

# Administration Guide

Defect Manager Release 4.6

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## About the Administration Guide

This guide explains how to administer the Defect Manager system and how it may be configured to meet your organization's issue reporting, tracking and resolution needs. The purpose of this guide is to provide a reference for system administrators of the system.

This Guide provides information on the following topics:

- **What is Defect Manager System Configuration?**  
An introduction to the Defect Manager System configuration.
- **Configuring Repository Settings**  
Explanations of how to tailor your Defect Manager configuration for code-values, client contacts, users, work queues, products and components you support, email, alert and reminder notices, etc.
- **Running SQL Scripts**  
Describes how to run provided scripts plus how to tailor and develop your own scripts to initially configure the Defect Manager Repository database to meet your organization's needs

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### Other Defect Manager Guides

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This guide has the following companion guides that provide additional detail on specific topics for Defect Manager:

- **Getting Started Guide**
- **Installation Guide**
- **User Guide – Defect Manager for Windows**
- **User Guide – Defect Manager for Web**
- **User Guide – E-Tech Support**
- **Programmer API Guide**
- **Glossary**

## What is Defect Manager System Configuration?

The Defect Manager System Configuration folder is used to manage all aspects of the Defect Manager system. The System Configuration folder allows the system to:

- Set system-wide configuration parameters such as e-mail, system security, E-Tech Support, system customization, etc.
- Add you team members and stake holders (developers, system testers, tech writers, management, etc.) to the system and assign them privileges
- Add individual's contacts (your clients) who can report defects
- Add companies and company locations for each contact
- Define priority codes that are valid for reported issues
- Define severity codes that are valid for reported issues
- Define status codes that can be set for reported issues
- Define users that can work on reported issues and be assigned work
- Define work queues that allow issues to be processed as a workflow of one or more work-step processes of different types employing different skills.
- Define products that issues can be reported against. Products may be associated with a hardware or software product, project, process or service.
- Define components that allow you to identify the specific module or aspect of the product, project, process or service involved with a reported issue or defect.
- Run SQL scripts to initialize administrative configurations or migrated issue-defects in the Defect Manager Repository database.

### *Initial System Setup*

Before you can use Defect Manager, you must create and configure the repository that is used to track defects. Defect Manger ships with a sample configuration that you can use. Later when you become more familiar with Defect Manager, you can create your own configuration or customize the sample configuration.

**Note:** You can load some sample configuration data into your repository for demo purposes. In the scripts sub-directory of the install directory is a SQL script called demo.sql. You can go to section: [Running SQL Scripts](#) to find out how to load this demo data.

To configure the system you will use the Defect Manager Configuration Manager. We will now walk you through this process. You will use the Defect Manager Configuration Manager to:

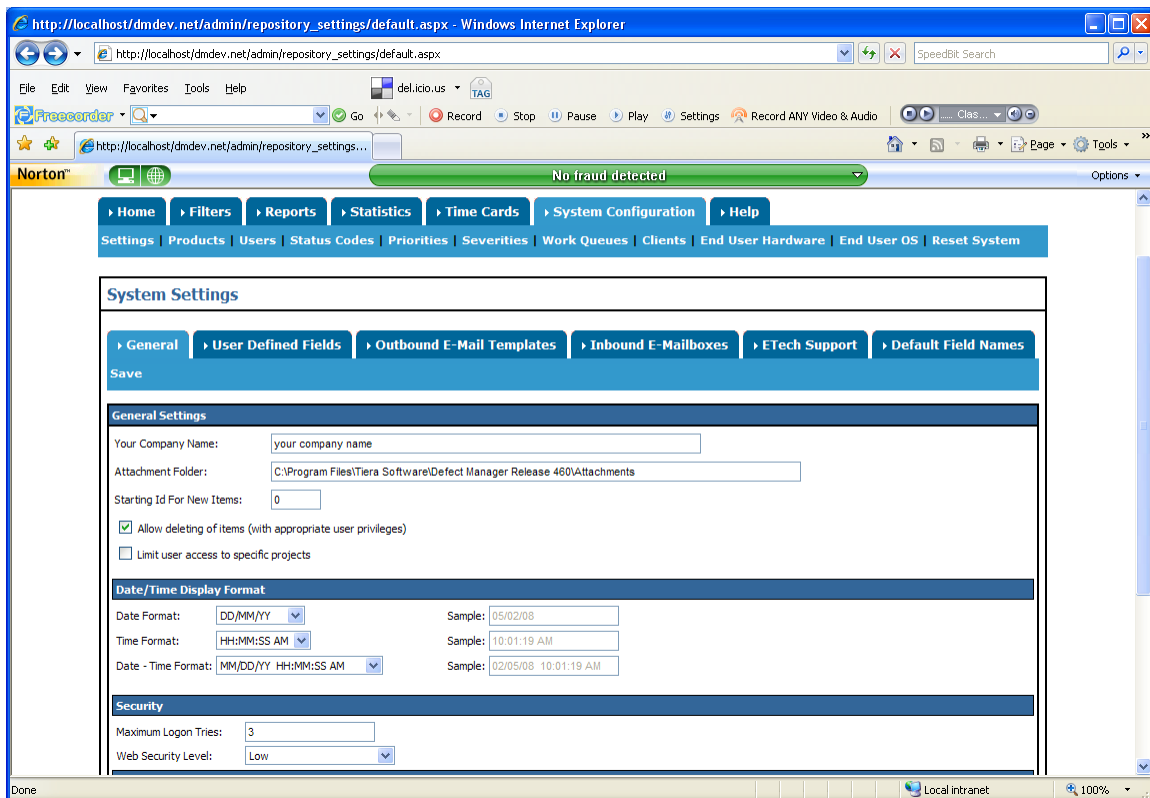
1. [Create a repository](#)
2. [Configure the repository](#)

### 3. [Configure repository items such as clients, owners, work queues, etc.](#)

Before we walk you through these steps, let's discuss the Defect Manager Configuration Manager main window and what you can do with it.

#### *Configuration Manager Main Window*

To start the Defect Manager Configuration Manager, you will need to use the following menus. From the *Defect Manager Log* you would select **System Configuration** folder as shown in the figure below.



**Figure: Defect Manager Configuration Manager – Main Window**

Under the **System Configuration** folder is the **Menu Bar** for managing specific system configuration parameters such as:

- **General Settings**
- **Products**
- **Users**
- **Status Codes**
- **Priorities**
- **Severities**

- **Work Queues**
- **Platform Names**
- **Platform Releases**
- **Reset System**

Clicking on a **Menu Bar** item will display pages that allow you to configure the selected item.

## Creating the Repository

Before you can start logging and tracking issues, you need to create and then configure the repository that will store them.

The repository is the database for the system and it is comprised of a group of relational database tables. The repository stores both *Configuration Data* and *Issue Tracking Information*:

1. *Configuration Data* – All system configuration information such as repository settings, users of the system, work queues, priorities, products, email options, client contacts along with their company and location information, etc.
2. *Issue Tracking Information* – All the issue data such as issue items with their status and timestamps, attachments, notes, etc.

You use the *Configuration Manager* as a tool to create and maintain the *Configuration Data*. Initially, you can use the *Configuration Manager* tool to run scripts to load sets of configuration data and, optionally, issue/defect tracking information.

You use the *Defect Manager Log* to interactively maintain the *Issue Tracking Information* in the repository.

Defect Manager supports Microsoft Access, Microsoft SQL Server, Oracle, databases to store the repository.

Since a Defect Manager repository can be built your selection of one of these databases management systems, you will need to define an ODBC Data Source Name (DSN) to allow the selected type of repository database to be accessed where you decide to locate it on your network.

If you are not sure how to set up the ODBC DSN connection, please refer to the [Installation Guide, Configuring Repository ODBC Connections](#).

If you are using the demo version of Defect Manager, a demonstration repository already exists that is shipped with the product. When you install the demonstration for Defect Manager, the ODBC DSN is automatically set up for you.

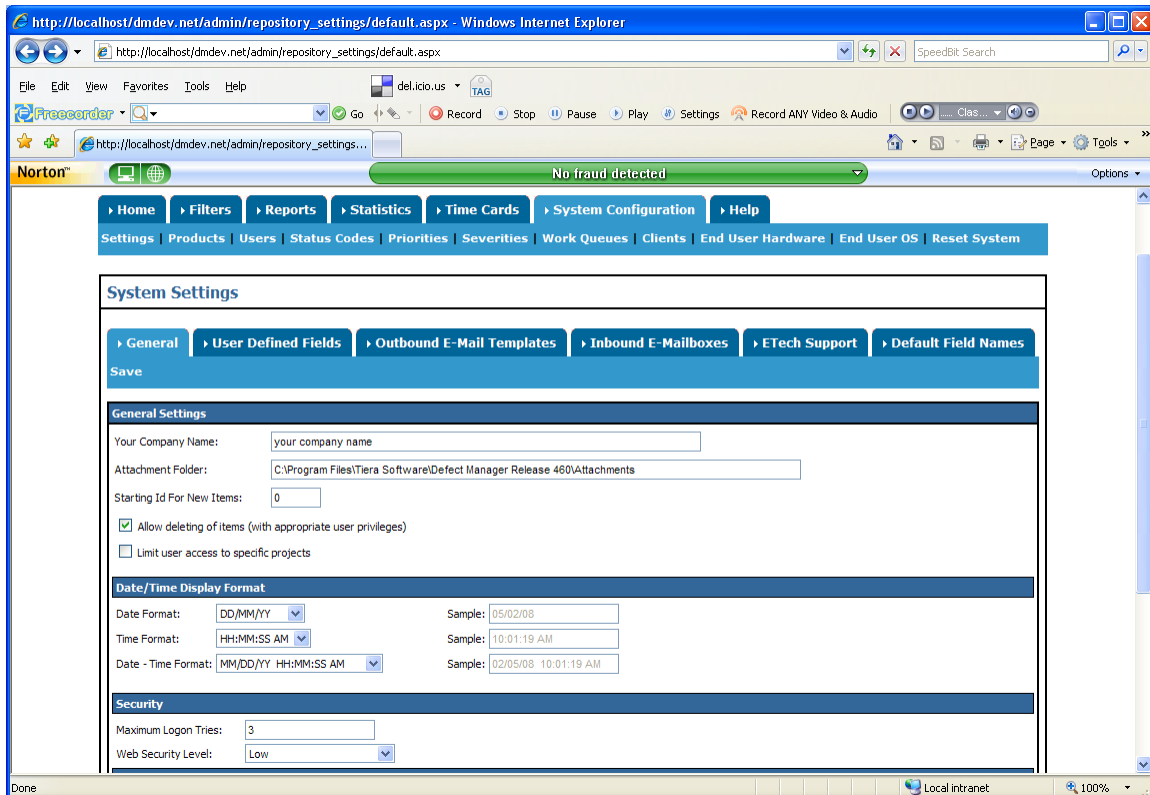
To create the repository, you will need to use the **Rest System** item in the **Menu Bar**. When you create a repository, the system will create a user named of “**Admin**” and a password of “**Admin**”.

You will need the user name and password (i.e., “Admin/Admin”) to open the repository initially. You may then change the password name to increase security and add other user names and passwords with appropriate security permissions...

The only individuals that can use the Configuration Manager and view/modify items are individuals that have the proper security settings. This is discussed more thoroughly in the section [Configuring Users](#).

## Configure Repository Settings

When you select the **System Configuration** folder, the system will always display the **System Settings** as show below:



**Figure: Configuration Manager System Settings**

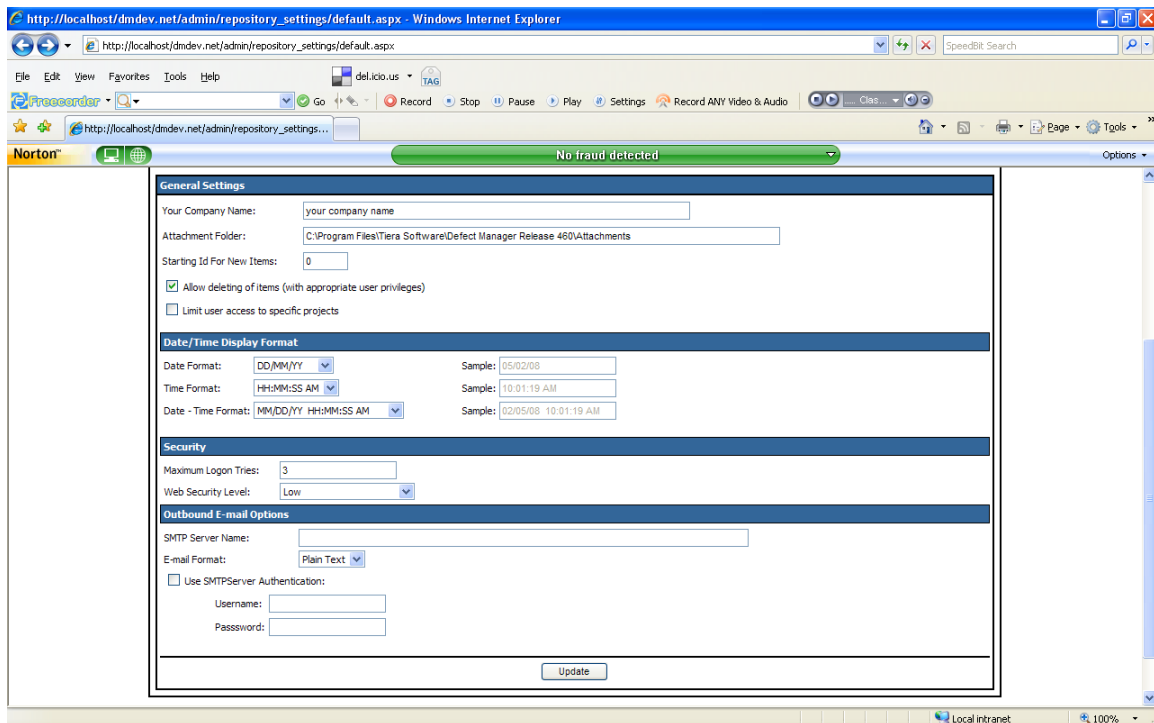
This window is divided into the following sections:

- **General** – This section allows you to set the general parameters for the system. See section [General Settings](#) for more information.
- **User-Defined Fields** – This section allows you to set configure the eight user-defined fields. See section [User-Defined Fields](#).
- **Outbound E-Mail Templates** – This tab allows you to set the e-mail parameters for e-mail alerts and e-mail auto-responders. See section [Outbound E-Mail Templates](#) for more information.

- **Inbound Mailboxes** – This tab allows you to set parameters for inbound e-mail send to the system. See section [Inbound Mailboxes](#) for more information.
- **E-Tech Support Settings**– This section allows you to set the parameters for E-Tech Support. See section [E-Tech Support Settings](#) for more information.
- **Default Field Names**– This section allows you to set the default field names in the system. See section [Default Field Names](#) for more information.

## General Settings

The General Settings section contains parameters that apply broadly to the entire repository.



**Figure: The General Settings Section**

Below are descriptions of the fields on this tab that allow you to enter data:

- **Your Company Name** – You should specify your company’s name. When logging new defects, Defect Manager will set the default company name to the value specified in this field.
- **Attachment Folder** – Specify the directory that all attachments will be placed for each issue.
- **Starting Id For New Items** – Starting number for all new issues entered into system after a new repository has been created. The default is 0. This value is only valid when the repository has just been created and there have not been any issues reported. If you change this setting after issues have already been added, this setting is ignored.

If you need to set a new starting Id after issues have already been added, please contact technical support and they can manually help you set this up.

- **Allow deleting items at a system level** – Check this box, if you want users with the delete privilege to have the power to delete issue-items from the system. If this item is not checked, deleting issues in the system is not permitted regardless of user having the delete privilege.
- **Limit user access to specific projects** – Check this box, if you want to limit users to specific projects. If you do not check this box, all users can see issue items for all products/projects.
- **Date Format** – You specify the format that will be used to format the date fields in the system.
- **Time Format** – You specify the format that will be used to format the time fields in the system.
- **Date-Time Format** – You specify the format that will be used to format the date-time fields in the system.
- **Maximum Logon Tries** – The maximum number of times that a user can try to login to the system before their account will become disabled.
- **Security Level (Web)** – Defect Manager provides three distinct levels of security when user login to Defect Manager Web. These three levels are as **Low**, **Medium** and **High**. Each security level handles the authentication of users in a different way. The next section describes each of these security levels in detail.
- **SMTP Server Name** – The SMTP sever name where all e-mail alerts and email auto-responders will be send to for distribution. Your network Configuration Manager can help you with this, if you are not sure what it is.

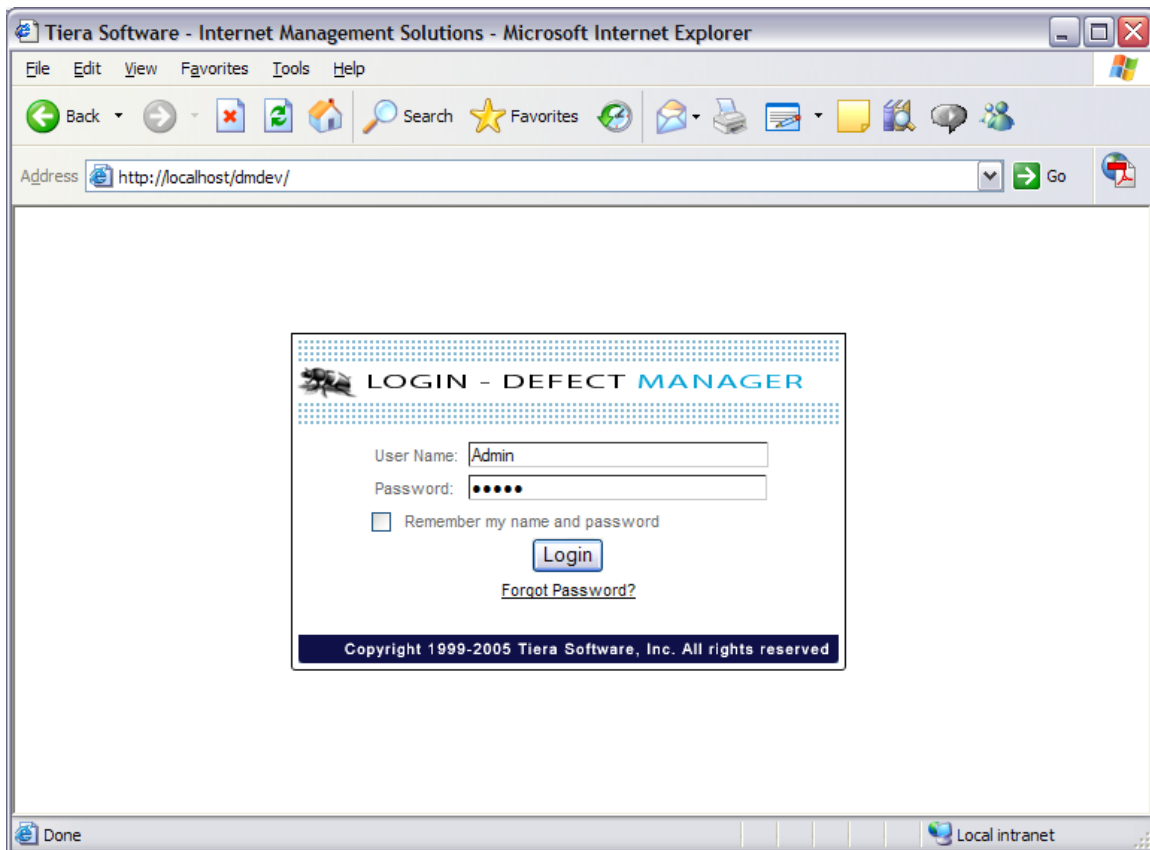
**Note:** If you will be using e-mail alerts or email auto-responders, you need to set the *SMTP Server Name* field to the correct value. If you are not using e-mail alerts or auto-responders, set this field to blanks. Setting this field to an incorrect value can degrade the system.

- **E-mail Format** – .Select the format to be used when Defect Manger sends e-mails. You can choose **Plain Text** or **HTML**.
- **Use SMTP Server Authentication** – If your SMTP server requires authentication then check this box. If you check this box, you must also enter the Username and Password that will be used by the system to authenticate itself to the SMTP server.

**Note: You can use https for Defect Manager Web. This will ensure that all the data that is viewed in the browser is encrypted.**

### *Low Security Level*

When users start Defect Manager, users get the Defect Manger login window as shown below.

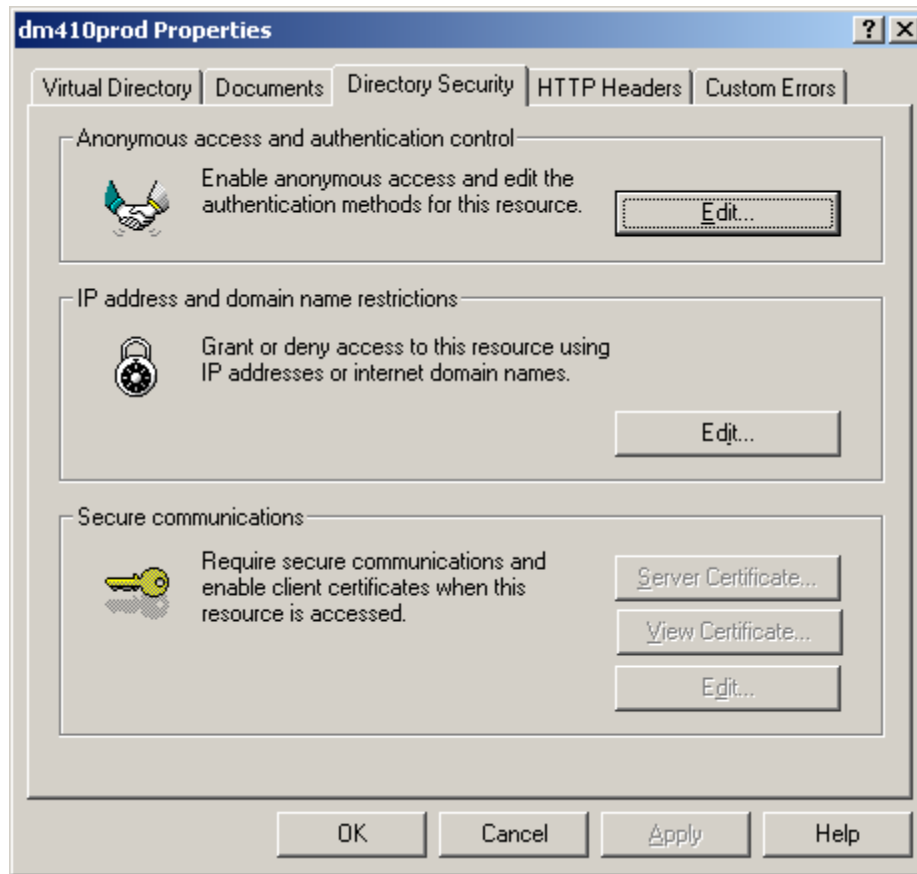


**Figure: Defect Manager Login Screen**

From this window, the user enters their **User Name** and **Password**. Defect Manager will authenticate the user by looking for the **User Name** in the repository and seeing if the entered password is correct for the user.

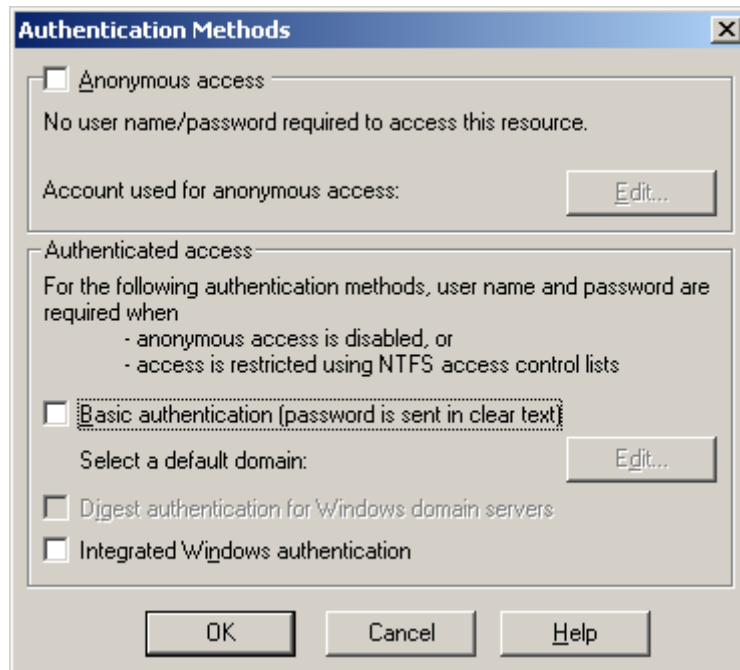
### ***Medium Security Level***

When using the Medium security level, users of Defect Manager Web will need to provide a domain **User Name** and **Password**, before they can login to Defect Manager. The medium security level uses Windows 2000/2003/XP operating system authentication protocols. Before you can use the **Medium** security level, the Defect Manager virtual directory must be configured to use one of several authentication protocols. This can be done by right clicking on the Defect Manager virtual directory in the IIS Configuration Manager and selecting the **Properties** menu item. When you select the **Properties** menu item you will see the following window.



**Figure: IIS Virtual Directory Properties Screen**

Select the **Directory Security** folder and press the **Edit** button in the **Anonymous access and authentication control** section. You will see the following screen:



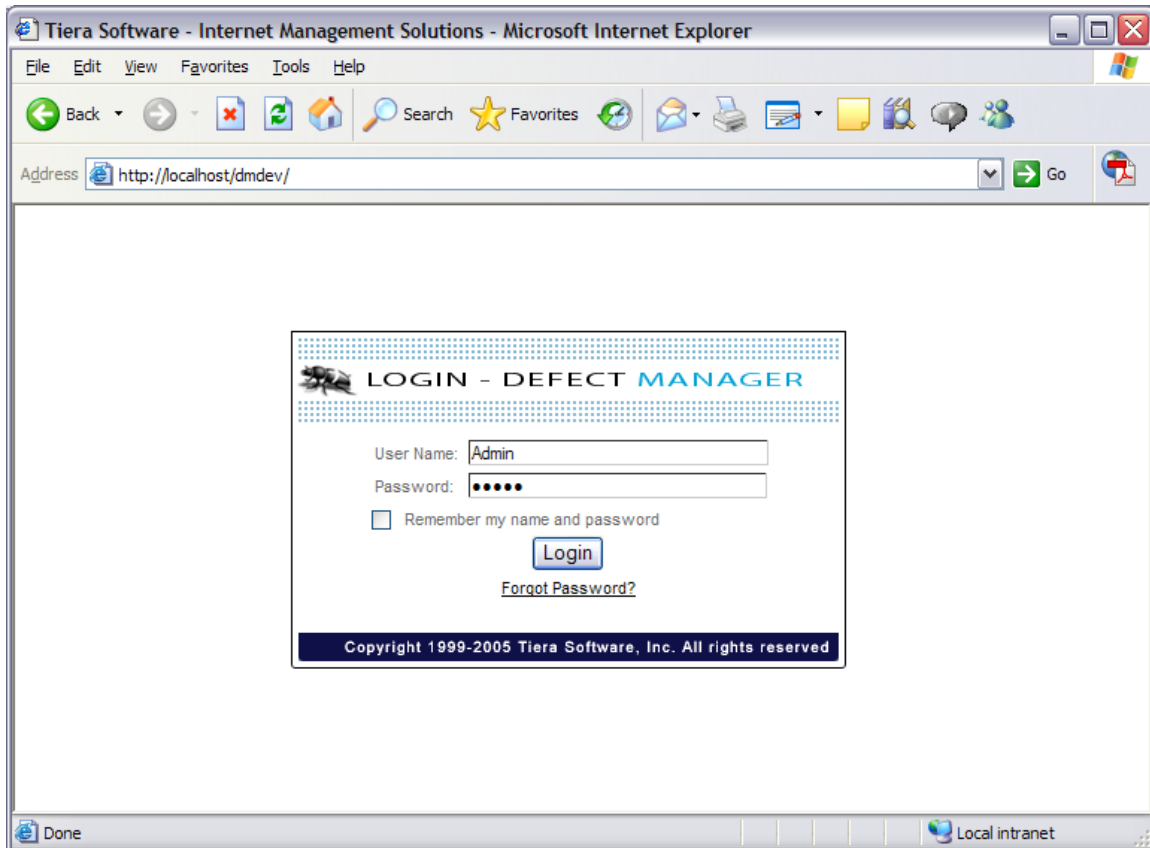
**Figure: IIS Authentication Methods Screen**

Uncheck the **Anonymous access** checkbox, and check the **Basic authentication** (password will be sent in the clear), or **Digest authentication for Windows domain servers** (password will be encrypted). Optionally, if Defect Manager is being deployed on your Intranet, you can check the **Integrate Windows authentication** checkbox. The checkbox that you select is dependent on your corporate security mandates. After making your selection and clicking the **OK** button, Defect Manager is ready to use the higher level of security. When users start Defect Manager they will be prompted with the following screen:



### Figure: IIS Authentication Screen

The user needs to enter any valid user name and password for the domain. If the **User Name** and **Password** entered are valid for a user on the domain (and the user has the appropriate privileges), the user receives the following Defect Manager Login screen:



**Figure: Defect Manager Web Login Screen**

From this screen, the user enters their Defect Manager **User Name** and **Password**. Defect Manager will authenticate the user by looking for the **User Name** in the repository and seeing if the password is correct for that user. If the user is defined to the system and the password is correct for that user, the user is granted access to the system.

### *High Security Level*

The high security level is the same as the same as the medium security level with one major difference. Each Defect Manager user must be a unique domain user as well. When the user starts Defect Manager, they will be prompted with the following screen:

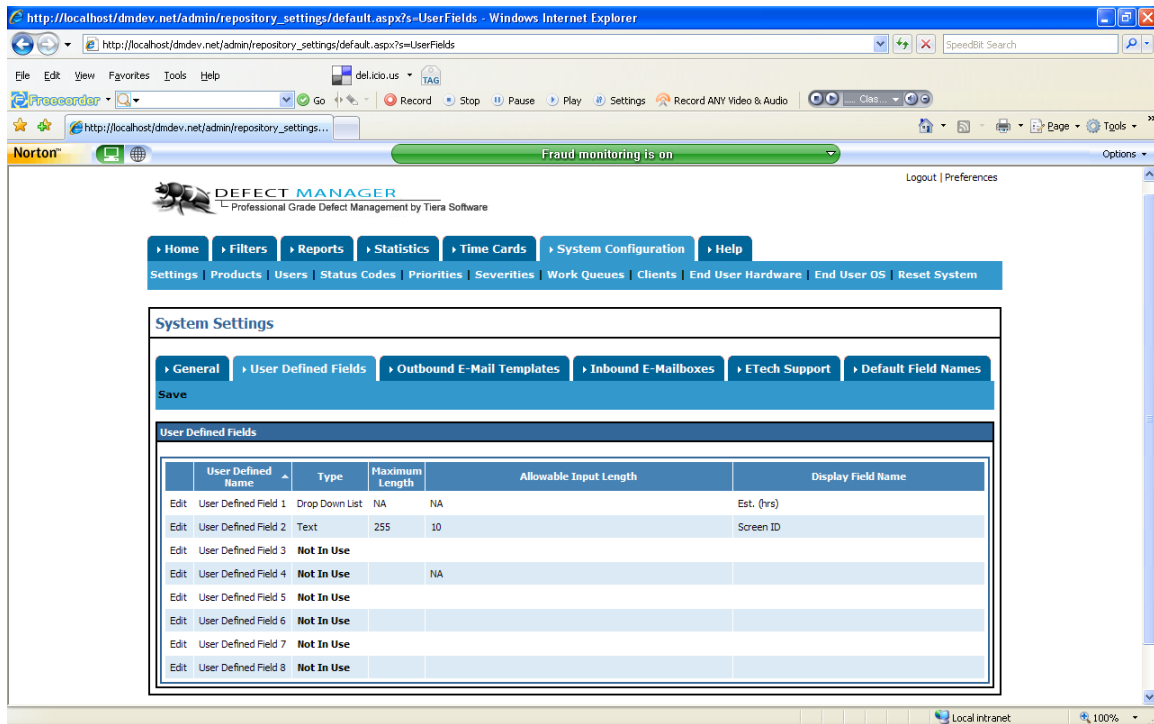


**Figure: IIS Authentication Screen**

In this situation, authuser1 must be defined to the domain (and the password entered in the **Password** field is correct for domain user authuser1) and authuser1 must be defined as a Defect Manager user to be granted access to the system. If access is granted, the user will be automatically logged into Defect Manager and the Defect Manager Web login screen will be bypassed.

### ***User-Defined Fields***

User-Defined Fields are configured using the window as shown below.

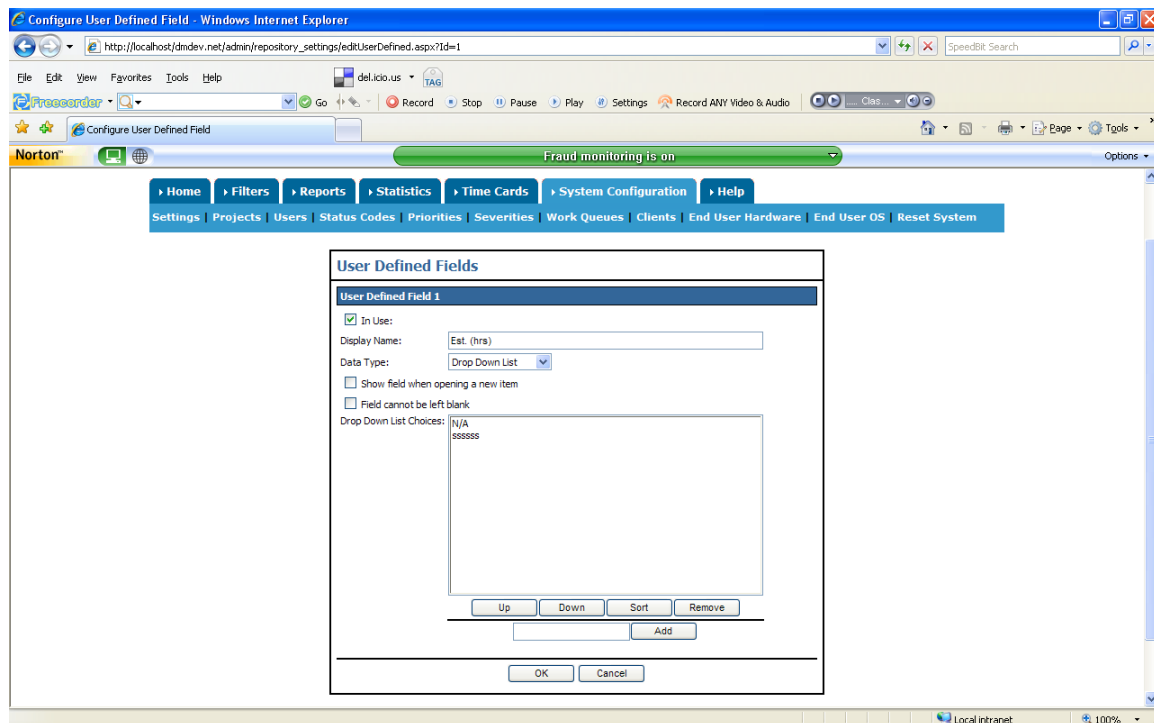


**Figure: User-Defined Fields**

In Defect Manager you can have up to eight (8) user-defined fields. The system supports the following field types:

- **Text Field** - Limited to a text-length of 255 bytes
- **Drop-down List Field** - An unlimited list of choices the user can select from
- **Integer Field** – Limited to a maximum length of 9
- **Long Text Field** – Limited to a maximum text-length of 1500 bytes.

To add/edit a **User Defined Field**, click on the **Edit** link. You will be shown the following form:



**Figure: Edit a User-Defined Field**

Depending on the user defined field type, you can specify the following properties

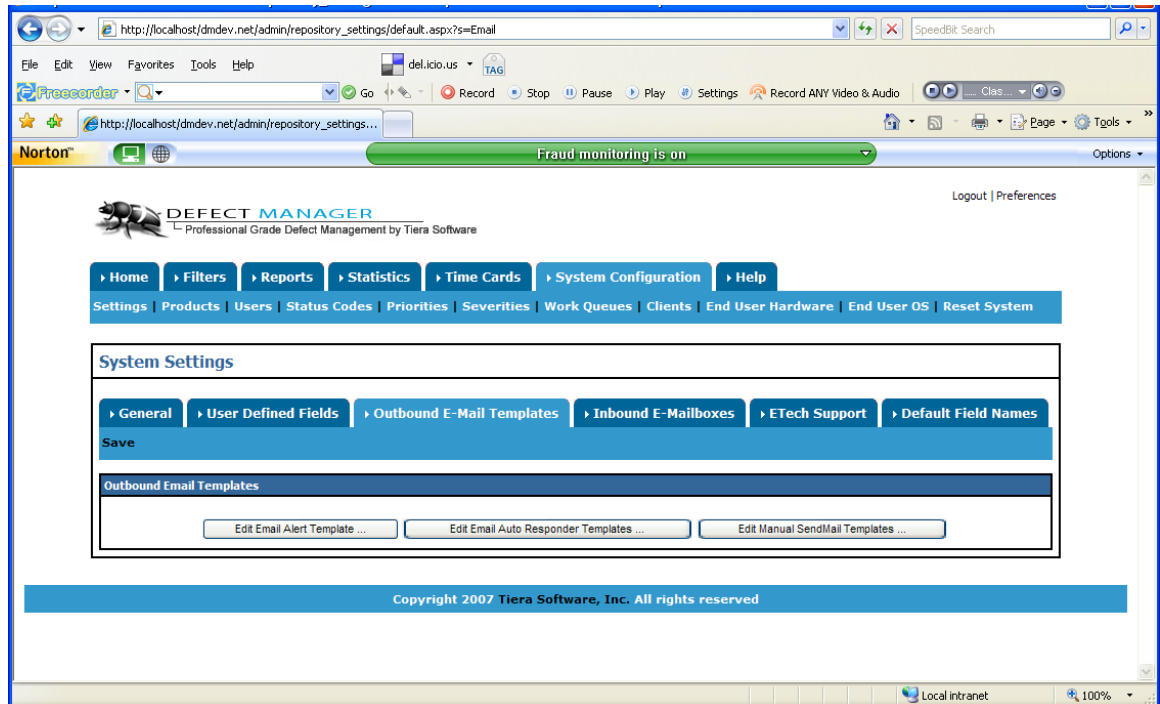
- **In Use** – This field is currently being used in the system
- **Display Name** – A user-defined field is not activated unless you specify a name field. The name field is a caption displayed next to the enterable user defined field's value.
- **Data Type** – The type of field
- **Show when opening a new defect** – Show the user-defined field when logging a new issue.
- **Mandatory data entry required** – This user-defined field cannot be left blank.
- **Drop Down Choices** - Enter the values for a drop-down list field. This field is only displayed for drop-down list fields. The top value is the default value.
- **Default** – The default data value for the user defined field. This entry is not valid for the drop-down list fields since the default value for the each drop-down selection list is the first entry in a drop-down list.
- **Maximum Field Size** – The maximum number of bytes that can be entered for the user- defined field. This entry is not shown for drop-down list fields.

### ***Outbound Email Settings***

Defect Manager supports email alerts and e-mail auto-responders. E-mail alerts notify Defect Manager Users when certain conditions of an issue change. E-mail auto-

responders are used to send e-mail letters to your clients when the report a new issue or when the issue is resolved. E-mail alerts and E-mail auto-responders are completely configurable.

The *Outbound E-Mail Templates* section is shown below:



**Figure: Outbound E-Mail Templates Section**

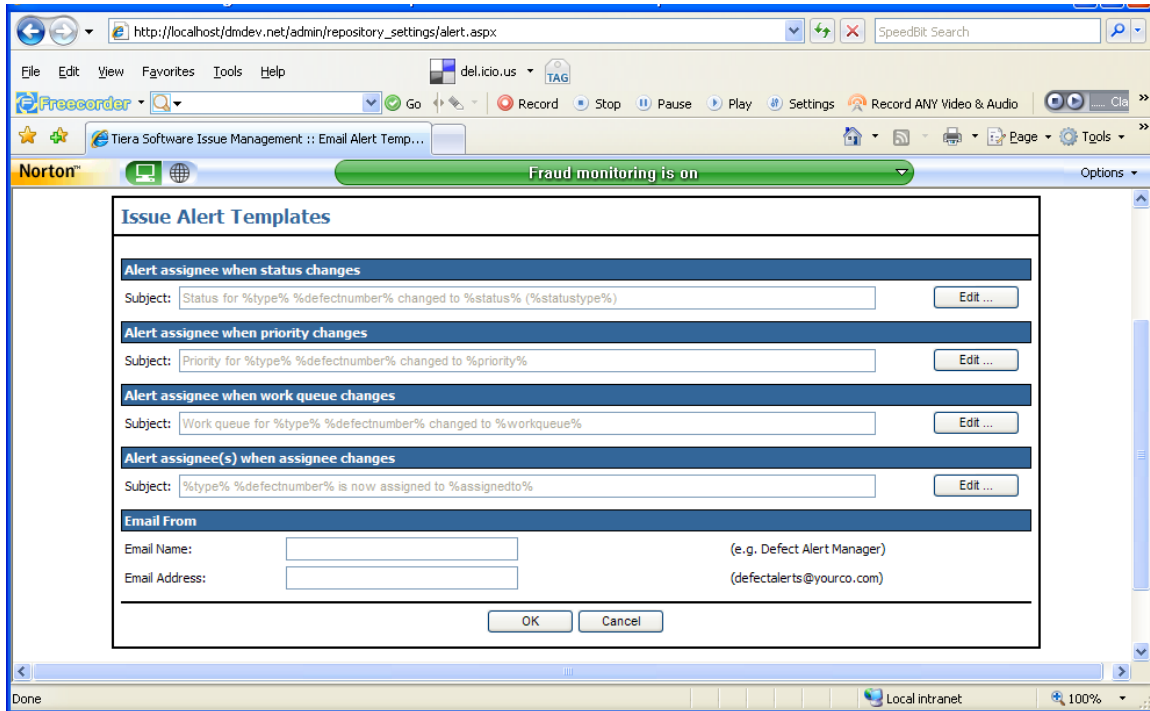
E-mail alerts, e-mail auto-responders, and manual e-mails are completely customizable by your company. You can specify both the subject and the body of e-mails that will be sent out.

Using the *E-mail Template Builder* you can build e-mail templates that will be used by the system when sending out e-mails. You create templates by adding your fixed text, plus inserting issue related data-field place holders such as: issue id, open date, close date, summary, due date, etc. into the template. The data-field place holders get replaced in “real-time:” with actual data values for the current issue item when the e-mail gets created.

- To configure and edit e-mail alerts, press the **Edit Email Alert Templates** button.
- To configure and edit e-mail auto-responder templates, press the **Edit Email Auto Responder Templates** button.
- To configure manual send mail templates, press the **Edit Manual Send Mail Templates** button.

**Note: By default all e-mails are sent in text. If you want to send HTML formatted e-mails you need to set the E-mail Format parameter to HTML in the [General Settings Section](#).**

## E-mail Alert Templates



**Figure: E-Mail Alert Templates**

*E-mail alert templates* are messages that are sent to users when certain issue-item fields change (e.g., status, work queue, priority or assignee) as configured by the system Configuration Manager to receive these e-mail alerts. See section [Configuring Users](#) for more information on configuring e-mail communications with users.

You can configure the **Subject** and the **Message** of the automatic e-mail alerts by pressing the **Edit** button next to each alert on this window. When you press the **Edit** button, the *E-mail Message Editor* window will be displayed.

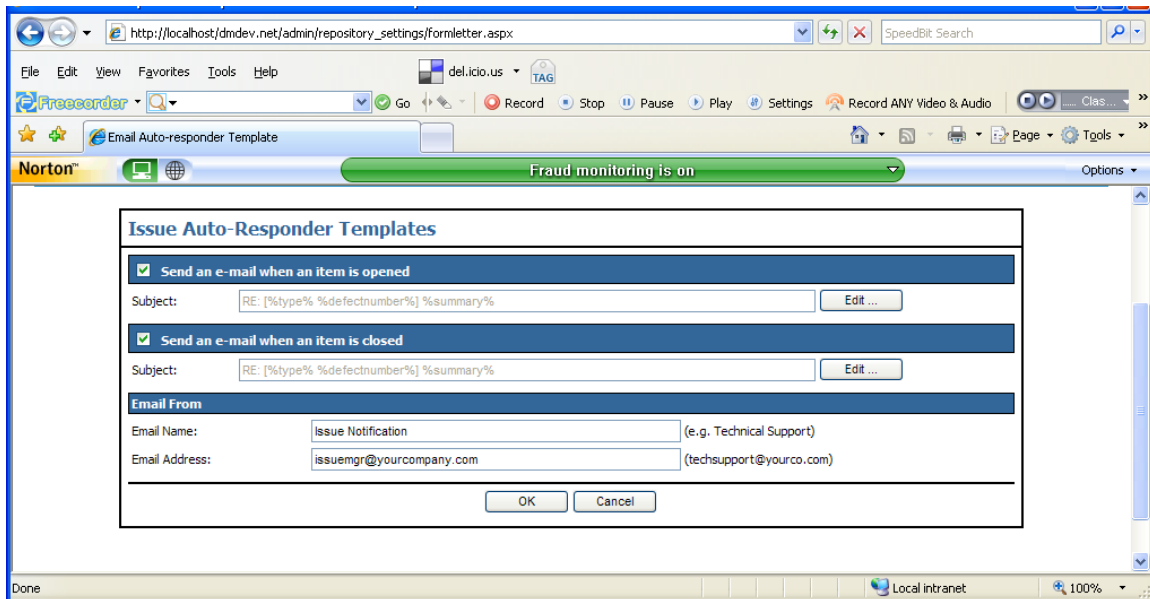
The *E-mail Message Editor* will let you modify both the subject and the message body of the e-mail message. You can learn more about the E-mail Message Builder by looking at the section [E-mail Message Builder](#).

When e-mails alerts are e-mailed, they need to be sent from somebody. To do this you have to specify the following fields.

- **Email name** – This is a friendly name that accompanies an e-mail address. For example, Defect Manager Alert Messenger.

- **Email address** -- This is the actual e-mail address. For example, dmal@yourcompany.com. This e-mail address must be a valid address and allowable for the **SMTP Server Name** that you specified in section [General Settings Section](#).

## E-mail Auto Responders Templates



**Figure: Edit Form Letter**

E-mail auto-responders can be sent automatically to your clients when an issue or defect's primary status changes – such as when defect is opened or closed.

You can configure the **Subject** and the **Message** portions of the automatic auto-responders by pressing the *Edit* button next to each form letter.

When you press the **Edit** button, the e-mail message editor window will be displayed. The e-mail message editor will let you modify both the subject and the message body of the e-mail message. You can learn more about the E-mail Message Builder by looking at section [E-mail Message Builder](#).

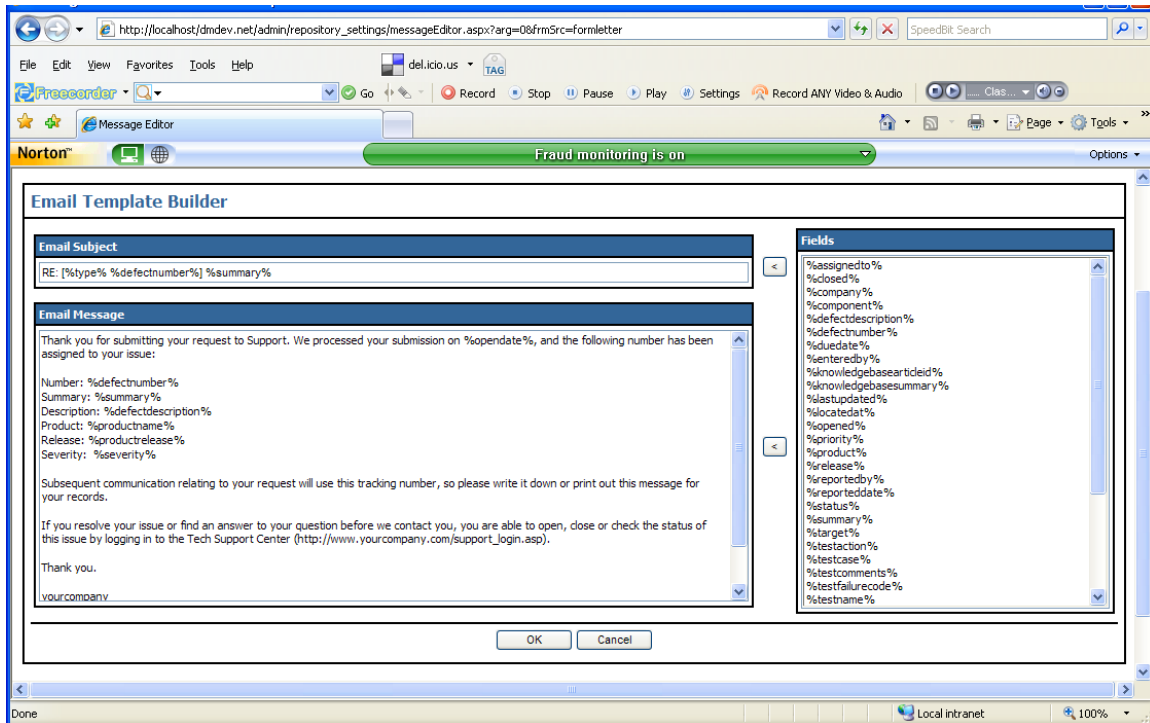
When an e-mail form letter gets e-mailed, it needs to be sent from somebody. You must specify the following fields.

- **Email name** – This is a friendly name that accompanies an e-mail address. For example, “Defect Manager Letter Messenger”.
- **Email address** -- This is the actual e-mail address. For example, dmal@yourcompany.com. This e-mail address must be a valid address and allowable for the **SMTP Server Name** that you specified in section [E-mail Settings](#).

## ***E-mail Message Builder***

The E-mail Message Builder helps you customize e-mails that are generated by the system. Defect Manager E-mails are always based around a particular issue-defect item.

As you tailor the e-mail subject and message, you can use **Place-Holder Fields** for the actual issue data fields. When Defect Manager constructs the e-mail in real-time, the place-holders fields are replaced by the actual data values in the issue that is being processed.



**Figure: The Template Editor for E-mail Subject and Message Elements**

The e-mail message builder lets you insert **Place-Holder Fields** into the message body and subject.

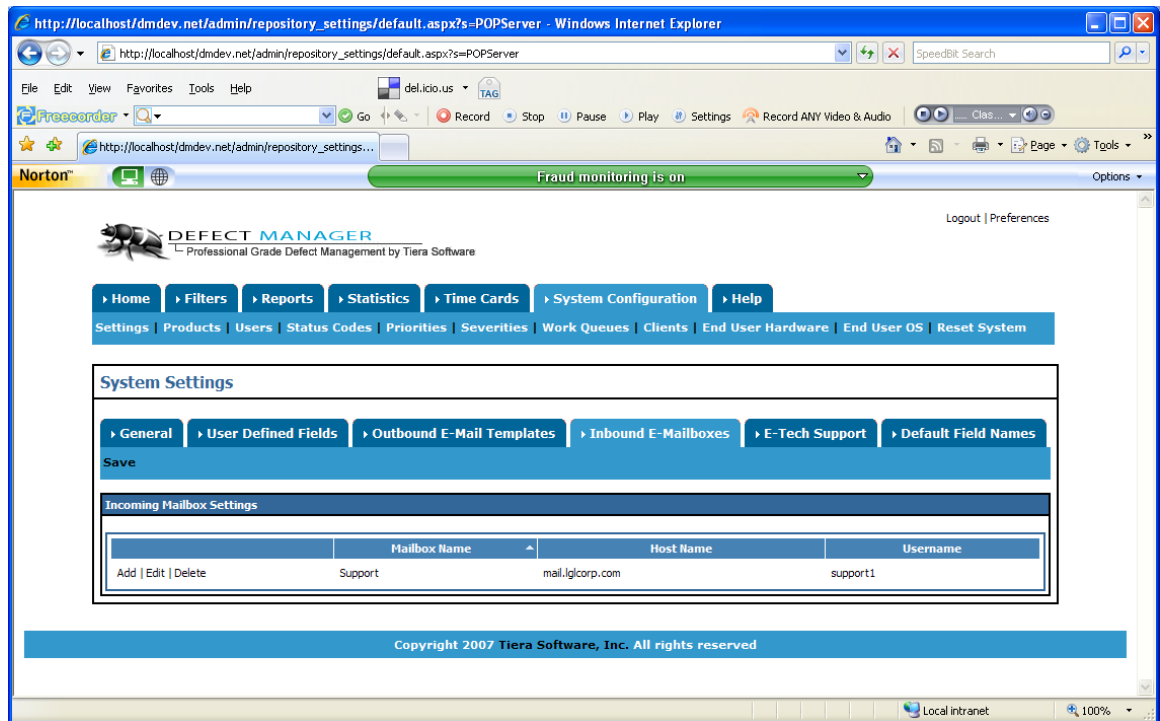
To create a new e-mail message, you would follow these steps:

- (1) Compose your subject and message body using any text editor tool you prefer. Use actual data field values in the text as if you are creating a specific-mail. Copy the ASCII-text file to the clip board.
- (2) After opening the E-mail Message Builder window, paste the text-message file that you composed in step (1).
- (3) Replace all static fields in the subject and body with the with the place-holder fields.
- (4) Click the **OK** button.

## ***Inbound Mailboxes***

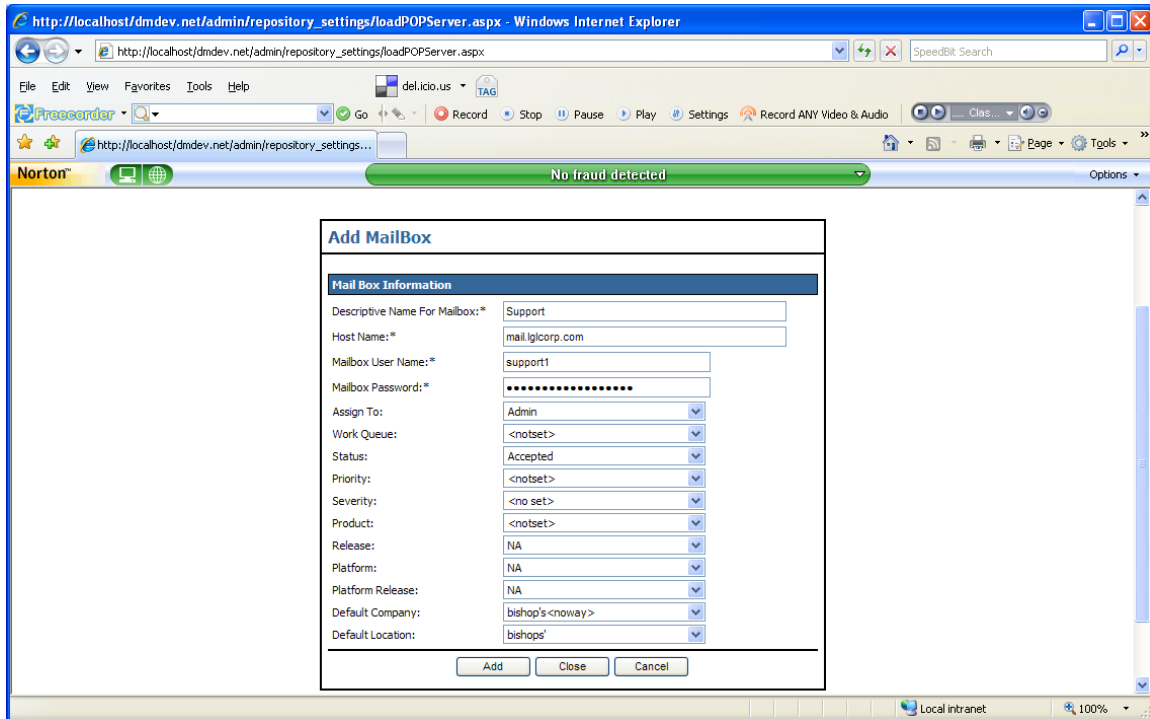
Defect Manager can read email boxes and automatically enter those emails into the system. The system will locate the contact in the system that the e-mail came from and log the issue under that contacts name. If the contact doesn't exist, then the contact is added to a default company and location that you have specified for the mail box.

The ***Inbound Mailboxes*** folder is shown below:



**Figure: Inbound Mailbox Folder**

There isn't any limit on the number of mailboxes that you can define. To add a new mailbox select the **Add** link and you will be shown the following:



**Figure: Add Inbound Mailbox**

Enter the appropriate parameters for the mailbox and press the **Add** button.

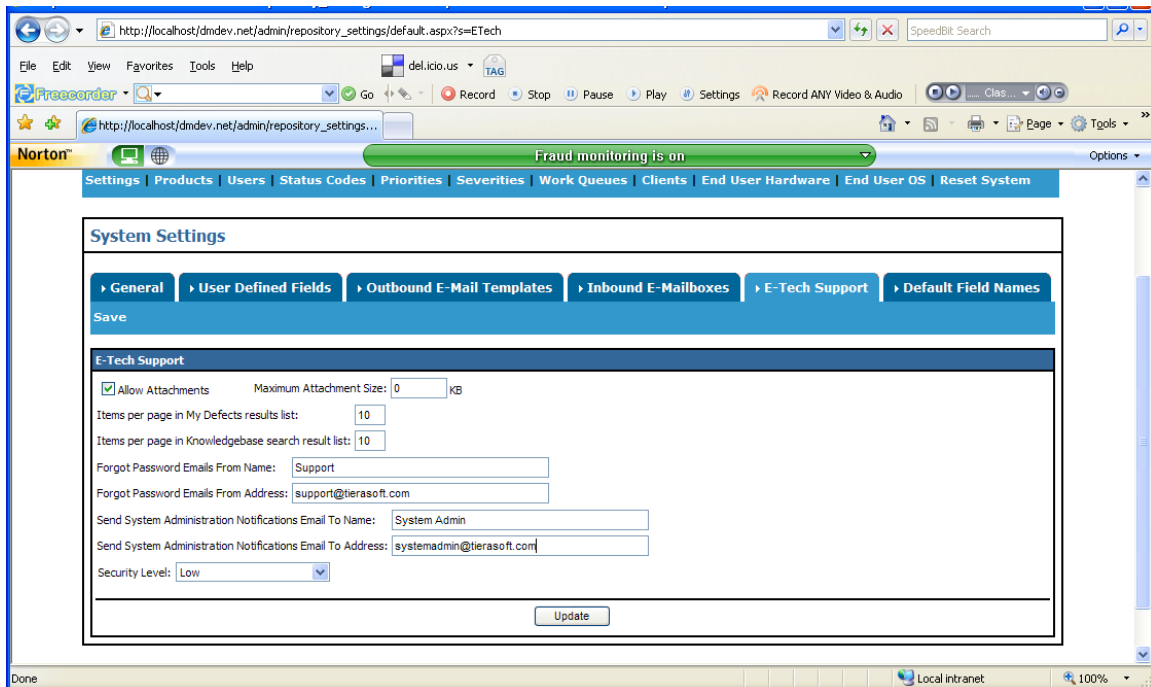
### ***E-Tech Support Settings***

Defect Manager ***E-Tech Support*** is distributed as a set of ASP .net pages.

We actually give you an entire “Out of the Box” customer-support section for your company’s website. All you need to do is add your company’s header, footer and graphics and you are ready to better support your clients.

You may use these pages as they exist, or you can easily tailor them to match your website’s look and feel. If your company is not familiar with ASP .net, we can tailor our ASP .net to look just like your site.

There are many ways you can customize E-Tech Support to suit the needs of your company. When you select the E-Tech Support tab you will see the following window:



**Figure: E-Tech Support Section**

When your clients report new defects from E-Tech Support, you can specify how these defects are logged into Defect Manager. The available choices are as follows:

- **Allow Attachments** – Check this checkbox if you want your users to be able to attach documents to the defect when they open.

It is good practice to allow your users to attach screen shots of errors and other information that is pertinent to the defect they are reporting.

If you allow attachments, you can limit the largest attachment you are willing to allow someone to upload. If you want to specify a maximum size, enter a value into the **Maximum Attachment Size** field. When you specify this field, you specify the maximum attachment size in kilobytes (kb), not the actual number of bytes. By default this field is blank, which means you are not restricting the maximum attachment size.

When your clients are reviewing their defects or searching for defects in the knowledgebase, Defect Manager will display a list of defects that meet the criteria. You can specify the number of defects that will be displayed on each page. For most users the defaults will be sufficient, but for some clients you might want to provide more or less information on each screen.

To change these options, you can set the parameters below.

- **Items per page in My Defects results list** – This is the number of defect that will be displayed on a single page when reviewing my defects.
- **Items per page in Knowledgebase search result list** – This is the number of knowledge base search items that will be displayed on a single page after querying the knowledgebase.

When users forget their password, they can request to have their password e-mailed to them. You need to specify the user e-mail name and user e-mail address where these e-mail messages will come from.

- **Forgot Password Email From Name** – Specify a friendly name for the source name such as Support.
- **Forgot Password Email From Address** – Specify a valid e-mail address for the source address such as [support@abc.com](mailto:support@abc.com)

When certain actions occur (such as one of your client registering for E-Tech Support) an e-mail can be sent to an individual in our organization to take action. If you specify the e-mail name and e-mail address, this person will be notified when the event occurs.

- **Send System Administration Notifications Email To Name** – Specify a friendly name for the source name such as Support.
- **Send System Administration Notifications Email To Address** – Specify a valid e-mail address for the source address such as [support@abc.com](mailto:support@abc.com)

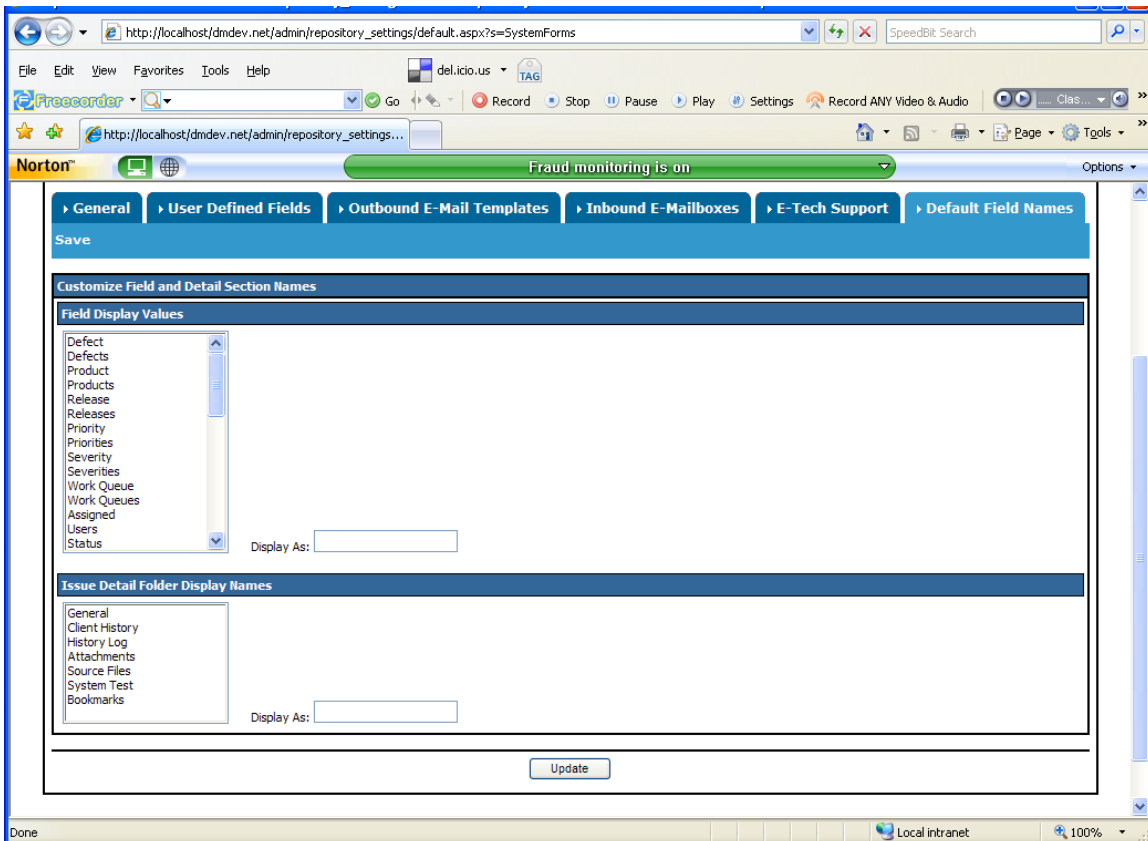
## Security Level (Web)

Defect Manager E-Tech Support provides three distinct levels of security when contacts login to Defect Manager E-Tech Support. These three levels are as **Low**, **Medium** and **High**. Each security level handles the authentication of contacts in a different way. These security levels are described in the [General Settings Section](#).

**Note: You can use https for Defect Manager E-Tech Support. This will ensure that all the data that is viewed in the browser is encrypted.**

## Default Field Names Section

Not all businesses refer to similar things with the same name. For instance, some companies use the name ‘defect’ other s use ‘bug’ to represent an problem or error in their systems. Some businesses sell products, other business, like consulting companies, may sell project based services. To accommodate this need, Defect Manager allows the changing of field names to meet your requirements. The *Default Field Name Section* allows you to do just that as shown below.



**Figure: Default Field Name Section**

To change a field name, just click on the standard Defect Manager name in field list. The **Display As** field will show the current display value for that field. Change this value to whatever you require.

The Defect Manager **Issue Detail** window is comprised of a series of folders, such as **Overview, History, Client History**, etc.

You can change the folder names in the same way that you change the field names. Select the folder you want to change, and modify its value in the **Display As** field.

Click the **Update** button when you have finished making all your changes.

## Configuring Clients

Your clients are the companies or other organizations in your company with which you do business.

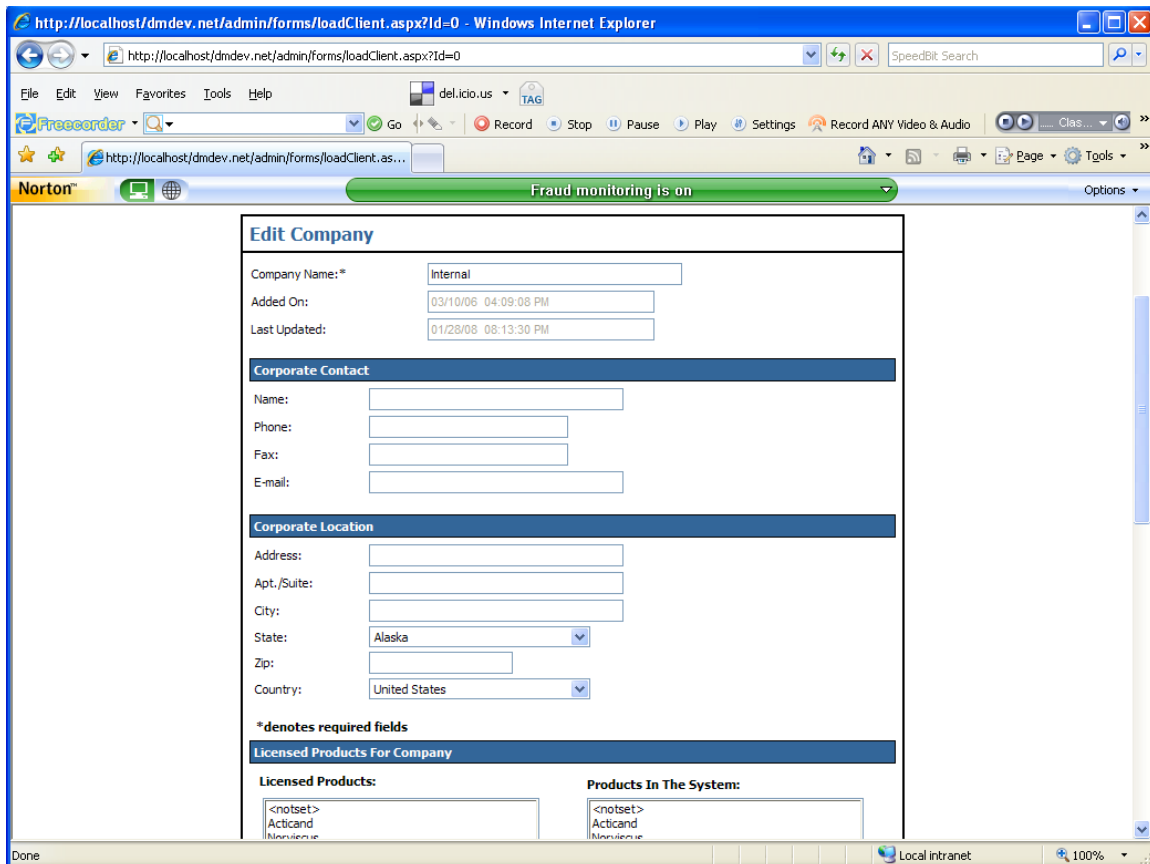
Companies can have many locations in which they use your products. Some locations may be licensed for certain products and other locations for different products. Each location has a list of individuals, called **Contacts**, which you support.

With Defect Manager, contacts from different locations within a company may report defects and issues, make suggestions, request enhancements, ask questions as well as request service or support.

If your company does not want to break down your clients by location, just create a single location, and put all the contacts under a single location.

### *Company*

When you add or modify a company client, you will see the following window as shown below.



The screenshot shows a web browser window displaying the 'Edit Company' form. The browser address bar shows 'http://localhost/dmdev.net/admin/forms/loadClient.aspx?Id=0'. The form is titled 'Edit Company' and contains the following sections:

- Company Information:**
  - Company Name: \* Internal
  - Added On: 03/10/06 04:09:08 PM
  - Last Updated: 01/28/08 08:13:30 PM
- Corporate Contact:**
  - Name: [Text Box]
  - Phone: [Text Box]
  - Fax: [Text Box]
  - E-mail: [Text Box]
- Corporate Location:**
  - Address: [Text Box]
  - Apt./Suite: [Text Box]
  - City: [Text Box]
  - State: Alaska (Dropdown)
  - Zip: [Text Box]
  - Country: United States (Dropdown)
- Licensed Products For Company:**
  - Licensed Products: [Text Box containing '<notset> Acticand Non-dene']
  - Products In The System: [Text Box containing '<notset> Acticand Non-dene']

A note at the bottom of the form states: '\*denotes required fields'. The browser status bar shows 'Done' and 'Local intranet'.

**Figure: Company Settings**

Below are the descriptions of the fields on the Company tab that need to be entered when modifying an existing or adding a new client:

- **Company ID** – The unique database identification of this company. This field is automatically generated by the system when a new company is added.
- **Company Name** – The company name.
- **Password** – Used to verify a user for a particular company when they register from the World Wide Web. When adding a new company, a randomly generated password will be created for you. You can change it if you like.
- **Added On** - The date this company was added to the repository.
- **Last Updated** – The date this company information was last updated.
- **Name** – Corporate contact name.
- **Phone** – Corporate contact phone number.
- **Fax** – Corporate fax number.
- **E-mail** – E-mail of this contact.
- **Address 1** – Company address.

- **Address 2** – Additional address information. For example, this could be a suite number.
- **State** – Company state.
- **Zip** – Company zip code.
- **Country** – The country this company resides.
- **Additional Company Info** – Pertinent information related to this company such as billing codes, special requirements, etc.
- **Service Level Agreement** – The Service Level Agreement for this company.

After making your changes press the **Add** or **Update** button to save your changes.

Press the **Add Location** button to add a new location for this company.

Press the **Delete** button to delete the company.

### **Licensed Products**

For many companies, hardware or software products/projects are the things being supported. No matter whether they manufacture or sell the products/projects, or if they support the products they have purchased and installed, Defect Manager can help them track and resolve issues as they are reported.

For other companies, the entries on the Products Tab may be projects and tasks, business process elements, or service offerings of the different types that they are tracking and managing with Defect Manager. Client users (contacts) using the E-tech Support interface can only report items and search the knowledgebase for issues for products/projects that are defined for them. In this way, you can limit certain contacts (by company) from seeing other products/projects that you are supporting with Defect Manager for other companies. This list of available products is derived from the products that you defined to the system. See the section: [Configuring Products](#).

For example:

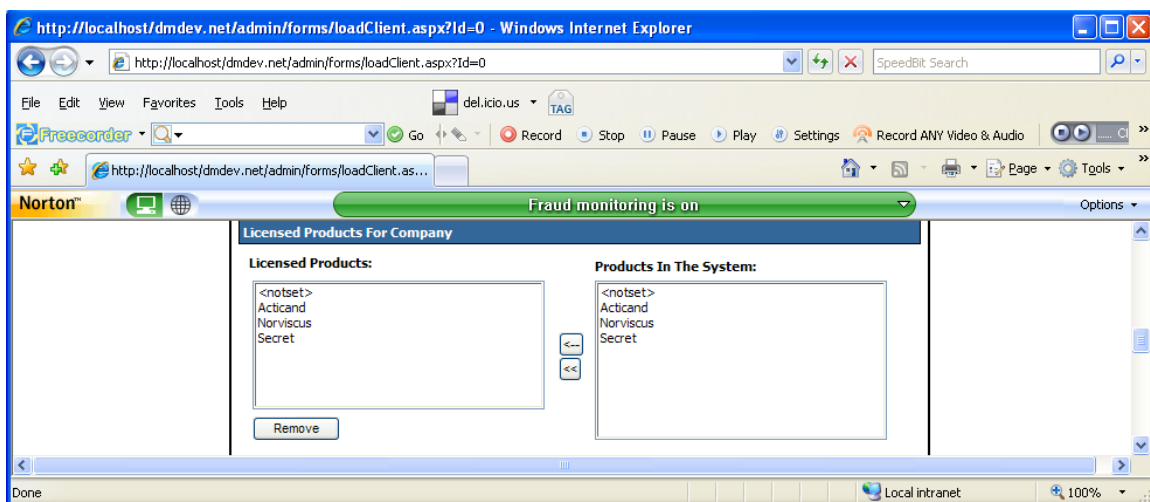
- If you are a **software company**, the **Products section** will contain the list of the software products that each of your clients has licensed.
- If you are an **information technology department**, the **Products section** will contain the list of purchased and installed hardware and software products that you must support. This can be internal as well as external products and services.
- If you are a **consulting company**, this **Products section** may contain a list of projects your company is working on for this client. Depending on the nature of your consulting engagement, your product list might contain a full range of products, projects, processes and services.
- If you are a **medical company** conducting product tests and pilot programs, you may use the **Products section** to list medical products, medical tests identifiers or

pilot program names since these are the “products” you are tracking and supporting.

- If you are **managing one or many projects**, your project plan and updates to project progress does not provide the whole solution to project tracking and effective management. An interactive system for reporting, tracking and resolving project issues and changes, such as Defect Manager provides, provides a powerful and complementary tool. Defect Manager can help make the project plan happen by collecting and reporting accurate and complete operational information needed to maintain and update your project plans.
- When a company uses the **E-Tech Support** interface to report issues, E-Tech Support users will only be able to see the products that are listed on the **Licensed Products** list.

As you can see, the nature of the “products” that you list can be adapted to fit your organization’s specific needs.

To configure the licensed products for a company, use the fields below.



**Figure: Licensed Products for the “Current” Company**

The products that are configured on the **Licensed Products** are related to the **current** company that are adding or viewing.

There are two fields that let you define the licensed products. They are described below:

- **Licensed Products** – This is the list of products that this company is licensed to use or “authorized” in whatever sense that is appropriate to your line of business. These are the products that you can associate with the current customer

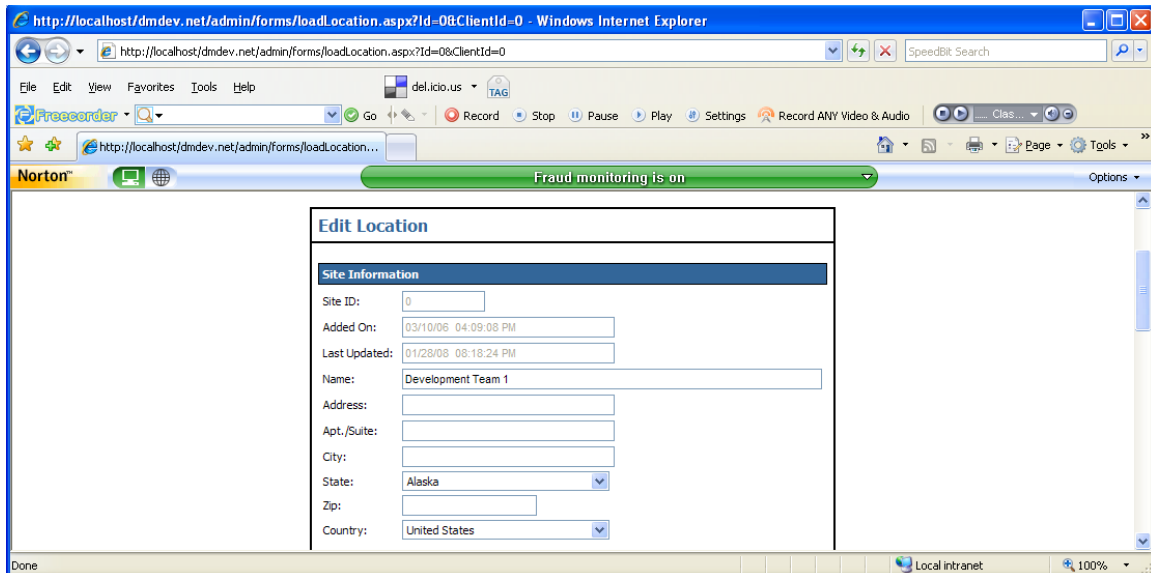
- **Products In The System** – This is the list of active product that is available in the system for you to select from as you establish the “licensed/authorized products” for each client company.

You can use the selection (←) button to add one or more selected products from the **Products In The System** list to the **Licensed Products** list. You can also use the select-all (<<) button to add all of the products in the **Products In The System** list to the **Licensed Products** list for this company.

To remove products from the **Licensed Products** list, select the product in the list and press the **Remove** button.

### *Client Locations and Sites*

When you add or modify a client location or site, you will see the following window.



The screenshot shows a web browser window titled "Edit Location" with the following form fields:

- Site ID:
- Added On:
- Last Updated:
- Name:
- Address:
- Apt./Suite:
- City:
- State:
- Zip:
- Country:

**Figure: Client Location – Maintenance Window**

Keep in mind that a client site may a specific location of an organization within another company or it may be a location of an organization within your own company that you support. Your customers and the locations you support may be both external and internal.

The following are the fields that need to be entered when adding a location site for a client company.

- **Site ID** – The unique database identification of this location/site. This field is automatically generated by the system.

- **Added On** - The date this company was added to the repository.
- **Last Updated** – The date this company information was last updated.
- **Name** – The descriptive name for this location.
- **Address** – The address of this location. This field is used to identify the site location by name. It can be a street address, web site URL, department name, etc.
- **Apt. /Suite** – This field is used to add additional information about the address of the site.
- **State** – This locations state.
- **Zip** – The zip code for this location.
- **Country** --The country this location resides in.
- **Additional Company Info** – Pertinent information related to this client location such as billing codes, special requirements, etc.
- **Service Level Agreement** – The Service Level Agreement for this client location.

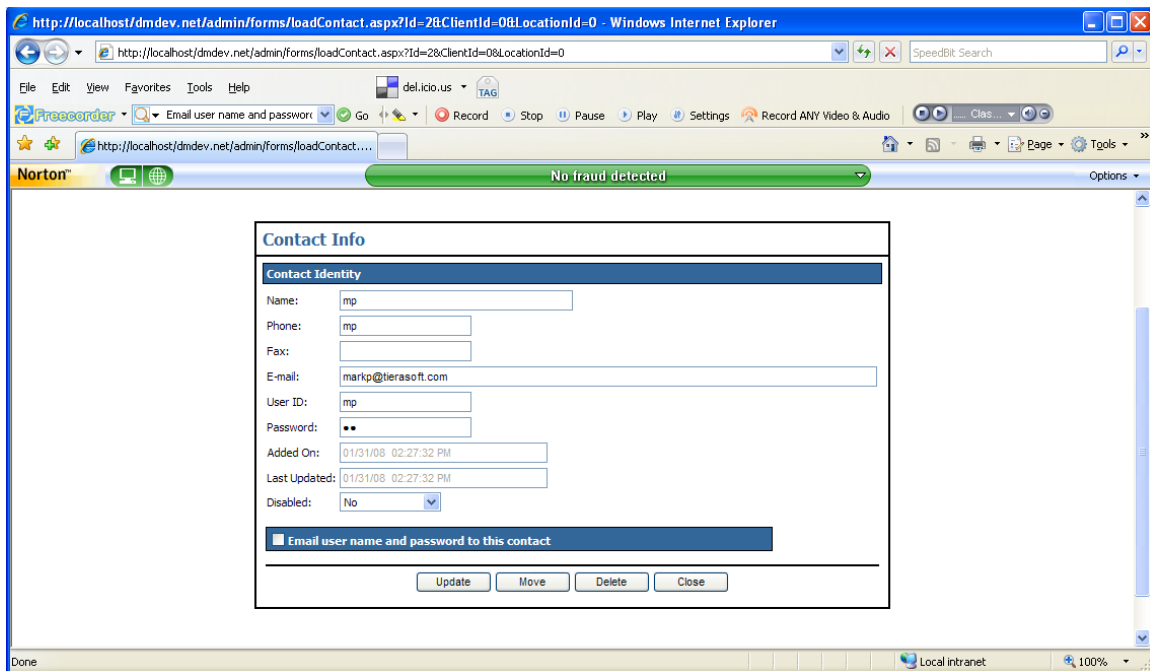
After making your changes press the **Add** or **Update** button to save your changes.

Press the **Add Contact** button to add a new contact for this location.

Press the **Delete** button to delete the company.

## Client Contacts

When you add or modify a client contact, you will see the following window.



The screenshot shows a web browser window with the URL `http://localhost/dmdev.net/admin/forms/loadContact.aspx?id=2&ClientId=0&LocationId=0`. The browser has a Norton security bar at the top indicating 'No fraud detected'. The main content area displays a 'Contact Info' form with the following fields:

- Contact Identity** (Section Header)
- Name:
- Phone:
- Fax:
- E-mail:
- User ID:
- Password:
- Added On:
- Last Updated:
- Disabled:

At the bottom of the form, there is a checkbox labeled 'Email user name and password to this contact' which is checked. Below the checkbox are four buttons: 'Update', 'Move', 'Delete', and 'Close'.

## Figure: Modify Client Contact Window

Below are the descriptions of the enterable fields that need to be entered when adding a contact site to a particular site location.

- **Contact ID** – The unique database identification of this contact. This field is automatically generated by the system.
- **Name** – The name of this contact.
- **Phone** – Contact phone number.
- **Fax** – Contact fax number.
- **E-mail** – The e-mail of this contact. .
- **User ID** – The user identification for this contact. This contact will need this information to login to the E-Tech Support System.
- **Password** – The password for this contact. This contact will need this information to login to the E-Tech Support System. When adding a new contact, a randomly generated password will be created for you. You can change it, if you like.
- **Add On** - The date this company was added to the repository.
- **Last Updated** – The date this company information was last updated.
- **Disabled** - Select **Yes** or **No**. When a contact is disabled they are not permitted to use the E-Tech Support system. Users automatically get disabled when they have exceeded the maximum number of failed login attempts trying to login to E-Tech Support.
- **Email user name and password to this contact** – Check this box if you want to send this user their Username and Password to access the e-Tech Support System.

After making your changes press the **Add** or **Update** button to save your changes.

Press the **Move** button to move this contact to another location and/or company.

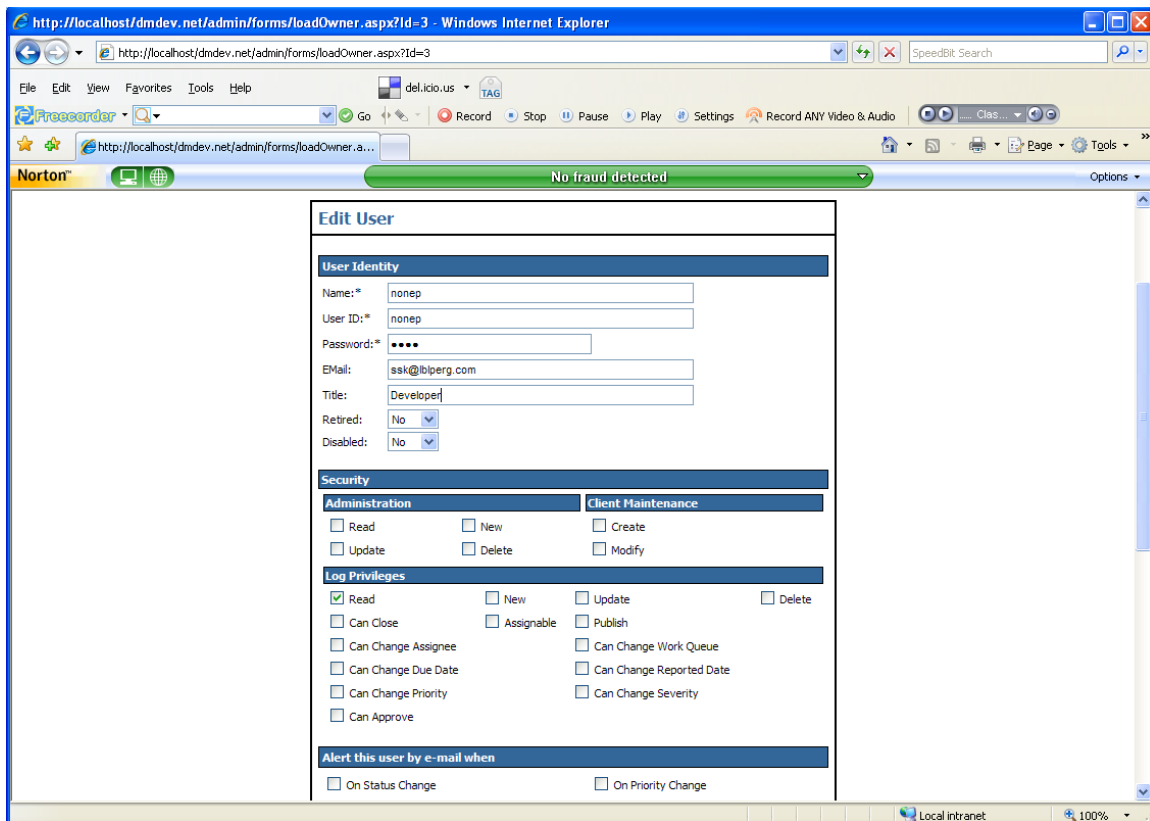
Press the **Delete** button to delete the contact.

## Configuring Users

Users of Defect Manager often have different skill sets and responsibilities for working on reported issues and defects. Users are also referred to as Owners since they may be assigned (i.e., “Own”) the responsibility to process an issue or defect.

Owners are individuals that work on issues and defects such as project managers, developers, technical support, QA, graphic artists, web designers, technical writers, etc. All owners have certain security rights as well. This allows you to only permit certain owners to do certain things within the Defect Manager system.

When you add or modify user information, the following window will be displayed for you to identify the user and his/her properties as well as the user's security permissions.



The screenshot shows a web browser window titled "http://localhost/dmdev.net/admin/forms/loadOwner.aspx?id=3 - Windows Internet Explorer". The browser's address bar shows the URL. The page content is titled "Edit User" and is divided into several sections:

- User Identity:**
  - Name: \* nonep
  - User ID: \* nonep
  - Password: \* [masked]
  - EMail: ssk@biperg.com
  - Title: Developer
  - Retired: No
  - Disabled: No
- Security:**
  - Administration:**
    - Read
    - Update
  - Client Maintenance:**
    - New
    - Create
    - Delete
    - Modify
- Log Privileges:**
  - Read
  - Can Close
  - Can Change Assignee
  - Can Change Due Date
  - Can Change Priority
  - Can Approve
  - New
  - Assignable
  - Update
  - Publish
  - Can Change Work Queue
  - Can Change Reported Date
  - Can Change Severity
  - Delete
- Alert this user by e-mail when:**
  - On Status Change
  - On Priority Change

**Figure: Modify User Configuration Window**

Below are the descriptions of each field in the *Modify User* window.

- **Name** – The name of this user.
- **User Name** -- The name that will be used by this user to login to the system.
- **Password** – The password for this user. When adding a new user, a randomly generated password will be created for you. You can change it if you like.
- **E-mail** – The e-mail for this user.
- **Title** – This user’s title. This is not currently used, but it will be in the future.
- **Retired** – Select Yes or No. A retired user is someone who no longer permitted to use the Defect Manager system.
- **Disabled** - Select **Yes** or **No**. When a user is disabled they are not permitted to use the Defect Manager system. Users automatically get disabled when they have exceeded the maximum number of failed login attempts.
- **Administration Read** – Check this item, if this user is allowed to access the **System Configuration** folder
- **Administration Create** – Check this item, if this user is allowed to add new items such as clients, queues, etc.,
- **Administration Modify** – Check this item, if this user is allowed to make modifications to existing items such as clients, queues, etc.
- **Administration Delete** – Check this item, if this user is allowed to make delete existing items such as clients, queues, etc
- **Client Create** – Check this item, if this user is allowed to add new clients, locations or contacts to this system when logging new defects in the Defect Manager Log. This might be a person that takes defect reports over the phone, or reviews closed issue items, but this setting is not appropriate for a technical user.
- **Client Modify** – Check this item, if this user is allowed to change information related to companies, locations and contacts when using the Defect Manager Log.
- **Log Read** – Check this item, if this user is allowed to use the Defect Manager Log and view issues.
- **Log Publishable** – Check this item, if this user is allowed to publish to the knowledgebase.
- **Log Assignable** – Check this item, if this user can be assigned items. For example, managers are not usually eligible to have items assigned to them, and would not have this item checked.
- **Log New** – Check this item, if this user can open new items.
- **Log Update** – Check this item, if the user can update items.
- **Log Delete** - Check this item, if the user can delete items.
- **Log Can Close** – Check this item, if the user can close items.

- **Can Change Assignee** – Check this item, if the user can change the assignee for an item.
- **Can Change Queue** – Check this item, if the user can change work queue for an item.
- **Can Change Due Date** – Check this item, if the user can change the due date of an item.
- **Can Change Severity** – Check this item, if the user can change the severity of an item.
- **Can Change Priority** – Check this item, if the user can change the priority of an item.
- **Can Change Reported Date** - Check this item, if the user can change the reported date of an item.
- **Can Approve** - Check this item, if the user can change the state of an item from Unapproved to Approved reported date of an item.

#### **“Alert this user by e-mail when”**

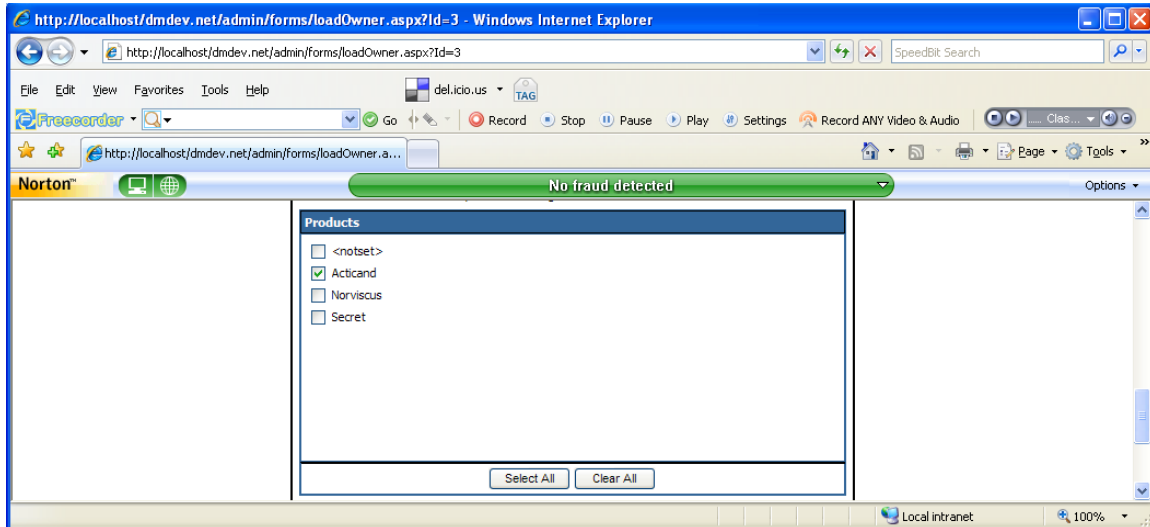
- **On Status Change** – Check this item, if you want the system to send an e-mail notification to this user when anyone has changed the *status* of this user’s defect.-issue item
- **On Work Queue Change** – Check this item, if you want the system to send this user an email notification when anyone has changed the *work queue* assignment for this user’s issue.
- **On Priority Change** – Check this item, if you want the system to send this user an e-mail notification when anyone has changed the *priority* of this user’s issue.
- **On Assignee Changes** – Check this item, if you want the system to send this user an e-mail notification when anyone has *assigned* a defect to this user, or a when a defect is no longer *assigned* to this user.
- **A Note Is Added** – Check this item if you want the system to send this user an e-mail notification when any one has added a note to this defect. The note could be added by a user of Defect Manager or by a client via the E-Tech Support interface.
- **E-mail this user even if they are not the assignee** – Check this item, if you want the system to send an e-mail notification to this user even when they are not the owner of this defect.

This option works in conjunction with the Status Changes, Work Queue Changes, Priority Changes, and Assigned User Changes Options. For instance, if this user wants to be notified every time a work queue is changed for an item, even if they are not assigned to the item, they would check the **Work Queue Changes** option and check this option.

**Note:** Checking this option alone has no effect without checking one of the other options.

### Assigning Users to Projects

If you have chosen to limit access to products on a user by user basis (see the [General Settings Section](#)), then you will need to select the projects for the user as shown below:



**Figure: Assigning Users to Products**

## Configuring Work Queues

Work queues are defined and named to identify different work steps in the issue-defect resolution process. Work queue names can also indicate organizational and technical specialties needed to process work in the queue.

For instance, you may have separate queues for development, testing, documentation, graphics, etc. Issues and defects should be passed to a particular work queue and then assigned to an individual who works on that queue. Individuals that service a particular queue can pick items from the queue, or they can have the issue-defect item assigned to them by management.

Essentially, each individual's workload is driven by his/her assigned work queues and items that may be assigned specifically to them. Defect Manager allows users to view: all queues, specific queues assigned to them as well as the issue items that are specifically assigned to them in work queues.

It is important for management to know what defects individuals are working on now, and what's on their schedule next.

It is also important for management to know the workload by departmental area. For instance, suppose there are twenty items in a development queue and there is only one worker available today to process these items. By reviewing the workload and staffing at each queue, management can recognize queue build-up situations as well as staffing deficiencies in order to re-distribute work assignments and staff allocations (as resources permit) to balance the workload.

Although this seems pretty straightforward, it can be very complex to manage when you have hundreds or even thousands of issues/defects reported for many different products by many clients with diverse needs.

## Configuring Severity Codes

When defects are reported, you should establish a severity code for them. The severity code that you set is usually based on rules defined by your company and what your clients and your company have agreed upon. A severity code is an effective way to quickly communicate the urgency of a reported issue or defect.

**Severity** – Processing severity for an issue item is defined in terms of code names that indicate the severity of a defect or importance of an issue. Severity code definitions consist of a severity name and a numerical severity sort value. The numeric severity value allows issue items to be ranked in the order of its severity with zero (0) being the highest severity with the greatest urgency for resolution.

Default severity definitions are shown below which can be customized by using the Defect Manager *Configuration Manager* program to meet your organizations needs.

Severity Name	Severity Sort Value
System Down	0
System Crash	100
Loss of Functionality	200
Minor Issue	300

***Note:** By leaving gaps in the numerical severity sort values assigned, it is possible at a later time to create new levels of severity within the existing severity assignments.*

Very often maintenance contracts for software products stipulate that certain defect classifications (system down, serious defect, etc.) have a certain severity and based on that severity there is timeframe in which these defects must be rectified. So it is important to keep an eye on the highest-severity issues and defects to make sure they are assigned and corrected within a timeframe that was contractually agreed upon.

Defect Manager lets you create as many severities as you want. However, there is an outer limit of 64,000. Typically, you probably will need less than a dozen, but every business is different. When you add a severity, you will assign a descriptive severity code and a severity-level number. This number denotes the relative severity of this code. Zero is the highest severity and most urgent numerical severity value.

## Configuring Priority Codes

When defects are reported, you should establish a priority code for them. The priority that you set is usually based on rules defined by your company and what your clients and your company have agreed upon. A priority code is an effective way to quickly communicate the relative importance and urgency of a reported issue or defect for a given severity.

**Priority** – Processing priority for an issue item is defined in terms of code names that indicate the priority of a defect or importance of an issue. Priority code definitions consist of a priority name and a numerical priority sort value. The numeric priority sort value allows issue items to be ranked in the order of its priority with zero (0) being the highest priority with the greatest urgency for resolution.

Default priority definitions are shown below which can be customized by using the Defect Manager *Configuration Manager* program to meet your organizations needs.

Priority Name	Priority Sort Value
1	0
2	100
3	200
4	300

*Note: By leaving gaps in the numerical priority values assigned, it is possible at a later time to create new levels of priority within the existing priority assignments.*

Defect Manager lets you create as many priorities as you want. However, there is an outer limit of 64,000. Typically, you probably will need less than a dozen, but every business is different. When you add a priority, you will assign a descriptive priority code and a priority-level number. This number denotes the relative priority of this code. Zero is the highest priority and most urgent numerical priority value.

## Configuring Status Codes

With Defect Manager, you can create many status codes to reflect the state of an issue or defect. Status codes give management the ability to quickly discern the root causes and nature of issues and defects, without having to manually review all the defects items that have been reported.

Also, different status codes can mean different things depending on the work queues an item is currently in. Likewise, certain status codes may only be valid while the issue item is in certain queues.

There are four (4) fixed primary-status codes that are listed below. You can define as many secondary status codes under each of these four (4) primary categories as you need.

- **Open Issues** are items that have not been corrected yet. There is still more work that needs to be done to resolve them. You can create different open statuses to reflect the current state of an issue being open, such as work in progress, or testing of a fix in-progress.

- **Deferred Issues** are items that still need to be resolved, but they will be worked on later. For example, you would defer an item if you were waiting on some documentation or more information from a client. The item is open, but cannot be worked on at this time.
- **Closed Issues** are items that have been resolved. They do not require any further work. For example, you may want to have several status codes for closed issues, such as: **Not a Defect, Verified, Tested, Resolved, and Deployed.**

These fields contain pre-defined code values to insure that consistent data is entered and to make it easy for a user to select the appropriate field value from a list of values.

The use of the system is made easier when the sets of code values chosen are familiar and appropriate for your organization.

**Status** – Defect Manager provides three (3) primary-status values for an issue/defect item that you control with certain built-in menu-bar operations (shown on the right, below) when using the Defect-Issue Window in Defect Manager:

- |                    |  |
|--------------------|--|
| 1. Open Defect     | <b>File → New; Action → Re-Open Defect</b> |
| 2. Closed Defect   | <b>File → Close</b>                        |
| 3. Deferred Defect | <b>Action → Defer</b>                      |
| 4. Enhancement     | <b>Update → Enhancement</b>                |

The primary-status values are fixed and built-in. However within each primary-status value, the status codes you use can be tailored to provide four (4) sets of status-code values that meet the needs of your organization and your business process.

The status of an issue is determined by a combination of its primary status and one of its secondary status values.

The table, shown below, lists the default sets of secondary status-code values for each primary-status code listed across the header row. The secondary status-code sets can be changed by adding and deleting values, from within each group, to meet your organization's needs.

Open Defect	Closed Defect	Deferred Defect
New	Bug	Need System Setup
Verified As Bug	Not A Bug	Waiting on Client
Fix Made	Documentation Error	
Fix Verified	How To	
Fix in Progress	Not Reproducible	
Packaged	Working As Designed	
On Hold		
Investigating		
Client Confirm Fix		

## Configuring Products

When items are reported, they are related to a particular **Product**.

As we discussed earlier, the Defect Manager concept of a **Product** is adaptable to the needs of your particular organization. So a product may be a hardware and/or software product, a project, a process or a service. In Defect Manager, Products are the things you support that must have their issues, defects and enhancements tracked and managed.

A Defect Manager **Product** is identified by its **Product Name**. Under any given **Product**, there may be any number of versions/builds of that **Product**. In Defect Manager, each version/build is referred to as a **Product Release**.

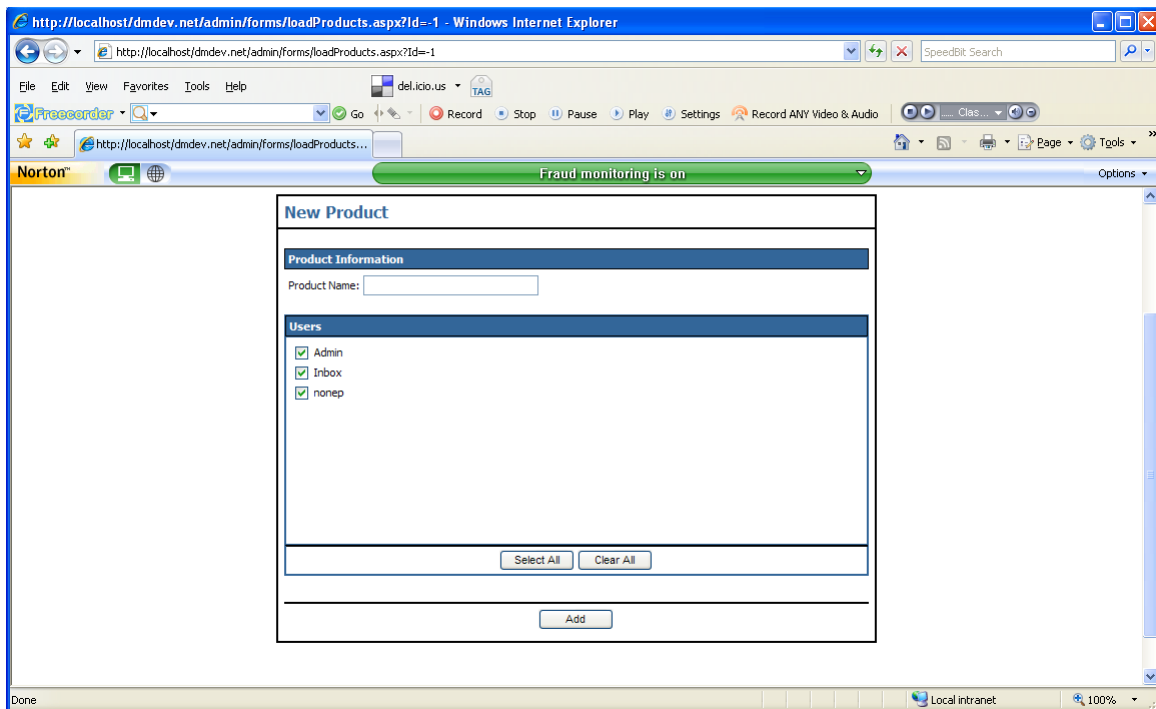
When you no longer support a product, you can also set the product to be inactive. This prevents anyone from opening a new issue or defect for a product that is no longer is valid.

It is important to de-activate products once you no longer support them, since it prevents invalid entries and it reduces the number of possible product selections when a new issue is being entered.

For each **Product Release**, default values for assignee, priority, severity, status and work queue can be specified. These default values will be set when users enter new issues.

## *Adding a New Product*

When you add a product, you will see the following window.

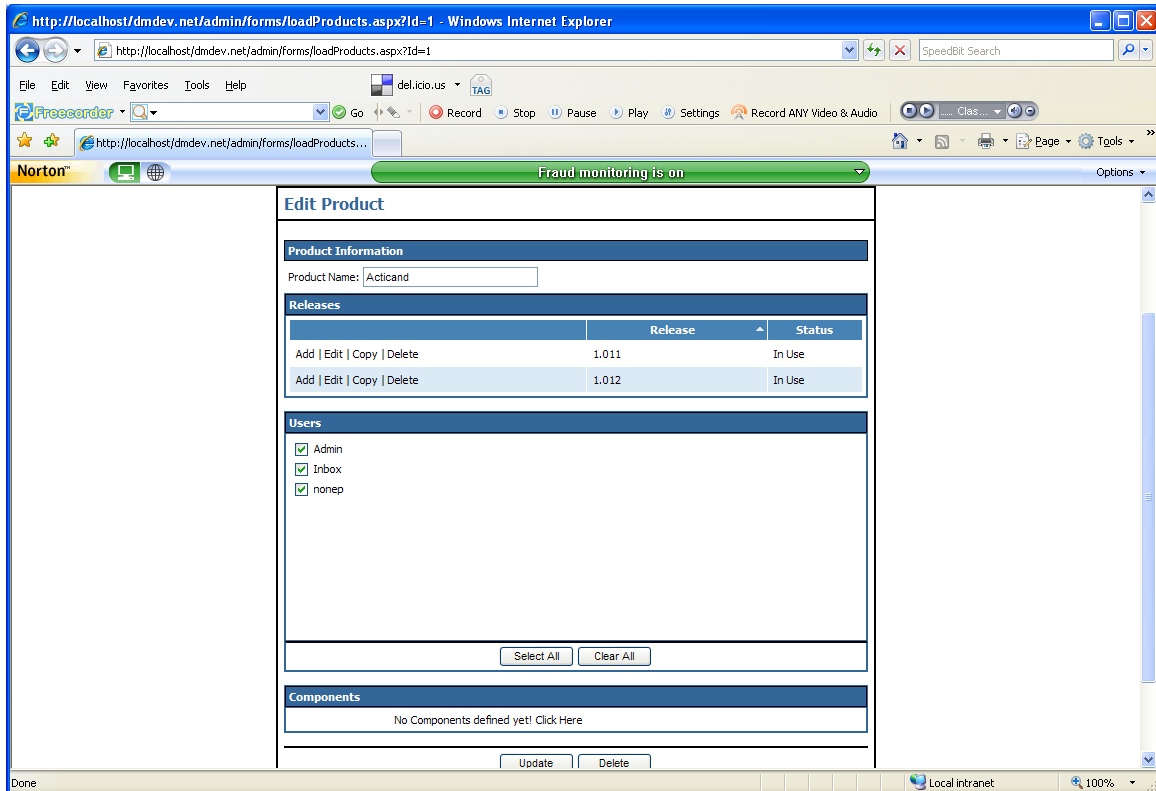


**Figure: New Product Window**

Below are the descriptions of each field in the *New Product* window.

- **Product Name** – The name for the product
- **Users** – Select the list of users that can work on this project. If you are not limiting user access to specific projects (see [General Settings Section](#)) then you can ignore this field.

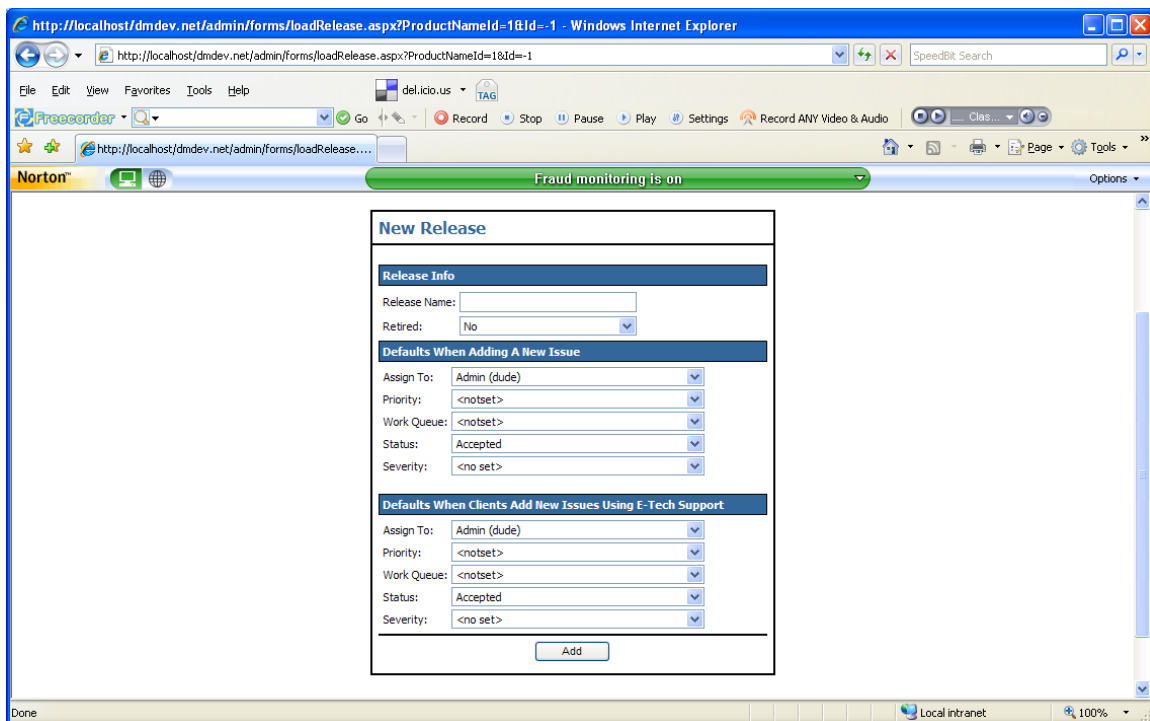
After clicking the **Add** button, you will be able to finish the set-up of the product as show below.



**Figure: Updating the Product**

You can now add new **Product Releases** and **Components** for this product.

## *Adding a New Product Release*



**Figure: New Product Release Window**

Enter the following fields to define the **New Product Release**:

- **Release Name** – The name of this release
- **Retired** – Whether the product is still active. When a product is retired, you can no longer log new issues against it.

### **Default Issue Assignment**

- **Assign To** – New issues for this product release will be assigned to this user.
- **Priority** - New issues for this product release will have this priority.
- **Work Queue** - New issues for this product release will be assigned to this work queue.
- **Status** - New issues for this product release will be assigned this status.
- **Severity** - New issues for this product release will have this severity.

### **E-Tech Support Default Issue Assignment**

- **Assign To** – New issues entered using the E-Tech Support interface will be assigned to this user.

- **Priority** - New issues entered using the E-Tech Support interface will have this priority.
- **Work Queue** - New issues entered using the E-Tech Support interface will be assigned to this work queue.
- **Status** - New issues entered using the E-Tech Support interface will be assigned this status.
- **Severity** - New issues entered using the E-Tech Support interface will have this severity.

## Adding a New Component

A component is a member or element of a product. These definitions can be physical or logical components that you decide to create to provide additional granularity in your tracking and management of products, projects, processes or services.

Software Components may be defined as a: specific executable program, dynamic link library (DLL), web HTML page, web site, software application module, etc.

For example, a problem identified in Oracle Financials (**OFIN**) can be located in the Vendor Records (**VenRec**) portion of its Accounts Payable (**AP**) module. Since Oracle Financials is a very large application with many application modules and component modules, the problem area can be closely identified as in a specific software component with a component code such as: **OFIN-AP-VenRec**.

The defect's **Description** field may further identify the specific form-window name in the application where the problem occurred since a windows screen might be too-low level of detail to be used as a **Component** in large applications with hundreds of screens.

You can specify **Component Codes** for meaningful areas where issues may occur. By carefully selecting your product and component code definitions you can create an effective way to identify and report where issues and defects are occurring. This will allow you to determine which areas of your product and its components are more prone to issues.

Component codes can be related to specific product, or they can be valid across all products.

It is important to establish an effective balance so that products and components do not result in too many codes to be manageable or have too few codes to be meaningful.

Having a balanced and uniform set of codes to describe the products and components you support will help you and your management track and understand how to take appropriate action to lessen the defects in more problematic areas of your products.

## Removing a Product

When you remove a product from the system, the following occurs:

- The product is deleted
- All product releases for the product are deleted.
- All reported issues for the product are deleted.

**Important: Products (and all the reported issues) that are removed cannot be recovered by Defect Manager. It is possible that you could recover them from a previous database back-up, but that depends on your system maintenance program.**

### *Removing a Product Release*

When you remove a product release from the system, the following occurs:

- The product release is deleted.
- All reported issues for the product release are deleted.

**Important: Products Releases (and all the reported issues for that release) that are removed cannot be recovered by Defect Manager. It is possible that you could recover them from a previous database back-up, but that depends on your system maintenance program.**

## Running SQL Scripts

Defect manager gives you the ability to run SQL scripts. Normally you would never do this on your own, but you might be instructed Tiera Software Technical Support to apply a patch or diagnose a problem. You might also use this to load some of the sample repository configurations.

You can also use this capability; given the following restrictions:

- Cannot do Select statements.
- Multiple statements need to be delimited by semi-colons.
- Passes the SQL statement as it is coded.

To run a SQL script you will choose the **Run SQL** menu item. The script will be run against the repository.

## Reminders Overview

Everyone needs to be reminded of something. Defect Manager can remind you and your staff of all the outstanding issues and defects that need your attention with reminders sent via e-mail.

Reminders notify staff and management of the pending work that needs to be performed to resolve defects that are still outstanding. Reminders can be particularly useful for:

- Developers and managers who want a snapshot of all the pending items that are assigned to them and/or their staff via e-mail.

The snapshots can be created at any interval, such as hourly, daily, monthly, etc. and any hour, depending on the need of your company. For instance, Defect Manager Reminders can be run every evening, so that when employees come to work their e-mail reminder will be waiting for them – alerting them to the existing and new items that they have the responsibility to process.

- Managers who are traveling and do not have access to Defect Manager, but do have access to e-mail via a hand-held PDA device, laptop, or web-enabled mobile phone can get summary reports on issues and defects that are still open and need attention.
- Users can receive reminders of their assigned defects. Managers see a summary of all open defects for all users.
- E-mail reminders are also an effective way to communicate with those working from remote virtual offices.

### ***Setting up Reminders***

You can set up an unlimited number of reminders for an unlimited number of users. You are only limited by processing power and network bandwidth for e-mail. The process for setting up reminders is as follows.

- Create a list of users for a functional area.
- Optionally, create a list of managers that would want to see the defects for that functional area.
- Optionally, create a list of users that will be cc'ed for each of the user reports.
- Use Windows 2000 task scheduler or other windows scheduler (such as WinCron) to run the Defect Manager Reminders.

## ***Reminder Lists***

The system Configuration Manager sets up lists of users by workgroup, area of responsibility, manager, etc. There are three types of lists. ***User lists***, ***Management Lists***, and ***cc Lists***.

- When Defect Manager Reminder is run, it will send an e-mail reminder to each user in the ***User List***. In that e-mail will be a list of issue items that are open for that user.
- A ***Management List*** is a list of management users that will receive a summary of all the open defects for individuals on the user list that received reminders.
- A ***cc list***, called “carbon-copied list”, is a list of users that will be copied when each e-mail reminder is sent to the individuals on the user list.

Each list is specified as a text file of items, with one (1) list-item on each line.

When the Windows 2000 Task Scheduler (or equivalent program) runs Defect Manager Reminders, the command line should delimit a list of multiple list-file-names on one line with the semicolon character (;).

When you are creating a Defect Manager User list, each item in the list is placed on a separate line of the text file:

**Defectmanagerusername-1**

**Defectmanagerusername-2**

...

where **defectmanagerusername-n** is the user id for a Defect Manager worker (i.e., a User), as defined in the repository under the **Users** part of the repository tree.

For example, you might create a user list file called **techsupport.lst** that includes Harry Thornton and Sharon Tweed. This **techsupport.lst** would have the following entries in the file:

**harryt**

**sharont**

When you are creating a management list, or a cc list, each item in the list is placed on a separate line of the text file:

**<e-mailname-1>Friendly Name-1**

**<e-mailname-2>Friendly Name-2**

...

where **e-mailname-1**, **email-name-2** are the e-mail address and **Friendly Name-1**, **Friendly Name-2** are the appropriate text string for each e-mail respectively.

For example, you might create a manager list file called **techsupportmanager.lst** which would have the following entries in the file:

<johnt@yourco.com>**John Techmanager**

<cliffb@yourco.com>**Cliff Bossman**

Optionally, you can create a list of names of people who will be cc'ed on the reminders that will be sent to the **techsupport.lst** (e.g., Harry Thornton and Sharon Tweed).

You will create this association between a reminder list and the associated cc-reminder-list when you schedule the generation of reminders to run. The Reminders program can be automatically launched at a predefined time by the Windows Task Scheduler.

Once the lists are created you are ready to schedule the Defect Manager Reminder.

### ***Generating Reminders***

To generate reminders to your user, the ***Reminders program*** must be executed. When this program is run, it takes the following parameters:

```
Reminder HOME="dmhomepath" FILEDSN="dmfiledsnpath"
DBUSER="dbusername" DBPASSWORD="dbpassword" USERLIST="userlist"
MANAGEMENTLIST="managementlist" CCLIST=userclist
```

Please observe the following notes:

- All parameters are separated by blanks.
- All parameter values such as *dmhomepath*, that have embedded blanks must have quotes around them.
- There should be no spaces between a parameter name and parameter value.

**Important: In most cases you do not need to set any parameters and you can just start the executable.**

An explanation of parameters for the ***Reminders program*** follows.

- **[HOME="dmhomepath"]**

This parameter is the path where the product is installed. If the product was installed in c:\Program Files\Defect Manager, then this parameter would be:

```
HOME="c:\Program Files\Defect Manager"
```

- **[FILEDSN="dmfiledsnpath"]**

This optional parameter is the path where the FILEDSN is located. The FILEDSN is used to connect to the database via an ODBC Data Source Name (DSN).

- The Defect Manager Reminder program will automatically look for the ***defectmgrwe.dsn*** (the default, when Microsoft Access holds the repository) or ***defectmgrdsn*** .

If you are using Access to implement your repository, this DSN is the default so you can omit this parameter.

- If you are using another type of database to implement your repository, use the FILEDSN value *defectmgr.dsn* (for SQLServer, Ingres II, and Oracle) in the \bin directory where you installed the product.
- If you are using a FILEDSN in another location, such as

**c:\Document Settings\Common\ODBC\defectmgr.dsn,**

then this parameter would be:

**FILEDSN=" c:\Document Settings\Common\ODBC\defectmgr.dsn"**

- **[DBUSER="dbusername"]**

This optional parameter is used if you configured the system with an ODBC DSN (data source name) of *defectmgr* .

A Microsoft Access database does not require this parameter, but the other types of databases used to implement the repository require it. If the specified user name requires a password, then you will also need to specify the **DBPASSWORD** parameter as well.

- **[DBPASSWORD="dbpassword"]**

This optional parameter is used only if you configured the system with an ODBC data source of *defectmgr* (for SQL Server, Oracle, DB2, Sybase, Ingres II, and Postgres).

When using these databases, you need to specify a database user name to establish a connection to the database. If the specified user name requires a password, then you will also need to specify this parameter as well.

- **[USERLIST="userlist"]**

This optional parameter specifies a list of users that should be reminded of their open defects. If this parameter is omitted, all users will be reminded. The user list can be specified as an in-line list of users separated by semicolons:

**USERLIST="mgould;hschwartz"**

or as a file that contains the list of names that exist in a file:

**USERLIST="@userlistfilename"**

*Note: The ampersand (@) prefix in this parameter indicates that a file name follows.*

- **[MANAGEMENTLIST="managementlist"]**

This parameter specifies a list of users that will receive a summary e-mail of all open defects for all the users specified in the USERLIST parameter. The management list can be specified with a list of users separated by semicolons or a file that contains the list of management names. Management users are always defined as:

**<Friendly Name> e-mailname**

Using the in-line form would be:

**MANAGEMENTLIST =”<Mark Gould>mgould@a.com; <Harry Schwartz>hschwartz.com”**

Using the file list form would be:

**MANAGEMENTLIST =”@userlistfilename”**

*Note: The ampersand (@) prefix in this parameter indicates that a file name follows.*

- **[CCLIST=usercclist]**

This parameter specifies a list of users that will be copied on every e-mail reminder that is sent to each user specified in the USERLIST. The cc list can be specified with a list of users separated by semicolons or a file that contains the list of cc users. Cc users are always defined as: **<Friendly Name> e-mailname**

Using the in-line form would be:

**CCLIST =”<Mark Gould>mgould@a.com; <Harry Schwartz>hschwartz.com”**

Using the file list form would be: **CCLIST =”@userlistfilename”**

*Note: The ampersand (@) prefix in this parameter indicates that a file name follows.*

To have the Reminder program run periodically, we recommend that you use the **Windows Task Scheduler**.

For instance, you can configure the Windows Task Scheduler to run different sets of reminders nightly, so that everybody will have their reminders in their e-mail inbox when they arrive for work the next morning.

### ***Troubleshooting Reminders***

The Defect Manager Reminder program runs in two stages. The first stage parses the command line, and the second stage actually creates and sends the reminder e-mails.

If the Defect Manager Reminder encounters problems during the first stage, it finishes and sets a non-zero return code that will indicate the type of problem encountered.

After the first stage completes successfully, the second stage begins. During this stage, Defect Manager Reminder creates a log file where all reminder activities are recorded.

If stage two fails, Defect Manager Reminder sets a non-zero return code, and you will have to review the log file in order to see what went wrong. The Defect Manager Reminder program places the log file in the **\Reminders\Log** directory.

The log filename format is:

**logmm-dd-yyyy-hh-mm-ss.txt**

where **mm** is month,

**dd** is day,

**yyyy** is year,

**hh** is hour,

**mm** is minute and

**ss** is the second that the reminder was run.

You can view this file with any text file viewer, including notepad. You should periodically delete obsolete log files to reclaim disk space.

Below are the Defect Manager Reminder *return codes* and their meanings.

<b>Return Code</b>	<b>Return Code Meaning</b>
0	Success – Everything worked fine.
1	Internal error. Call Technical support.
2	No parameters specified.
3	Invalid parameter specified. The parameter was not recognized.
4	No HOME parameter specified.
5	Invalid HOME directory
6	License check failed. The .lic file in the \bin directory is missing or has expired.
7	Could not open a list file. Check log file for more info.
8	Could not connect to database. Check log file for more info
9	Processing the request failed. Check log file for more info

**Figure: Defect Manager Reminder Return Codes**