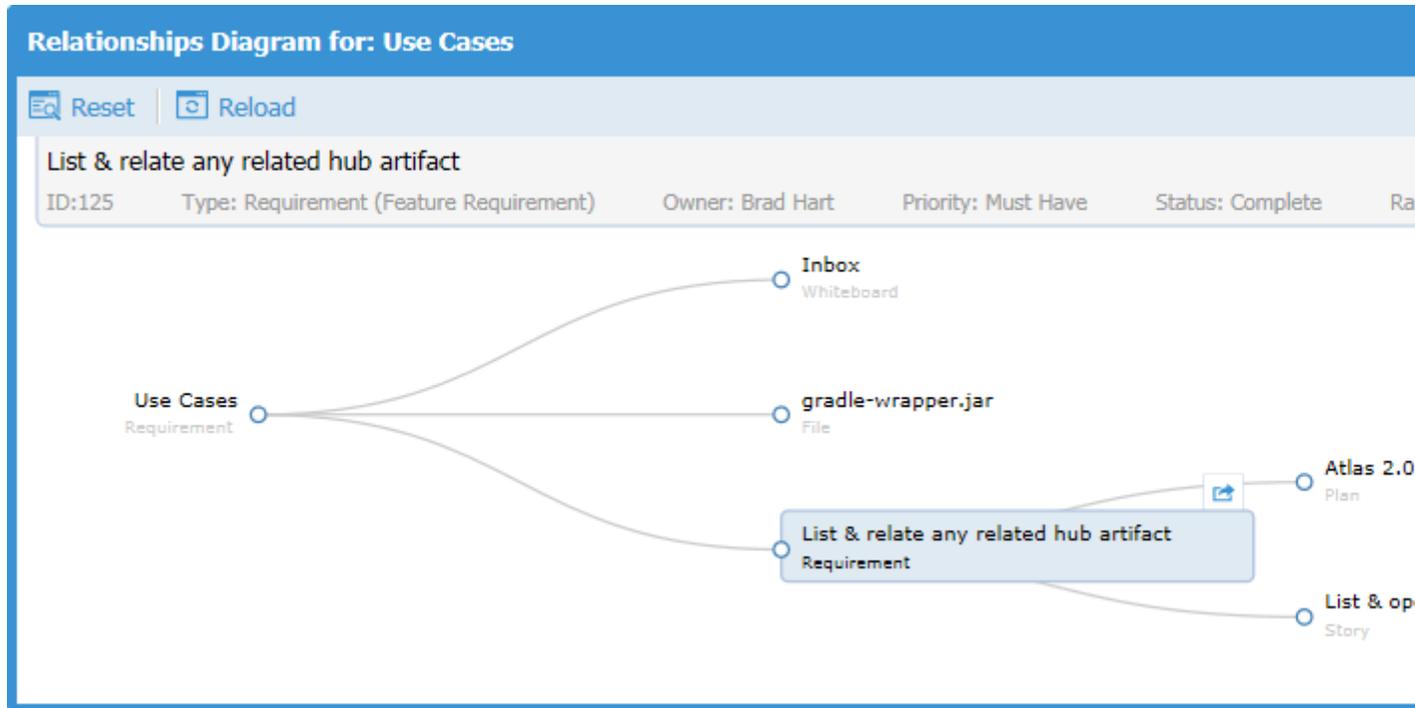
Relationships are accessed from the **Relationships** tab and appear in a list. In certain perspectives, you

can view your relationships in a diagram. When you see  **Diagram** above the **Relationships** list, click it to open the **Relationships Diagram** window. Here's how it works:

- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship levels. Cross-project relationships links (where the requirement is in another project than the current one) are highlighted orange.
- Select an item and you will see summary information on the top of the window.
- Click  (**Goto**) to go to the item in a new browser window/tab.
- The diagram is an infinite scrolling canvas that can be panned via click and drag, and zoomed via the scroll wheel.

- Click **Reset** to restore the default pan/zoom.
- Click **Reload** to refresh the diagram.
- Although item names are fixed-length on the diagram, hovering over an item displays a tool-tip with an asset's full Name, ID, Type, and Project Name.

### Relationship Diagram Example



## Viewing Status and Details of Relationship Items

You can view the status or detail of an item with a Relationship. Atlas items display status of Requirement Type or Story. Borland Hub items display according to the defaults or, in the case of custom Borland Hub items, according to what the administrator created. Borland Hub items are displayed in the **Other** tab and are organized in folders and files in a file explorer format.

The items display as follows:

<b>Requirement</b>	Status: {Status}
<b>Whiteboard</b>	Concepts: {ConceptCount}
<b>Story</b>	Status: {Status}
<b>Change Request</b>	Status: {Status}
<b>File</b>	File Size: {FileSize}
<b>Plan</b>	Start Date: {StartDate} End Date: {EndDate}
<b>Sprint</b>	Start Date: {StartDate} End Date: {EndDate}
<b>Task</b>	Status: {Status}
<b>User Defined Type</b>	Custom according to administrator setting in the Borland Hub.

1. Open the **Relationship** tab from either a Concept or a Requirement Type. The **Relationship** pane appears.

2. Scroll through the **Existing Relationships**. Below each Relationship, the status or details are listed.

## Creating a Relationship from a Concept

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click  (**Manage Relationships**).
5. In **Add Relationships**, click the tab for the item type. The list of items appear.
6. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
7. Double-click, drag and drop, click the plus, or click **Add** for the item from the **Results** list. The item appears in **Existing Relationships**.

## Creating a Relationship from a Requirement

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Choose a Project from the **Project** list.  
By default, the current Project is listed.
5. Click the appropriate tab for the item type with which to create a Relationship.
6. Choose the item from the list.  
For Requirements and Stories, you can create new if one does not already exist.
7. Click **Add**.

## Creating a Relationship to a Story

You can view Requirement Relationships to a Story or create a Relationship from within the Plan.

1. Click  (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click  (**Actions**).
4. Choose **Relationships**.
5. View the Story attached to the Requirement, or
6. Click **New Story**.
7. Accept the information provided or type new information in the appropriate fields.
8. Click **Create**. The Story is added to your Agile tool and a Relationship is created with the Requirement.

## Search

Click  (**Search**) to open the search page.

Select the button for the types that you want to search .

Select where you would like to search from the **Only show results from** list: current project, all projects, or a specific project.

Type the name or part of the name you want to search, and click **Search**.

Atlas does not search common words, such as "and," "if," "else," "then," and etc. These common words are referred to as "stop" words because they are used so often that the search would return too many non-

specific results. To view the full list of stop words or to add your company-specific stop words, open C:\Program Files\Borland\Hub <version #>\Search\config\en\_stopwords.txt..

To the right of each search result, there are icons to use:

- Go** Jump to an item in your search results. If an item is in a different project, Atlas switches your context to the other project as long as you have permission to view it. When you go to a story, Atlas opens a new window for the external URL for the tool that you use for Agile, such as Star Team Agile, Rally, Jira, etc.
- To**



**Note: Go To** is not be available for some search results if Atlas has not been integrated with the tool.

## Quick Filters

Use a *Quick Filter* to quickly find a Requirement.

You can use your **Quick Filters** to quickly find the item you would like to view. Click the **Quick Filters** list and select the filter.

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