User Guide – E-Tech Support

Defect Manager Release 4.6

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About the User Guide – E-Tech Support

This guide describes how a client can use ***E-Tech Support*** to enter his or her own issues. These issues may be suggestions, questions, defect/bug reports and enhancement requests for products, products, processes or services that are stored and tracked in the Defect Manager's Repository. Your supplier's support team uses this Repository to efficiently find your pending issues and resolve them.

E-Tech Support allows you to interactively enter issue reports plus view the status and progress of your issues as well as those submitted by others in your organization from the web-browser on your workstation or laptop.

The purpose of this guide is to assist you in learning what you can do and how to do it with ***E-Tech Support***. This manual is written from the perspective of – **You** as the customer communicating your problems and your needs to your supplier-organization's support team.

Because You can use ***E-Tech Support*** to update the same Repository as the support team does using ***Defect Manager for Windows or Web,*** You become a vital extension of the support team – This manual is Your User's Guide to the E-Tech portion of the overall Defect Manager system.

Additional information on the purpose of Defect Manager can be found in the sections: **What is E-Tech Support?**, **What are the Benefits of E-Tech Support?**

Other Defect Manager Guides

This ***User Guide – E-Tech Support*** 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***
- ***Administration Guide***
- ***Programmer API Guide***
- ***Glossary***

What is E-Tech Support?

Defect Manager E-Tech Support is an interactive software product from ***Tiera Software*** that allows clients of companies that use Defect Manager to participate in the entry, processing and reporting of: issues, defects, suggestions and formal enhancement requests using an internet web-browser.

Client companies can use ***E-Tech Support*** to directly submit their trouble reports, defects and other issues without suffering long delays trying to reach a help desk. This expedites the process of getting problems reported, analyzed and results returned in the form of a work-around or a permanent fix.

Clients may also query the web-based Knowledgebase of technical problems and fixes from their web-browser. The Knowledgebase content is selectively published to your supplier-organization's website by Defect Manager. Many defect reports may be avoided by such searches and use of the solutions found.

After submitting a defect report or enhancement request, a client's staff can check on the status and progress that has been made on the issue he or she submitted using an internet web-browser on their workstation.

Whether or not they are using ***E-Tech Support,*** complementary features within Defect Manager assist the support staff by issuing automated notices and reminders that maintain effective communications with the client and other stakeholders on each reported issue.

When the support group asks a client for more information on a reported issue, the client worker can easily use the ***E-Tech Support*** interface to add a note or attach the required information to an issue item stored in the Defect Manager Repository used by the support team.

E-Tech Support provides a flexible and independent way for client technical staff and a supplier's support staff to work together to resolve issues related to the supplier's products, projects, processes and services.

Clients that are provided with ***E-Tech Support*** by their supplier/support organization can feel secure that staff will not see their defect-reports from other organizations. Each organization's staff using E-Tech can only view and enter their own reported issue items.

E-Tech Support works in browsers such as Internet Explorer and Mozilla Fire Fox.

E-Tech Support Benefits

Defect Manager E-Tech Support enables clients and prospects to:

- Enter new defects against products/services they have purchased or projects they are involved in as external participants.
- Review defects that they and co-workers in their organization have reported.
- Update defect information and enter additional information and comments about the defect as part of the defect resolution process.

- Enter bug and trouble reports anonymously
- Search the knowledgebase for like problems and solutions.

Defect Manager benefits the supplier/support organization by automatically:

- Adding prospects to the repository when they download the evaluation software from the organization's website.
- E-mailing prospects when they sign up for support or download a product from the organization's website.
- E-mailing prospects their logon user name and password when they have forgotten it and request it on the organization's website.
- Keeping a complete record of all interactions between the support team and clients decrease the time required to resolve the problem.
- Assisting the supplier's clients to resolve many of there own issues 24X7.

E-Tech Support Users

There are typically two principal types of users that come to the supplier/support site.

- Those clients that have already purchased supplier's products or are involved in a supported project
- Those prospects who are visiting your website to gain information or perhaps to evaluate your products, but have yet to purchase products or services.

Although users of both types may want to make suggestions, report defects and propose enhancements for products plus search the knowledgebase -- the way you handle each type of E-Tech user is a little different.

Users that are clients can review defects that they have reported previously. ***E-Tech Support*** authenticates each user as they logon to the system, so they can only see those defects reported by them and others from their organization.

Those that are <u>not</u> clients (i.e., prospects) can register as a guest, and for a limited time, they can review issues and defects that they have reported previously.

E-Tech Support can be, optionally, configured by the system administrator that users can report defects without having to register.

Defect Manager E-Tech Support is designed to handle both of these types of users.

How the System Works – Using E-Tech Support

Repository and Activity Log

The ***Defect Manager Repository*** is the central database for the Defect Manager system. It organizes all of the issue items and related information needed enter, track and resolve issues/defects.

The three primary Defect Manager Systems: ***E-Tech Support***, ***Defect Manager for Windows*** and ***Defect Manager for Web***, utilize the same Repository database and provide their users with access to stored issue-item information.

A key part of this repository database is the *Client* ***History Log*** that stores a record of all activities that are performed by both the support team and the client to resolve an issue.

Knowledgebase

The ***Defect Manager Knowledgebase*** is a separate information store that is available as web-pages over an Internet/Extranet network by using the ***E-Tech Support*** system.

Issue items from the Defect Manager Repository are selectively published to this web-based information store. This makes the published-items available for viewing by issue/defect stakeholders and clients authorized to use the ***E-Tech Support*** system.

Internal Actions/Notes, Source Code, and Test Results are not included when an issue item is published since they are for internal support team use. However, the External Actions/Notes are included along with selected other properties in the Knowledgebase.

Logon to E-Tech Support

E-Tech Support needs to know who you are when you are using the system. All clients using E-Tech will have user names and passwords to identify themselves. They will need this information to logon to the system.

Note: To implement the client ***E-Tech Support*** logon capability on the organization's website, the system administrator establishes a link in the organization's website to the E-Tech logon web page: **default.asp**.

From the organization's website where the link to E-Tech logon is placed, the user will enter their user name and password and the logon request will be authenticated. For example, the ***E-Tech Support*** logon web-page on the ***Tiera Software*** website appears as shown below.

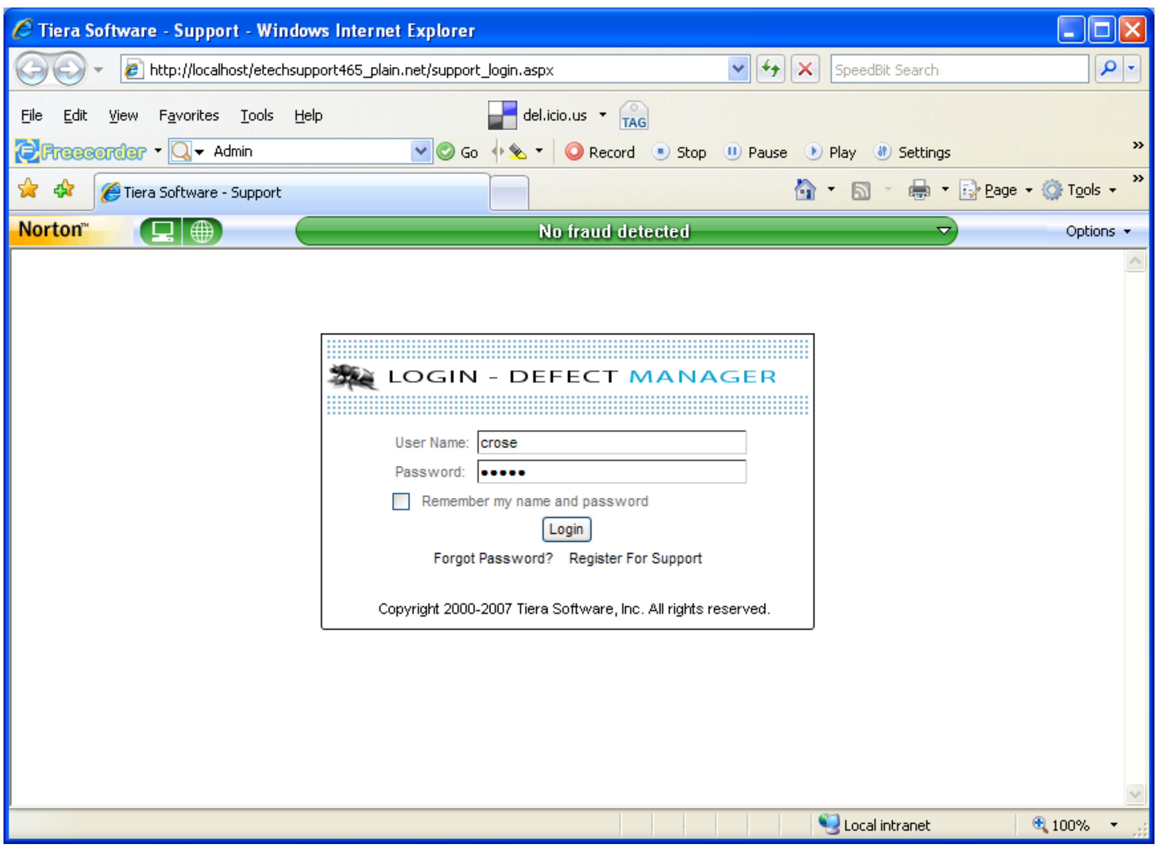

Figure: Example E-Tech Support Logon Web Page

After entering your User Name, Password , and clicking the **Login** button, the end user is authenticated and the "***Home***" web page (shown in the next section).

If you have forgotten your password, click the **Forgot Password** link and the following Forgot Password web page will be displayed as shown below:

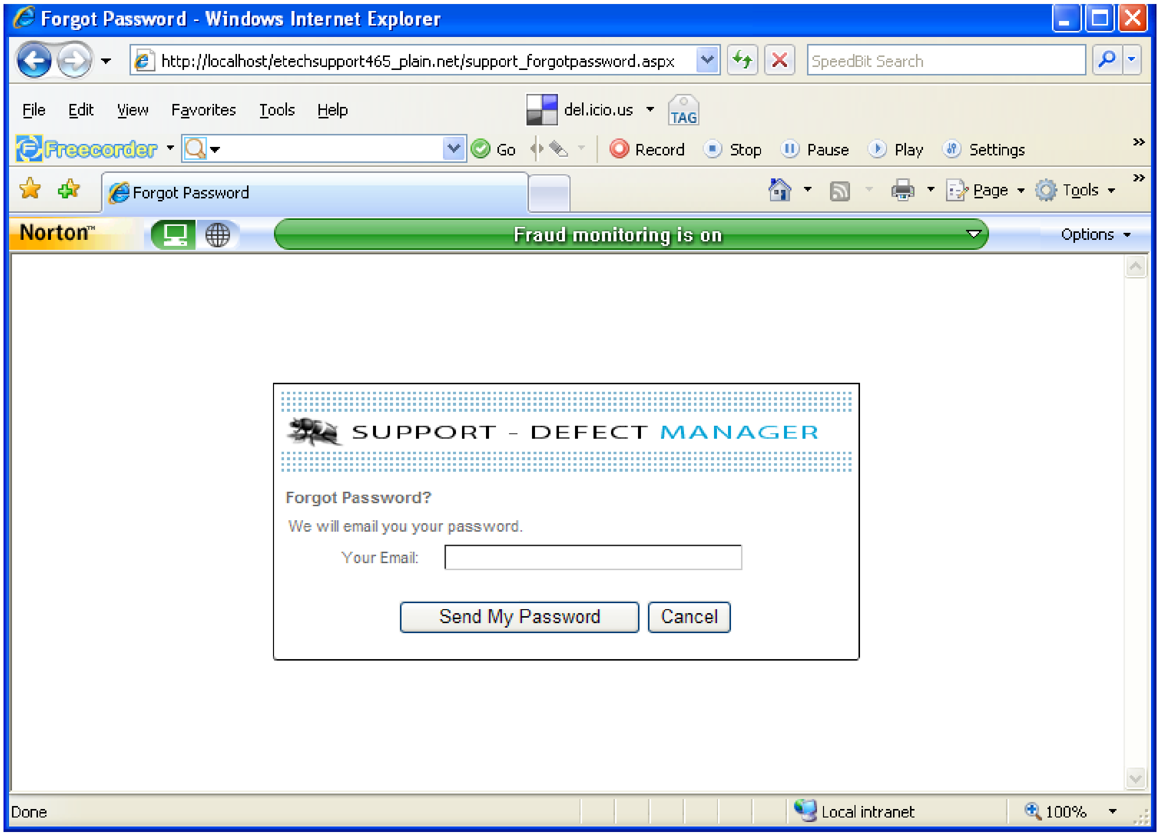

Figure: Forgot Password Web Page

Enter your-mail address and press the **Send My Password** button and your username and password will be emailed to you.

E-Tech Support -- My Defects Log Page

The ***Home*** web page, allows you, the E-Tech Support user to:

1. Report new bugs, questions, and enhancement requests.
2. Review the issues (defects, enhancements , etc.) that you have reported
3. Review the issues that your company has reported
4. Review status (updates and notes that the technicians have made) on existing issues.
5. Add notes, attachments to an existing issue item to allow technicians working on your issue items can review
6. Export issues to a CSV or XML file.
7. Print your issues in a variety of report formats.
8. Search the knowledgebase for resolutions to problems that you are having.

After logging in to the system or registering as a user, the *Home* page will be displayed as shown below:

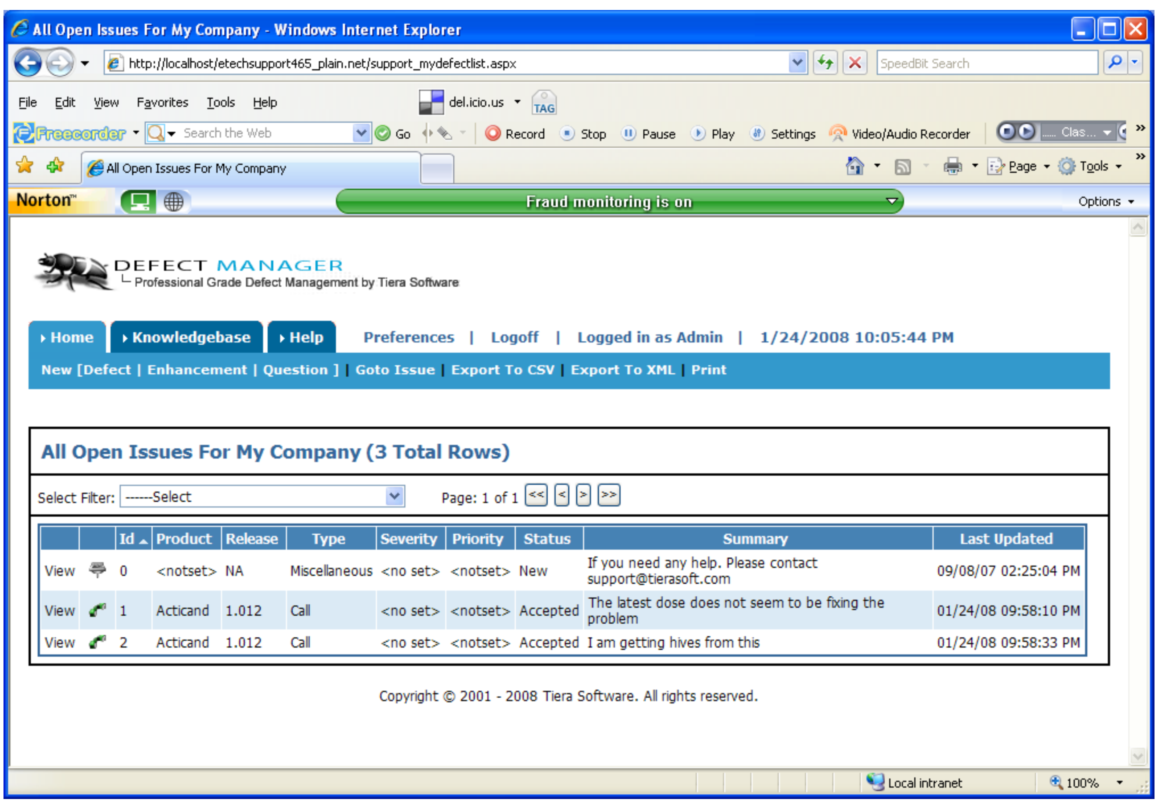

Figure: E-Tech Support – Home Web Page

The ***Home*** web page displays a list of "My Open Issues" since that it the default Filter Selection.

The **Menu Bar** on this web page provides the following functions:

- **New –** Report a new issue in the Repository
- **Search the Knowledgebase –** Enter a search criteria and search the published Defect Manager Knowledgebase of similar issues and prior problem solutions
- **Export to Excel –** Export selected issue information in the Repository to an Excel spreadsheet for analysis and reporting
- **Export to XML –** Export selected issue information in the Repository to an Excel spreadsheet for analysis and reporting
- **Preferences –** View and maintain parameters regarding your user profile in the Repository.
- **Print –** Print (in report format) the issues that are currently being viewed
- **Logoff –** Exit the system

You can select an item (i.e., a row) by placing the cursor over it and clicking the left-mouse button. This will display the Issue-Defect Item web page with the detail for the selected item displayed (for more information on this see the section: **E-Tech Support – Issue-Defect Item Web Page**).

The additional fields on each row can be viewed after scrolling horizontally to the right or by clicking the full-screen button, in the upper right-hand corner, when your monitor size and screen resolution permit it.

Hint: If you rollover the **Summary** of an issue, the description for the issue will be display in a small window.

Using Filters to Selectively Display Log Items

You can also change the display contents by selecting a new filter in the ***Select Filter*** drop-down list shown below.

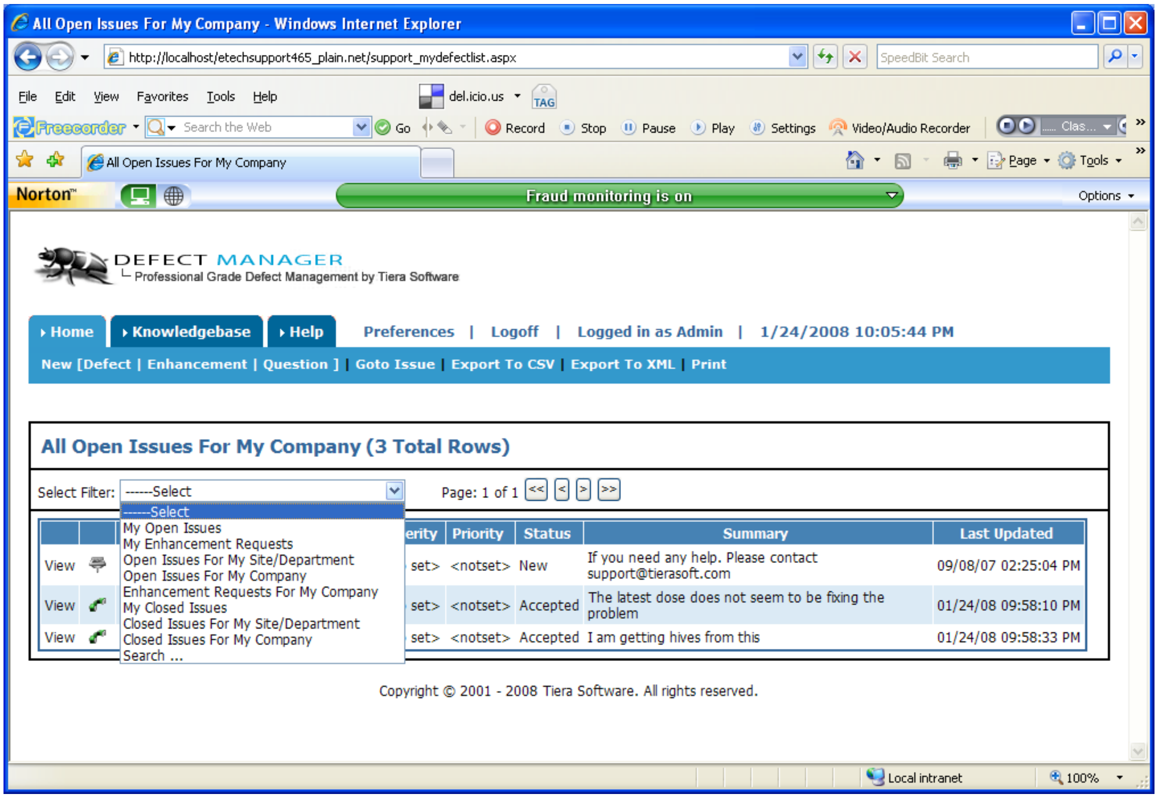

Figure: Changing the List of Issue Items – By Filter Selection

This display makes it very convenient for you to review the status and progress of the issues your company has reported.

In addition to using ***E-Tech Support*** to enter and review issues, the Defect Manager system is used by the support staff who are able to view and work on your issues providing you with support communications regarding issues you have reported.

The **Select Filter** drop down gives you choices of pre-defined filters as well as the ability to perform ad-hoc queries.

Ad-hoc Queries

Selecting the "**Search …**" item from the **Select Filter** drop-down list allows you to perform ad-hoc queries to search for certain items as shown below:

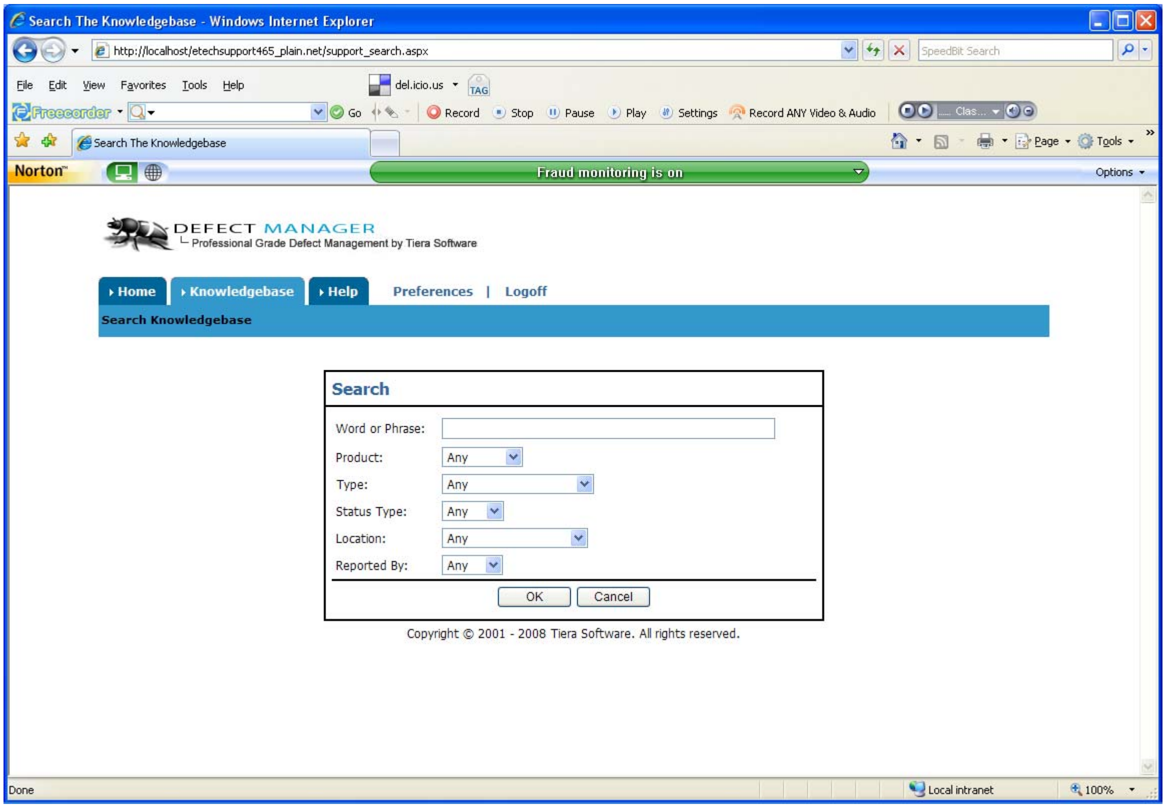

Figure: Changing the List of Issue Items – By Filter Selection

E-Tech Support – Report A New Issue

You can use the **Menu Bar** selection **New** to report a new issue (defect, enhancement, etc.) as shown below:

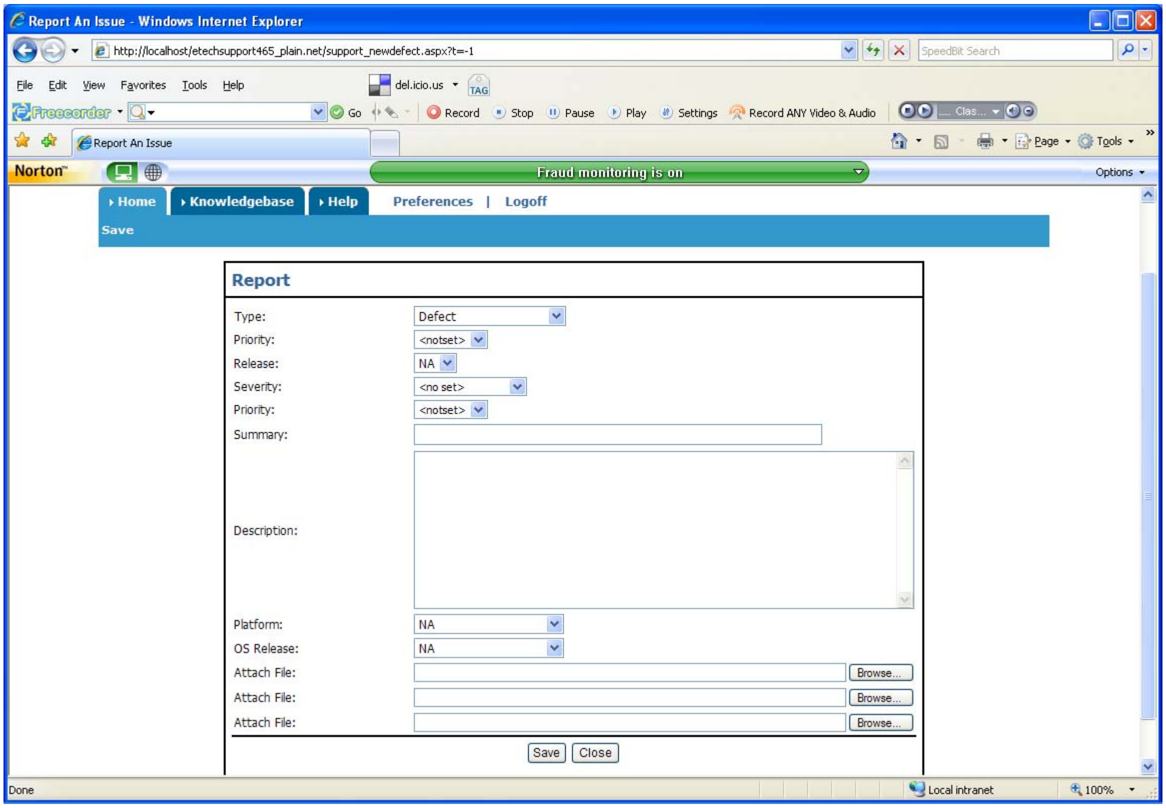

Figure: Report A New Issue

Using the first drop-down **Types** as shown above, select the type of issue that you want to report from the **Types** drop-down list.

From the second drop-down list shown above, select from a list of **Products** that are defined for you and your company -- the product that is the subject of this issue report.

Select the **Severity** for this issue from the second drop-down list of **Severity Codes.**

Select the **Priority** for this issue from the second drop-down list of **Priority Codes.**

Enter a brief **Description** of your issue, defect or enhancement suggestions in the third field.

Enter the **Steps To Reproduce** the problem if applicable. You can also use this field to provide additional information relevant to this issue.

Optionally, press the **Browse** buttons to select files that you would like to attach to this issue.

Press the **Save** button, to report your new issue. The system will then display the reported issue confirmation page as show below:

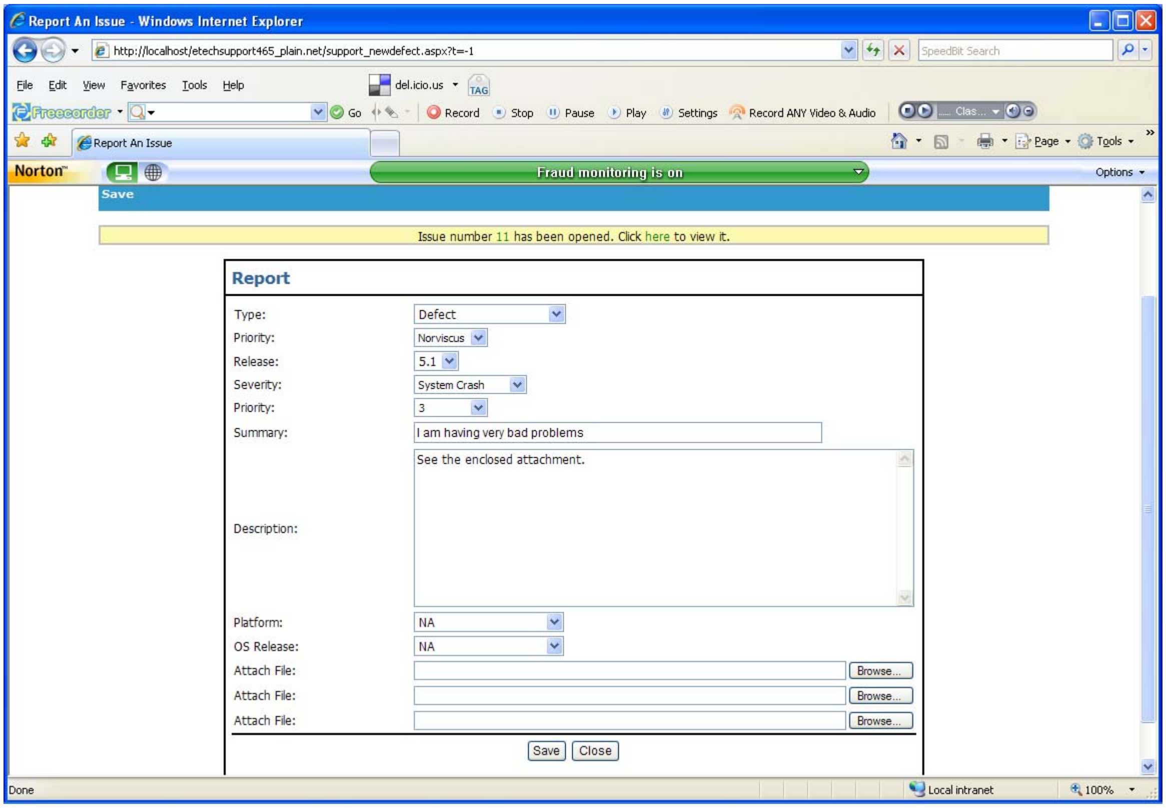

Figure: Report A New Issue Confirmation

This status line under the menu bar displays the unique ID assigned to the newly report issue and a link to it. You can continue to enter new issues, click on the new issue link in the status line, or click the **Close** button to return to the home page.

E-Tech Support – Issue Item Web Page

You can view and update an existing issue item by selecting the specific item on the ***Home*** web page. You select an item by placing the cursor over the **Summary** of the item and clicking the left-mouse button, or clicking the **View** link tot he far left of the item. Selecting an item will cause the ***Issue Item*** web page to display details about the selected item as shown below.

Issue Item Web Page – Overview Folder

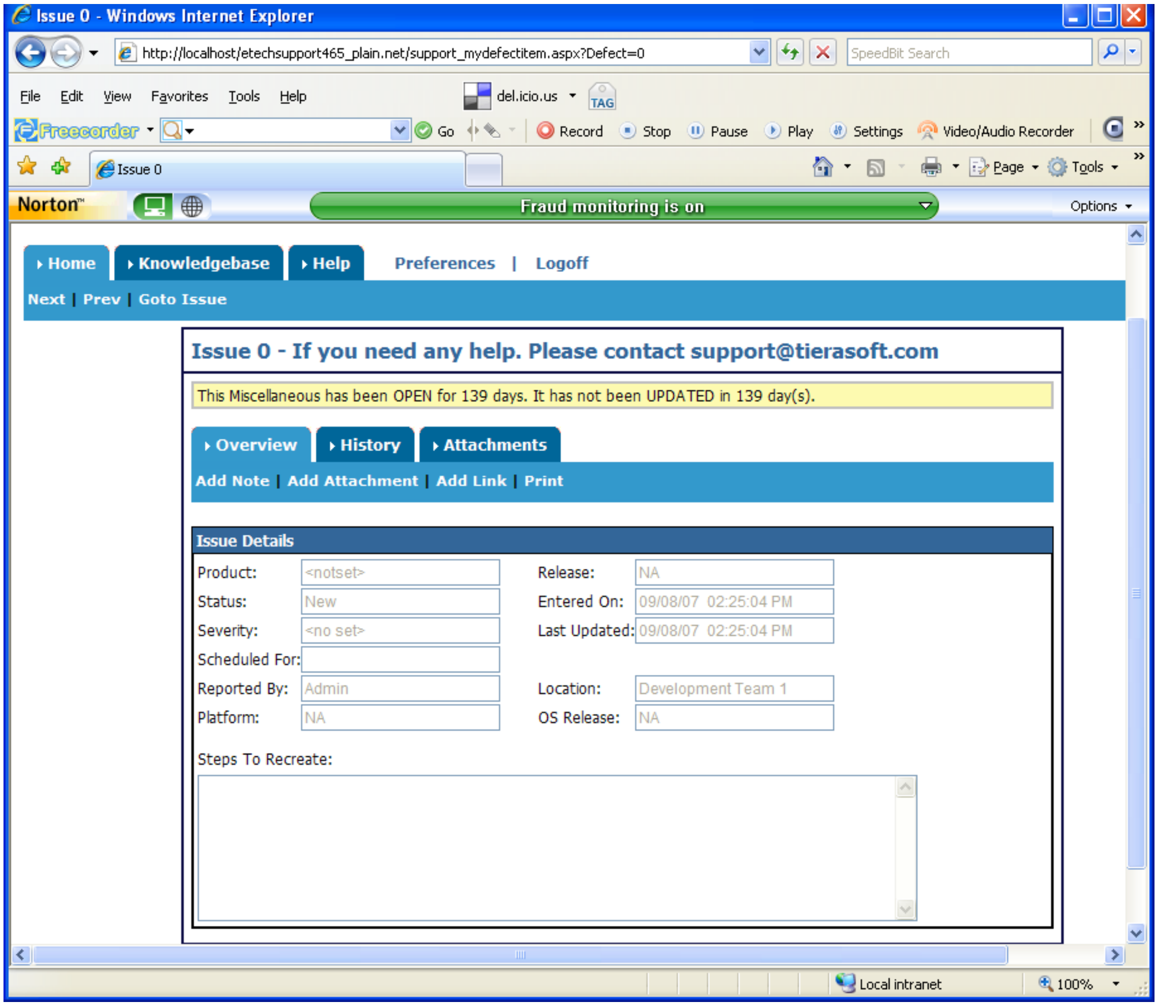

Figure: Issue Item Web Page – View/Update an Existing Item

The Issue Item web page allows you to view a detailed summary of the selected issue item, notes, and attachments. This page also provides a way for you to provide supplemental information, after the item was originally reported such as:

- Add a note
- Add an attachment
- Add a link (URL)
- Print the detail report format in one od several different formats j

Issue Item Web Page – History Folder

The **History Log** tab allows you to view a chronological journal, starting with the most-recent history. You can use this tab to enter a note.

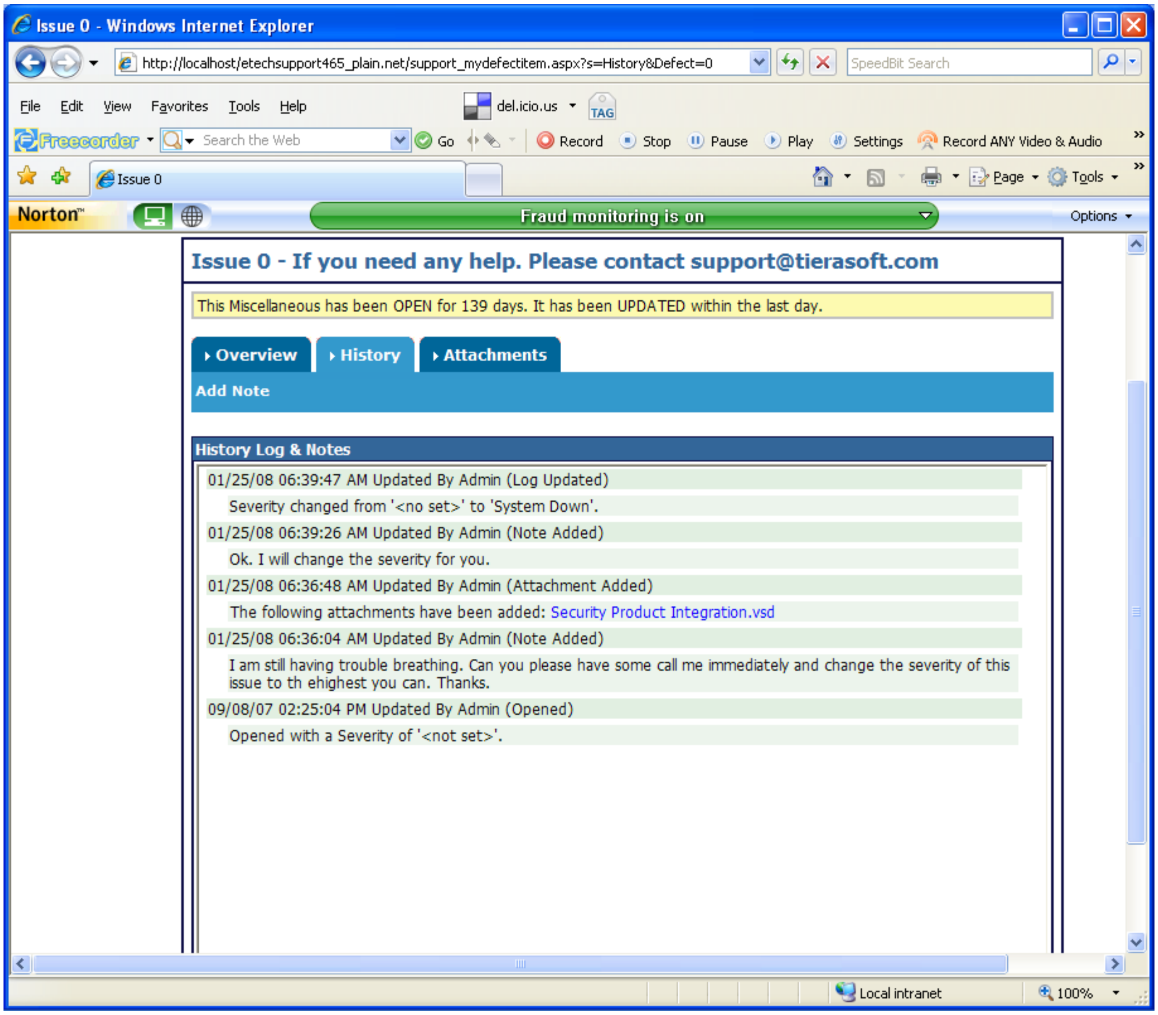

Figure: Defect History Tab

The History Log tab allows you to view Activities performed on an issue item in reverse-chronological order so you can see the most-recent activities first. The top part of the window shows all the entries in History Log. Some entries in the History Log may be very large (such as notes that you or a technician have entered) and will not be displayed cannot be displayed in their entirety. To see all the information in an entry, you can click on the entry with the left-mouse button, and all information for the entry will be displayed in the bottom window.

If you wish to add a note entry to the log, press the **Update** button and the following window will be displayed

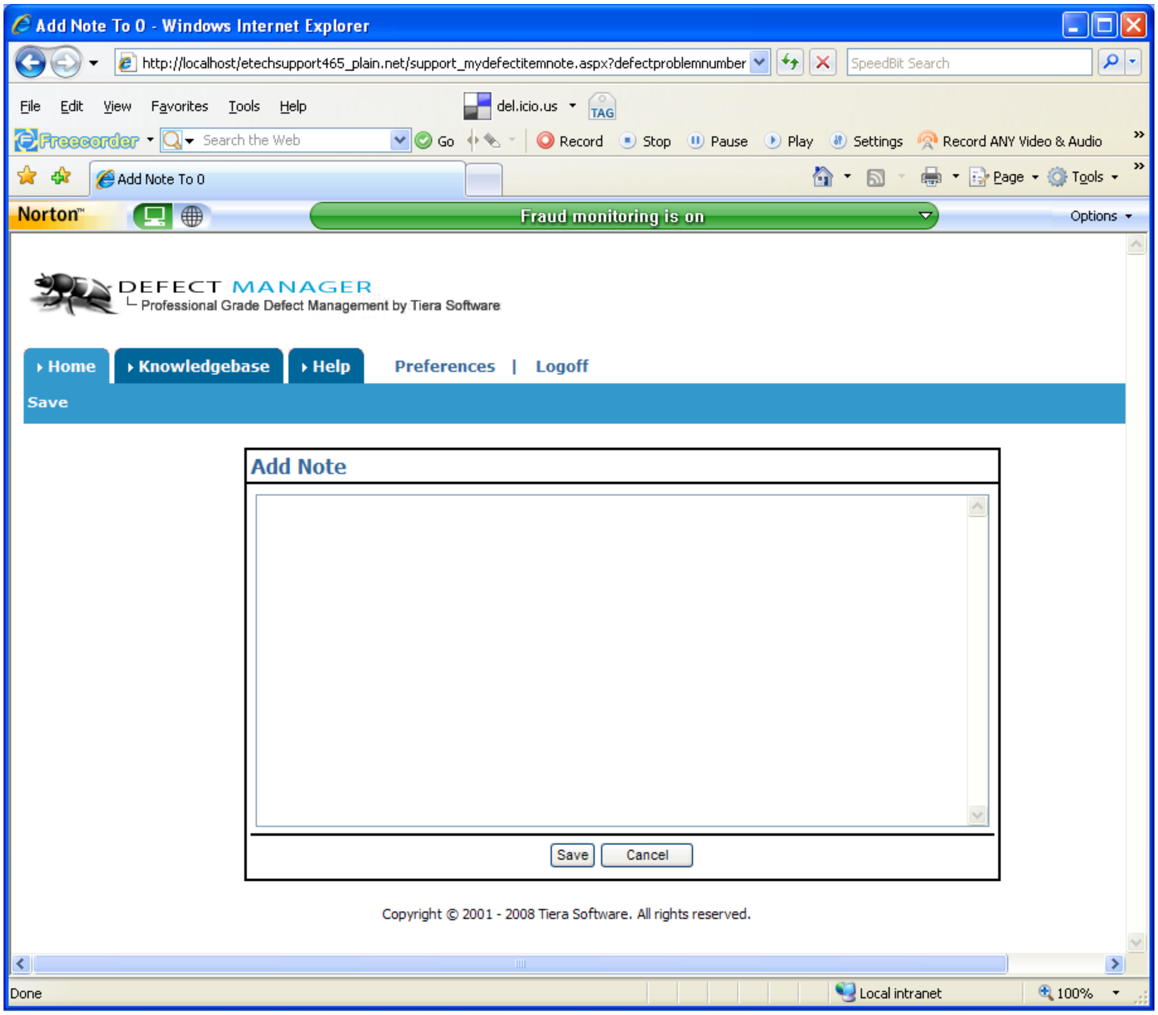

Figure: Add Note

Enter the note that you would like to have added to the issue and press the **Update** button. The note is now stored in the Defect Manager Repository and is associated with this item.

Issue Item Web Page – Attachments Folder

The **Attachments** tab allows users to add, remove and review attachments that have been added to an issue. Defect Manager supports two types of attachments. File attachments and link attachments. File attachments are physically uploaded and stored by Defect Manager. Link attachments are URLs to a resource.

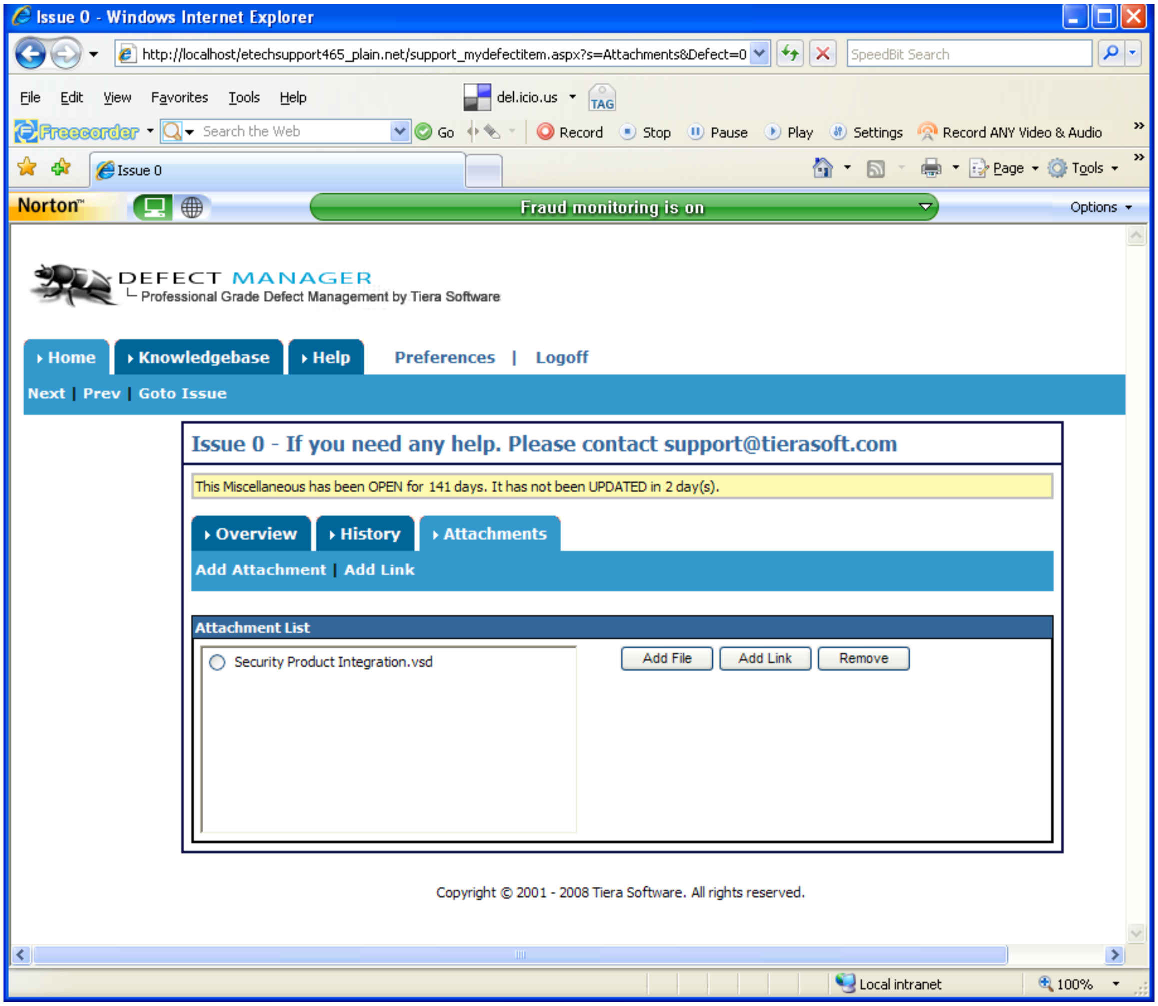

Figure: Attachment Tab

To review an attachment, just click on the hyperlink of the attachment and it will be displayed (if possible) in another window.

To add a file attachment, just click the **Add Attachment** button. The following window will be displayed.

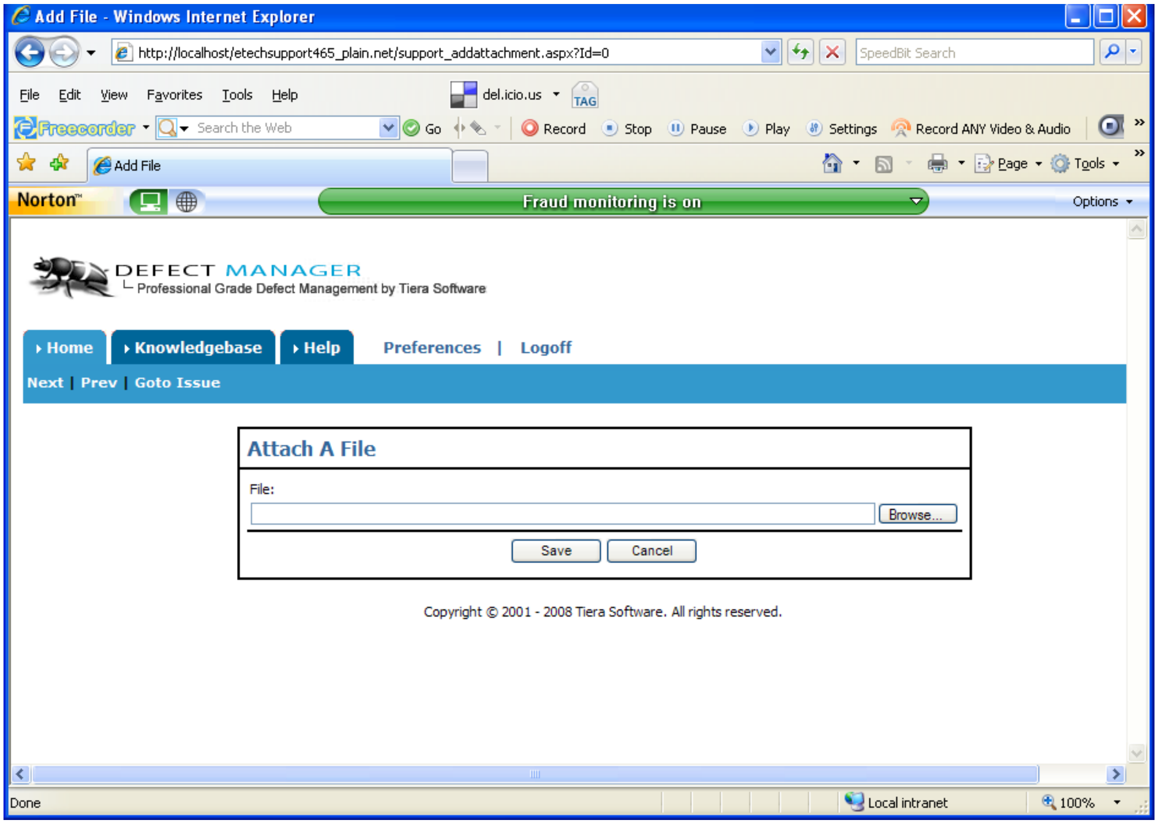

Figure: Add-Attachment Selection Form

After selecting the desired attachment file, click the **Open** button and you are returned to the **Add Attachment** form.

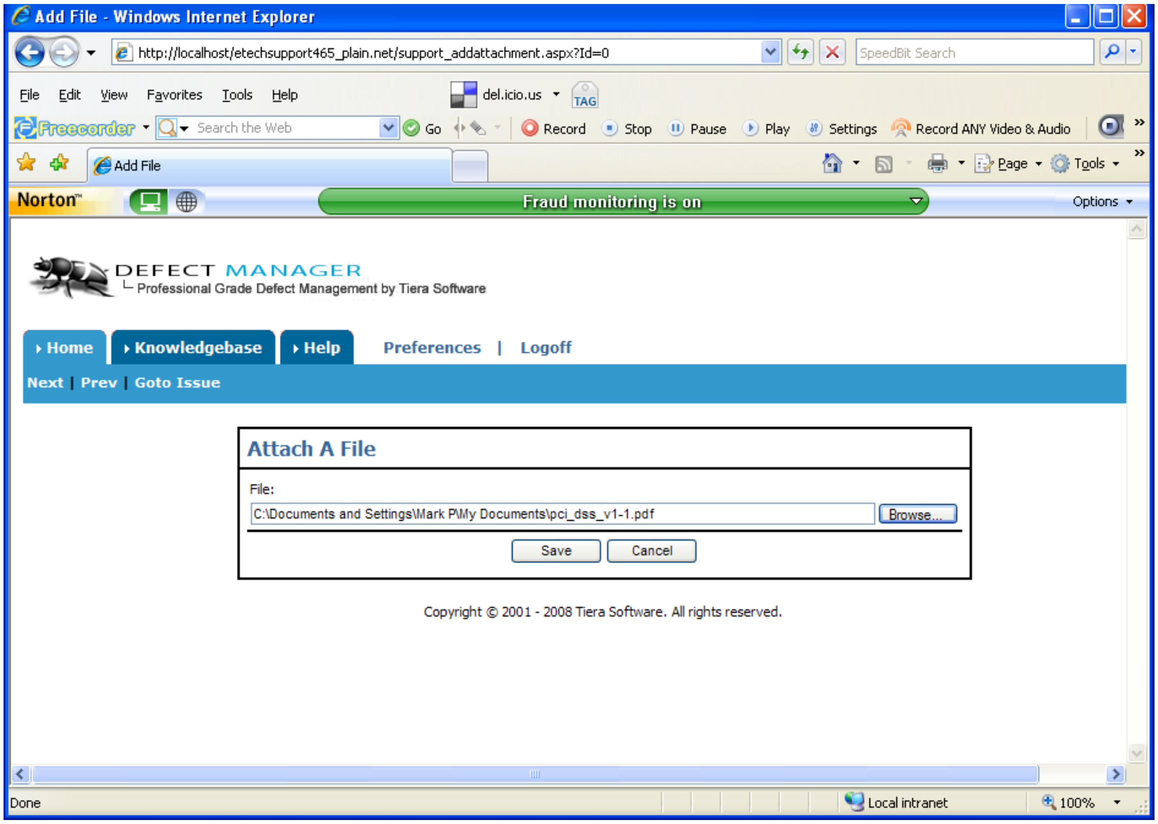

Figure: Add Attachment Form – Complete the Attachment

To add a link attachment, click the **Add Link** button. The following window will be displayed.

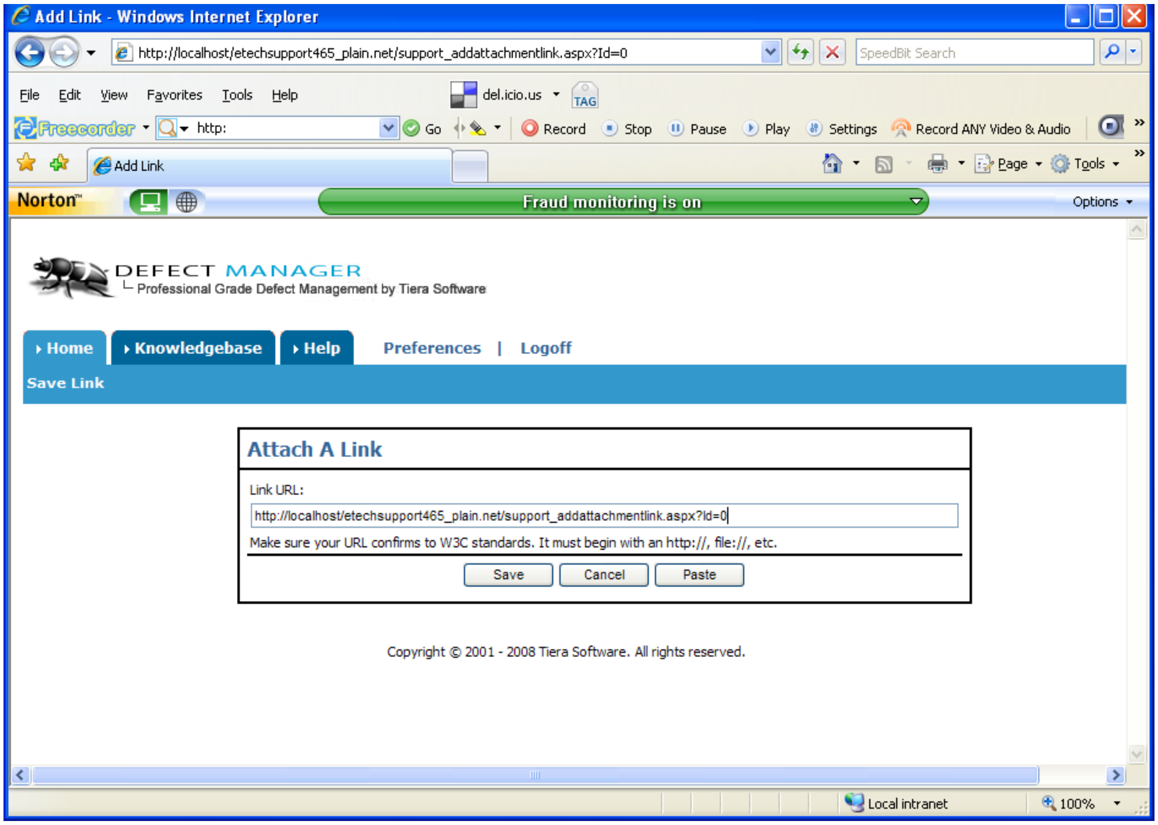

Figure: Add Link Selection Form

To attach the link, enter the URL of the link into the **URL** field and press the **OK** button. If the URL is on the clipboard, you can press the **Paste** button, and the clip board text will be placed into the **URL** field.

To remove an attachment, select the radio button next to the attachments as shown below.

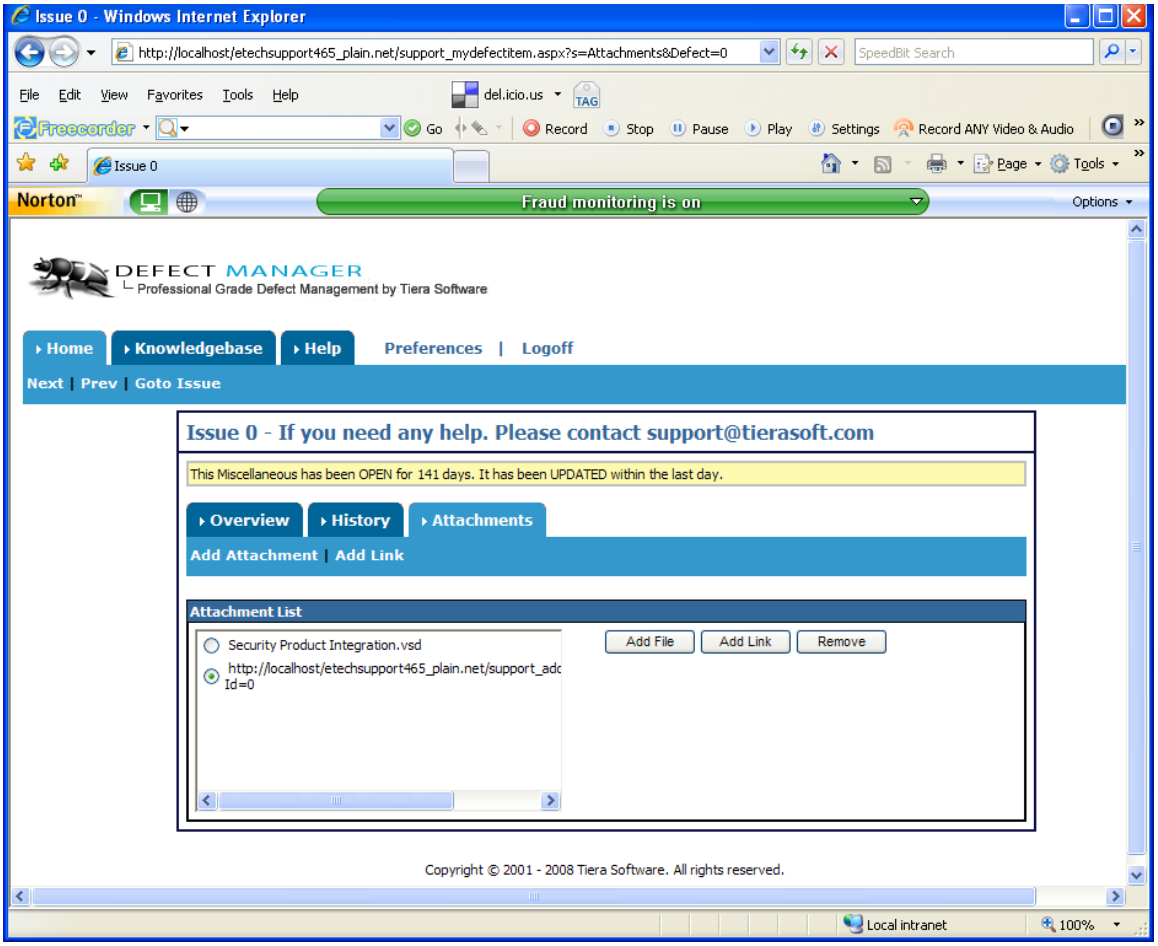

Figure: Remove Attachment Form

Press the **Remove** button to remove the attachment.

Search the Knowledgebase

The web-based Defect Manager Knowledgebase contains selected information published to your supplier's website.

When you encounter a problem, you may search this Knowledgebase for a word or phrase that represents your problem. Perhaps, your problem has already been reported and resolved.

This will allow you to quickly find the problem and its solution – Saving you the trouble of entering a new defect report and waiting for a response when you are able to locate a prior instance of the same problem.

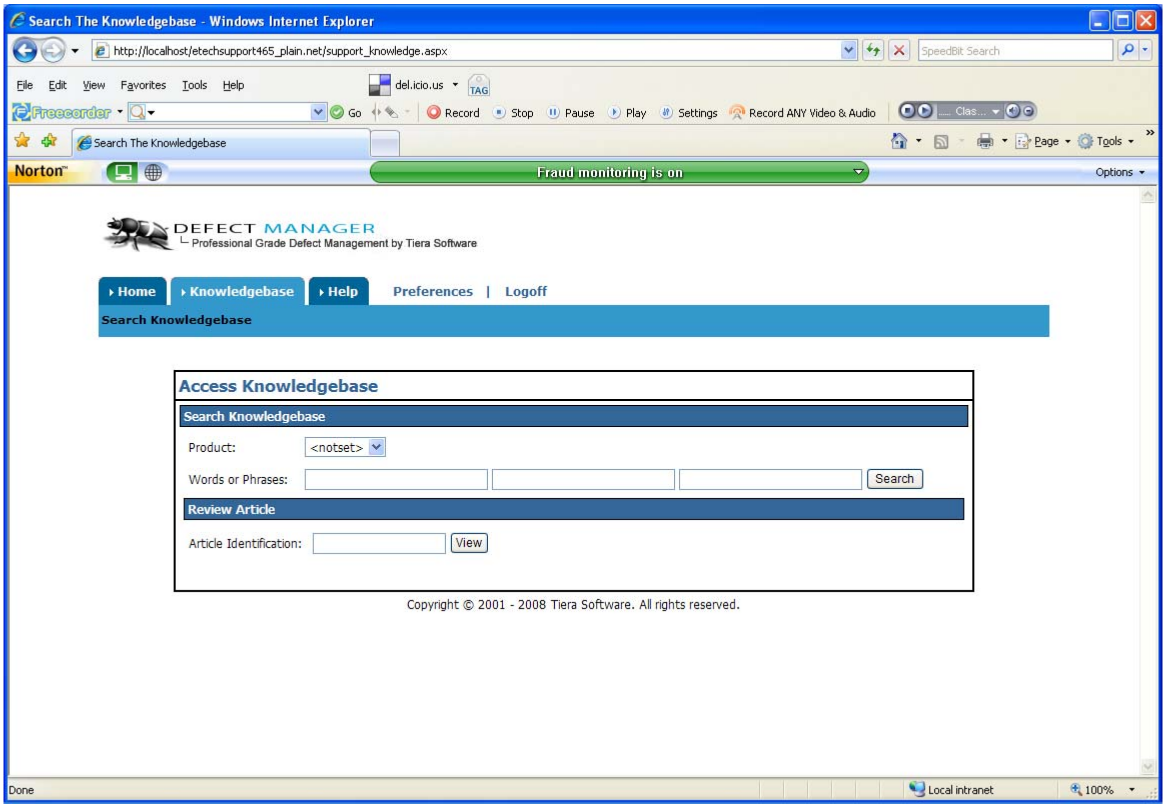

Figure: Search Knowledgebase Web Page

After entering your search values, and clicking the **Search** button, the system will find all issues in the knowledgebase that contain your search values. As shown below

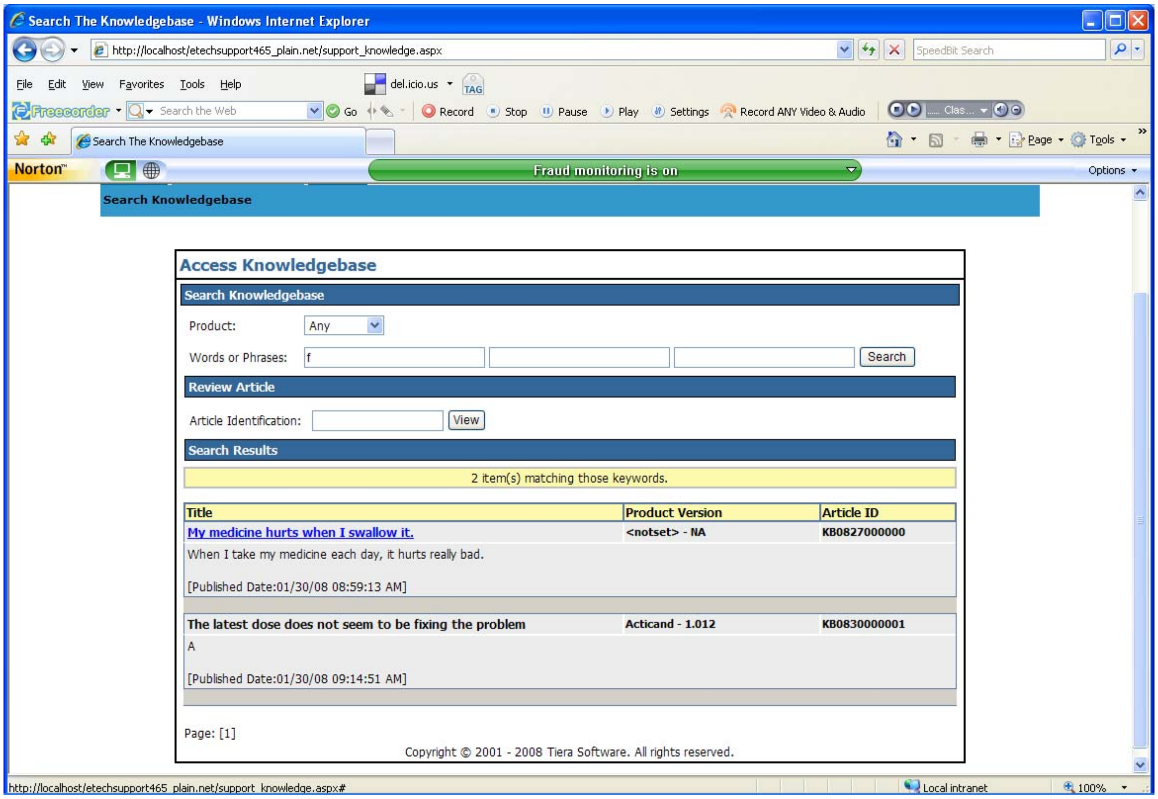

Figure: Knowledgebase Search Results

To view the knowledgebase item, you can select an item by positioning the cursor over the item in the search results list (the item will then be highlighted) and pressing the left-mouse button. The following screen will be displayed.

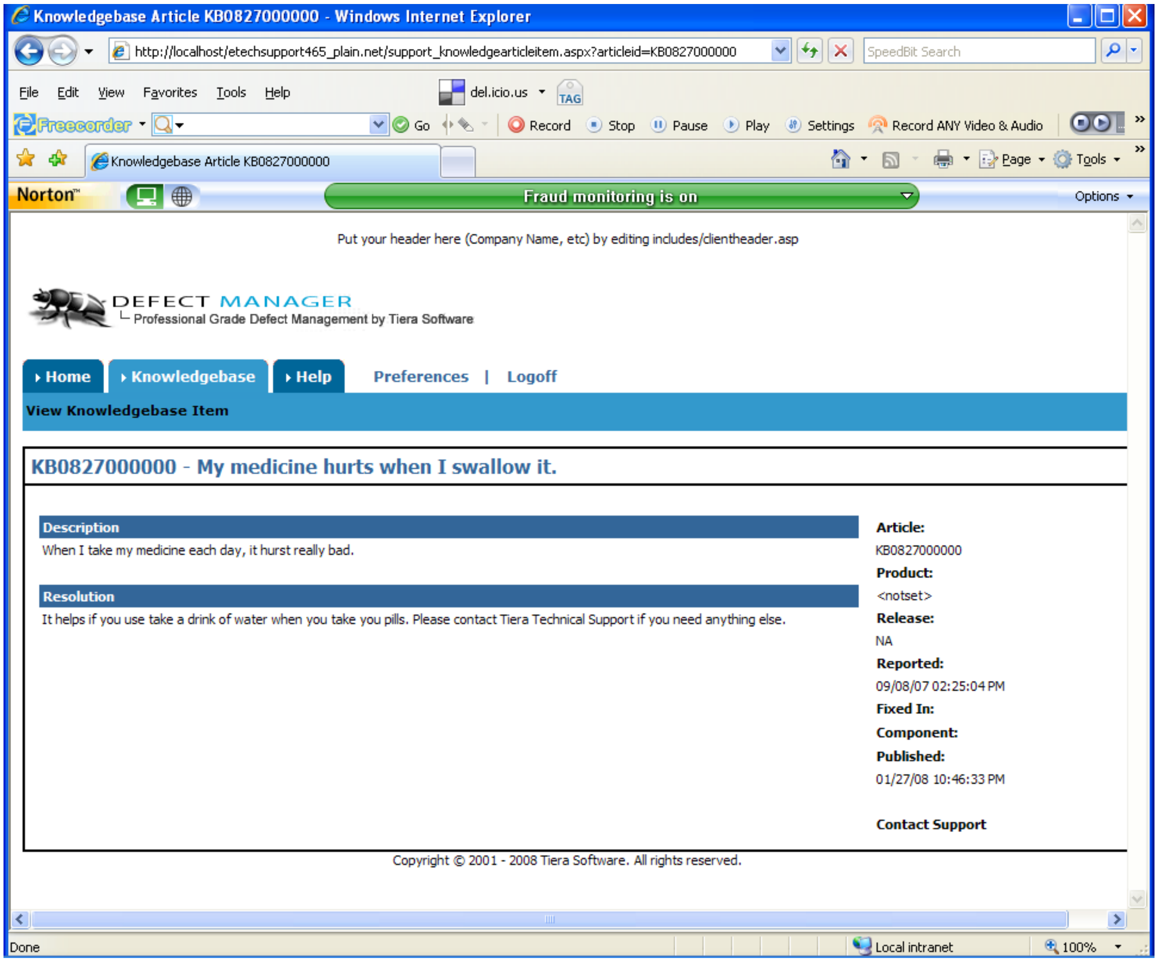

Figure: Viewing The Knowledgebase Item

If the you knew the Article Identication of this knowledgebase item, you could have entered that value in the Article Identification field and press the **View** button to retrieve the specific knowledgebase item as show below.

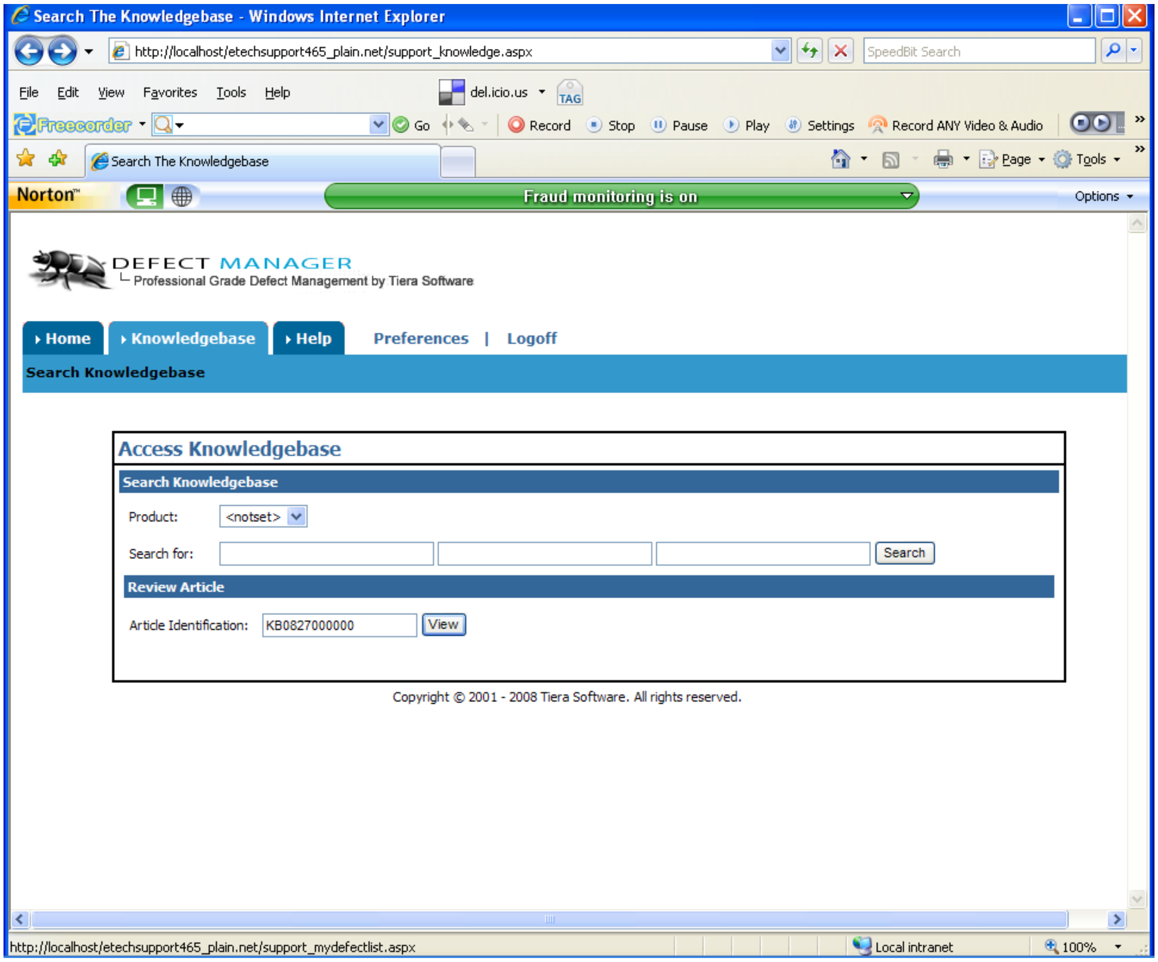

Figure: Viewing The Knowledgebase Item By Article

Exporting Issues

You can export your issue items and those submitted by your organization to other programs such as Excel, Access, etc. by exporting the issues in comma separated values (CSV) or extensible markup language (XML) by clicking the Menu Bar entry: **Export to CSV** or **Export To XML**.

This displays the following form.

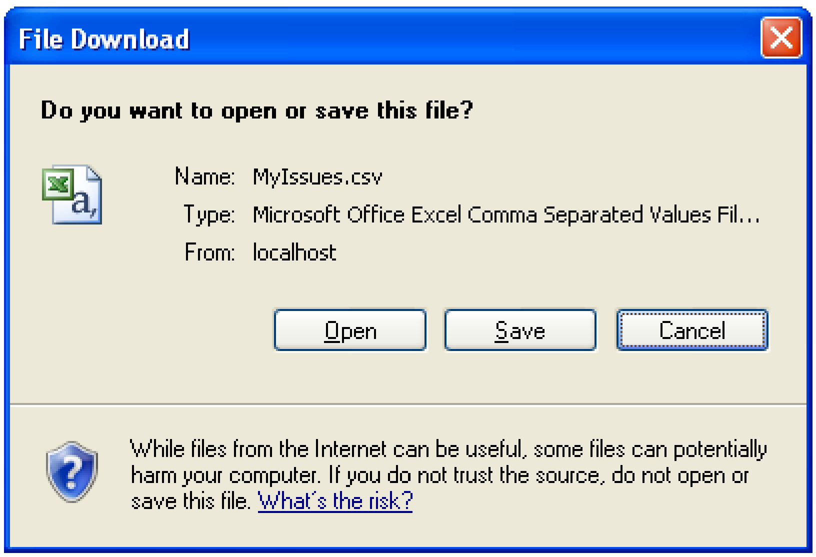

Figure: Export Download from the Defect Manager Repository

Pressing the **Save** button, displays the following form. Be sure to select the proper directory where you wish to save the exported spreadsheet of data. If you select the **Open** button, the system will open the application can show the data.

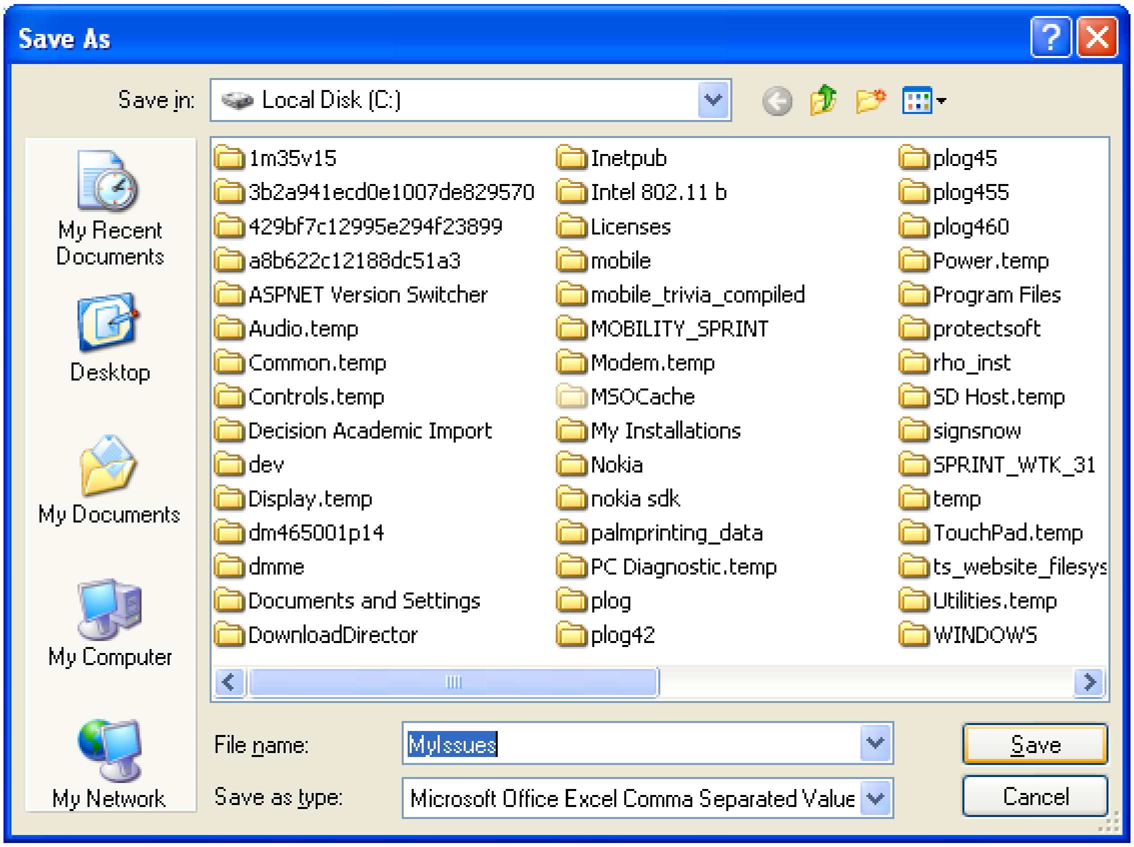

Figure: Saving the Exported Data as an Excel Spreadsheet

Update My Preferences

You can update your user-profile should your phone number or other contact and profile information change, or you want to change the way the system looks. By selecting the **Preferences** option in the menu bar you will see the following form:

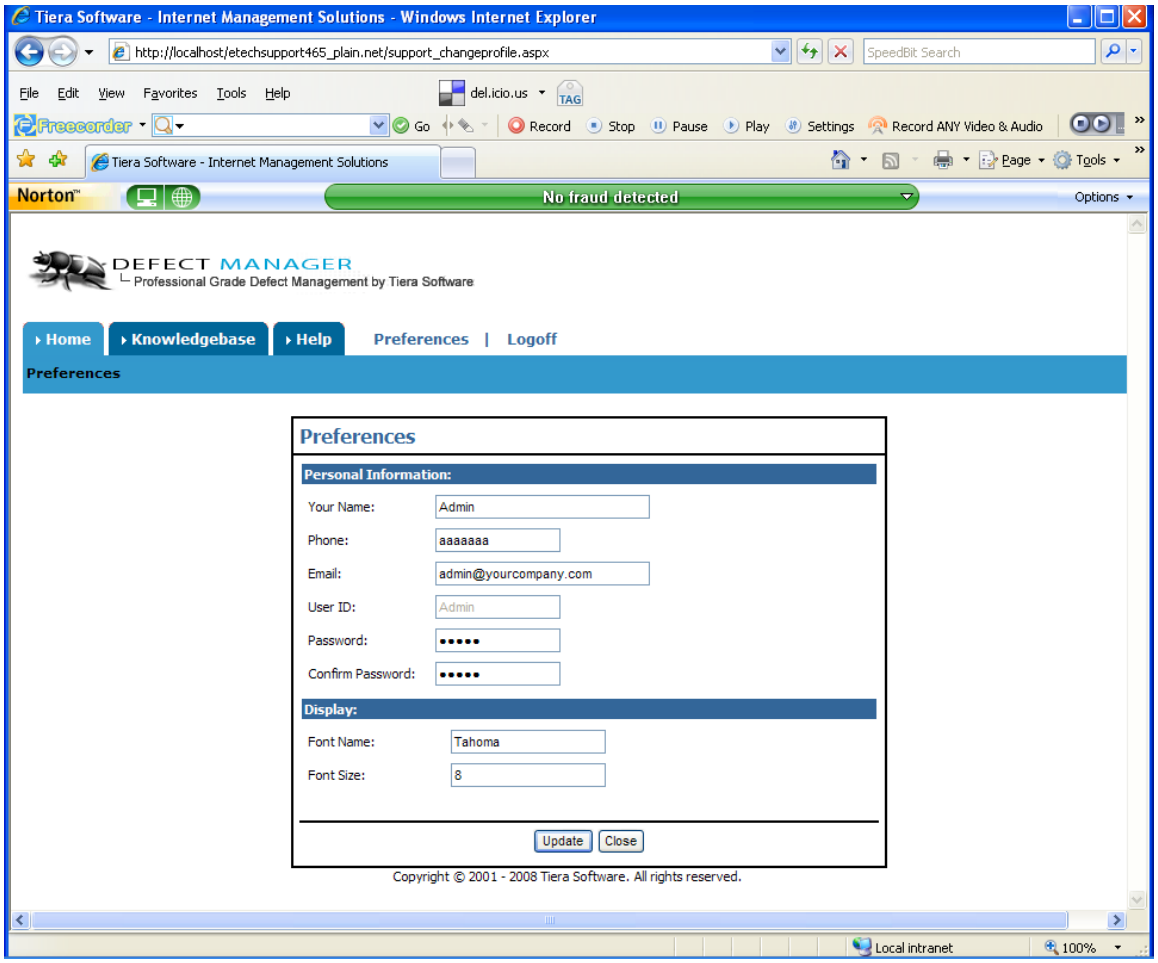

Figure: Initiating an Update of Your Profile in the Repository

This form allows you to change your contact information (Name, Phone, Email), password and the font that the system uses.

Printing Issues

You can print your issue list by clicking the Menu Bar entry: **Print**. The selection of items printed is controlled by the current filter selection on the **Home** web page.

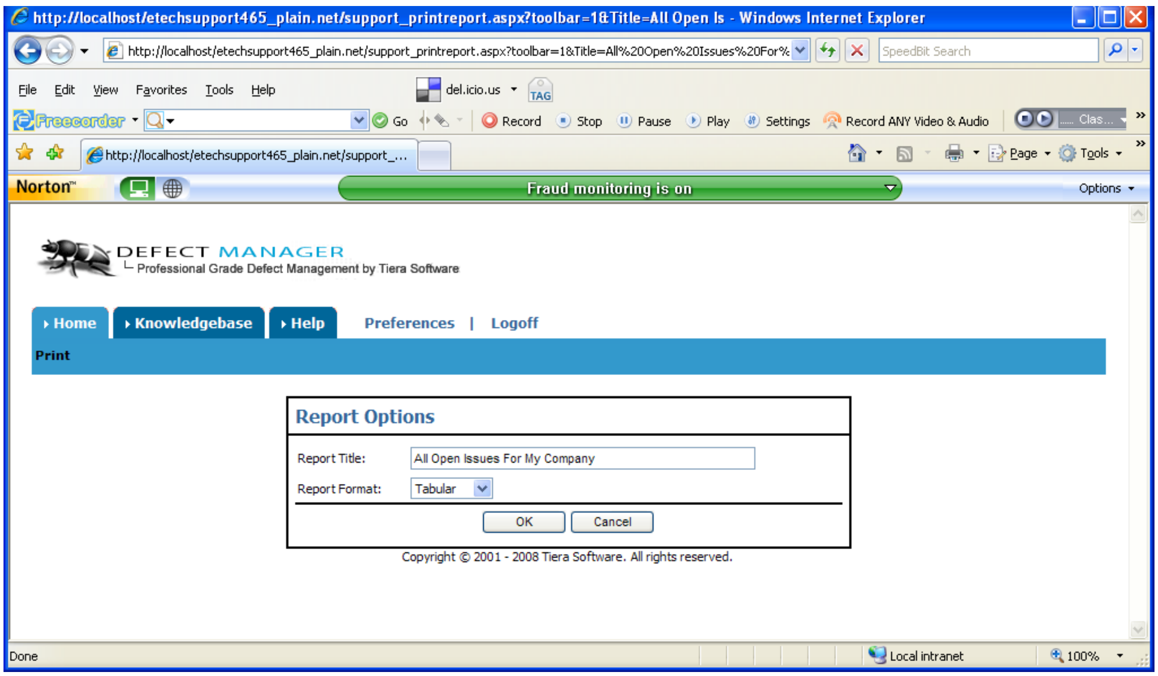

Figure: Print Report Options

Enter the **Report Title** for this report. The current filter name is used as the default report title. Select the **Report Format** for the report. There are three report formats to choose from. They are **Tabular**, **List**, and **Detail List**. Each report format varies in the amount of data that is displayed for each issue item, where the **Tabular** report format provides the lease least amount of information and **Detail List** report format provides the most. Click **OK** when you are ready to have the report created.

E-Tech Support Start-Up Choices

There will be times when you want to have direct access (via a URL) to a specific issue or knowledgebase article.

To view a particular issue, use the following URL:

http://etechsupportURL/?StartId=*issueid*

where issueid is the id of the issue that you want to view. For example to view issue 1055 you would use the following URL:

http://etechsupportURL/?StartId=1055

To view a knowledgebase article, use the following URL:

http://etechsupportURL/?ArticleId=*article*

where article is the article that you want to view. For example to view article KB0827000000, you would use the following URL:

http://etechsupportURL/?ArticleId=KB0827000000