

PR-Tracker for DOS

User Guide

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Introduction

PR-Tracker will help you to manage the development of your product by focusing development effort on the tasks required to bring your project to completion. PR-Tracker does this by recording the defects of a product during the development and maintenance cycle as problem reports and by tracking the process of correcting those defects.

PR-Tracker helps you to manage your project by assisting you to perform these tasks:

- Record defects as problem reports in a network database.
- Assign personnel to perform the tasks required to correct defects.
- Track the tasks of investigating problems, resolving them, and verifying that they have been corrected.
- Categorize problems according to priority and type.
- Determine which testing methods are most efficient in detecting defects.
- Sort and search the database of problem reports for the information you need.
- Estimate the time required to complete the project.
- In addition you may also configure PR-Tracker to suit your company's data collection and workflow needs.

How to read this manual

If PR-Tracker is not installed on your computer, read the *Installation* section for directions on how to install PR-Tracker. Once you have installed PR-Tracker, you can probably start using PR-Tracker without reading any further in this manual, but it is recommended that you at least read from *Starting PR-Tracker* to the end of *Creating a new problem report* and practice using PR-Tracker on one of the demo projects. If you are the project manager or a project lead you should also read the section *Configuring PR-Tracker* because you will need this information to create projects and configure the way PR-Tracker works with them.

Installation

To install PR-Tracker you will need to perform two steps:

1. Install the PR-Tracker database on the network.
2. Install the PR-Tracker program on each workstation that will use it.

Installing the PR-Tracker Database on the Network

The PR-Tracker database should be installed on a network directory that can be accessed by all the users that will be using PR-Tracker. Before installing the database you will need to know where you want to install the database. You can move the location of the database later if you wish. You will also need to know the registration number and license code printed on your license agreement. (If you don't have a license you can still install.) Once you have determined this information, install the PR-Tracker database by performing these steps.

1. Insert the PR-Tracker disk into a floppy drive.
2. Select the drive with the PR-Tracker disk.
3. Run the program INSTALL.EXE.
4. Select the command button INSTALL DATABASE and respond to the prompts.

INSTALL DATABASE also installs the program on the first workstation.

Note: The license agreement only permits you to install one copy of the PR-Tracker database file PRTR.MDB.

Installing the PR-Tracker Program on Workstations

Before installing the PR-Tracker program you should know where on the network the PR-Tracker database was installed. Once you know the drive and path connecting your computer to the database, install the program by performing these steps:

1. Insert the PR-Tracker disk into a floppy drive.
2. Select the drive containing the PR-Tracker disk..
3. Run the program INSTALL.EXE.
4. Select the command button to INSTALL PROGRAM and respond to the prompts.

Note: The license agreement permits you to install the PR-Tracker program on as many computers as you like provided that only authorized users use the program.

Authorizing Users

When you have installed the PR-Tracker database and program, you are ready to authorized people to use PR-Tracker. To authorize users do these steps:

1. Run PR-Tracker by entering PRTR at the DOS prompt.
2. Select the menu item Setup. Another menu will pop down.
3. Select menu item Users. The User Setup dialog will appear. If you are the one who installed the database your name should appear in the User List.
4. Enter the name of a user you want to authorize in the User Name field, select the privileges that you want to give then, and select the Add command button.
5. Repeat step (4) for each user that you want to authorize.
6. When you have authorized the all the users that you want, select the Close command button.

Upgrading Your License

You can increase the number of users authorized to use PR-Tracker by purchasing an upgrade to your license. The upgraded license will specify your new license code which you enter at the License Setup dialog. To enter your new license code perform these steps:

1. From the menu bar select **Setup**. Another menu will pop down. Note: If you don't have setup privilege you will not be able to do this.
2. Select **License** from the popdown menu. The Setup License dialog box will appear.
3. Enter the license code from your License Upgrade Agreement into the License Code field and select the command button **Ok**.
4. A message box will appear to confirm the number of users authorized to use PR-Tracker. Press **Ok**.

Environment Variables

PR-Tracker uses three environment variables which are described below.

- `PRTR_HOME` -- specifies the directory where the problem report database is kept.
- `PRTR_USER` -- specifies the person using PR-Tracker.
- `PRTR_PROJECT` -- specifies the startup project.

When you install the PR-Tracker program using the install program, environment variable settings for `PRTR_HOME` and `PRTR_USER` are added to the `AUTOEXEC.BAT` or `NEWVARS.BAT` file, depending on the option you choose during installation. You have to set `PRTR_PROJECT` yourself. If you don't set this environment variable PR-Tracker will prompt you for the project each time you start PR-Tracker. If you want PR-Tracker to start with a default project, set `PRTR_PROJECT` equal to one of the projects listed in the **Select Project** dialog. If you set `PRTR_PROJECT`, you can still change to one of the other projects after starting PR-Tracker.

If you didn't install PR-Tracker using the installation program, you will have to set `PRTR_HOME` and `PRTR_USER` yourself. Set `PRTR_HOME` equal to the directory that has the PR-Tracker database. This directory will contain the file `PRTR.MDB` and one directory for each project. Set `PRTR_USER` equal to your full name.

Using PR-Tracker from Windows

PR-Tracker may be used from Windows. An icon has been supplied for this purpose. The steps below describe how to configure Windows so that you can run PR-Tracker in its environment. The directions assume the PR-Tracker program has been installed in the C:\PRTR directory and that you want to invoke PR-Tracker from Accessories program group. If you installed PR-Tracker in a different directory or you want to invoke PR-Tracker from a different program group, make the appropriate substitutions as you follow the directions.

1. Start Windows.
2. Select the Accessories program group.
3. From the Program Manager menu select File. Select New from the popdown menu. The New Program Object dialog will appear.
4. Select option Program Item and press command button OK. The Program Item Properties dialog will appear.
5. Type "PR-Tracker" in the description field and C:\PRTR\PRTR.EXE" in the Command Line field. Leave the Working Directory blank.
6. Press command button Change Icon. The Change Icon dialog will appear. Press OK. Another Change Icon dialog will appear.
7. Enter "C:\PRTR\PRTR.ICO" in the File Name field. Press command button OK. The PR-Tracker icon will appear. Press OK again.
8. In the Program Item Properties dialog, press OK. The PR-Tracker icon will now appear in the Accessories program group.

To invoke PR-Tracker from Windows simply double click the icon.

Starting PR-Tracker

To start the PR-Tracker program, type PRTR at the DOS command prompt. If you have installed PR-Tracker correctly the program will start.

If the PRTR_PROJECT environment variable is not set the Select Project dialog will appear when the program starts. Pressing command button OK will select the first project. If you want to select another project press ↓ until you get to the desired project, then press OK. If the PRTR_PROJECT environment variable is set to valid project, the Select Project dialog will not appear. Instead the problem list for the startup project will be displayed.

Viewing the Problem Report List

When PR-Tracker is started a summary of the first 22 problem reports is listed on the screen. There is one problem report summary per line. A problem report summary contains the following information (listed from left to right).

- The problem report number.
- A single letter which specifies the status of the problem report. The status may be New, Assigned, Postponed, Investigated, Resolved, Verified, Failed, or Closed.
- An integer indicating the priority of the problem report.
- The title of the problem report.
- An attachment indicator. If there is an attachment to the problem report an “A” will be displayed in this field; otherwise it will be blank.
- A notification indicator. If customers must be notified of this problem an “N” will be displayed in this field; otherwise it will be blank.
- The last field is the date that the problem report was last modified.

The problem list is sorted according to the problem report number. It may also be sorted according to status, priority, or last modification date.

In the Problem List, one problem report is highlighted. Throughout this manual the highlighted problem report will be referred to as the *selected* problem. You can change the selected problem in the following ways.

- Press the `←` or `→` key to select the next or previous problem report in the list.
- Press `PGUP` or `PGDN` to see the next or previous page of problem reports.
- Press `HOME` or `CTRL-PGUP` to move to the first problem report, and `END` or `CTRL-PGDN` to move to the last.
- Mouse click the problem report summary that you want to select (a double click will let you view the problem report).
- On the right side of the problem list there is a scroll bar. With the mouse drag the scroll cursor to the bottom to select the last problem report. Drag it to the top to select the first problem report. Dragging to the middle will take you to the middle of the problem list, and so on.

Viewing Problem Reports

To view a problem report select the problem report in the problem list. Then from the menu select `View` (or double click the problem summary). The Problem Data and Problem Description will be displayed.

To see the problem investigation, resolution and verification, press `tab` repeatedly. Each time `tab` is pressed new information is displayed in the edit window. You may also select this information by selecting menu item `Window` followed by a section of one of the submenus.

If you want to see more of the problem description you can enlarge the edit window in three different ways:

1. Press `ctrl+m`. Pressing `ctrl+m` again minimizes the edit window.
2. From the `Window` submenu select `MinMax`. Selecting `MinMax` again minimizes the edit window.
3. Drag one of the upper corners of the edit window upward.

To view the next problem report in the problem list select menu item `Next`. To see the previous problem in the list select `Previous`. To print a problem report select `Print`. To go back to the Problem List select menu item `List`.

Editing Problem Reports

To edit a problem report select EditPR from the menu. (The EditPR menu item is available when viewing the Problem List or a problem report.) A popdown menu will appear which shows the edit operations that can be performed. You can either create a new problem report or you may assign, postpone, investigate, resolve, verify, fail, close or modify an existing problem report.

Note that some of the items on the popdown menu are gray and some are black. When a menu item is gray it means the operation is disabled. All operations in this submenu apply to the *selected* problem report except for New. The New operation is always enabled but the other operations will be enabled or disabled depending on the *selected* problem reports status and the project workflow configuration.

Creating a New Problem Report

To enter a new problem report select New from the EditPR submenu. A problem report form will appear on the screen.

When the problem data form first appears on the screen the cursor will be positioned in the title field. Type a brief description of the problem in this field. When you are done, press TAB to move on to the next field. If you want to go back to the title field, press shift+tab or mouse click the title field with the mouse.

Your name should be automatically entered in the originator field, so tab past it unless you want to change it.

When you tab to the priority field it will be automatically filled in with the first choice. If you want to know all the choices, press CTRL+↓ (or mouse click the ↓ on the right edge of the field) and a list box containing the choices will appear. To select the choice you want from the list, press ↓ scroll to the desired choice and then press ENTER (or mouse click your choice). When you have made your selection, tab to the next field.

The problem type and detection method fields work the same way as the priority field. Once you are familiar with the choices, you may enter your choice quickly by typing the first character of your choice and it will be automatically entered. If there is more than one choice beginning with the same letter, type the letter repeatedly until you get to the choice. When you have made your selections, tab to the next field.

The Notify Customer check box only applies to software that has been released to a customer. It can help you to provide the customer with a list of known bugs if this is part of your maintenance program. You can check (or uncheck) this box by pressing the space bar or by clicking the box with your mouse. When you have made your decision, tab to the next field.

The **Attachment** check box is used to indicate that there is information that cannot be incorporated into this problem report format, such as a photograph, graphic output, or a file that is not a text file. When you have made your decision, tab to the next field.

In the problem description edit window, describe the problem in detail. When you are in this window the **Edit** menu becomes enabled allowing you to copy, cut, paste, and delete blocks of text. These operations require you to select text in the edit window. To select text with the keyboard, move the cursor to the starting text, then hold down the shift key and move the cursor with to the end of the text that you want to select. You may also select with the mouse. To select with the mouse press the right mouse button down with the mouse pointer positioned over the start of text, with the mouse button down drag to the end of text and release the mouse button. The **Edit** menu also enables you to paste a file into the problem description.

If you want to make the problem description window bigger from the **Window** submenu select **MinMax**; do the same to restore the window to its normal size. You may also resize the problem description window by dragging one of the top corners with the mouse in the upward direction. When you are done entering data, select **Save** from the menu. The problem data will be saved in the database.

Assigning Problem Reports

Before a problem report can be closed, there are three tasks that must be performed; investigation, resolution, and verification. The assign step assigns these tasks to different team members. To assign a problem report select it in the **Problem List** window. From the **EditPR** submenu select **Assign**; the problem report data will be displayed and the cursor will be positioned in the investigator field.

Enter the name of the person that you want to investigate the problem. If you would like to choose from a list of names, press the ↓ key and a list of names will appear. Next press the first letter of the name you desire repeatedly until you get to the name you want. When the desired name is highlighted, press **ENTER** to make your selection. Tab to the next field.

Next enter the number of hours you estimate will take to investigate the problem. Tab to the next field.

Note that the resolution task was automatically assigned to the investigator. You can change this if you want. Tab to the next field.

Now enter the number of hours you estimate it will take to resolve the problem. This estimate can be refined later after the investigation step. Tab to the next field.

Note that the verification task was automatically assigned to the problem report originator (Automatic assignment may not occur, depending on the workflow configuration). You can change this if you want. Tab to the next field.

Enter the number of hours you estimate it will take to verify the problem. Tab to the next field. The cursor will be positioned on the priority field. You may change the priority of the problem report at this time if you want. When you are satisfied with all your entries, save them in the database using the menu command **Save**.

Investigating Problem Reports

To investigate a problem first select the problem you want to investigate from the Problem List. From the EditPR submenu select **Investigate**. The problem report data will appear with the cursor positioned on the Actual Hours field for the investigation task.

Enter the number of hours the investigation required. Tab to the next field.

During the course of investigation you may have developed a more accurate estimate of the amount of time required to fix the problem report. If you would like to change the estimated time required to resolve the problem report do it. Tab to the next field.

If you want to change the estimated amount of time required for verification, do it. Tab to the next field.

In the Problem Investigation edit window, describe the information collected during your investigation. This may include whether or not the problem is reproducible in the current version and a list of the modules that will have to be modified to resolve the problem.

When you are satisfied with all your entries, save them in the database using the menu command **Save**.

Resolving Problem Reports

To resolve a problem first select the problem you want to resolve from the Problem List. From the EditPR submenu select **Resolve**. The problem report data will appear with the cursor positioned on the Actual Hours field for the resolution task.

Enter the number of hours the resolution required. Tab to the next field.

If you want to change the estimated amount of time required for verification, do it. Tab to the next field.

In the Problem Resolution edit window, describe what you did to resolve the problem. This may include a list of the modules that changed and what revisions the changes were completed in. You should also specify what system version in which changes were incorporated so that the person verifying the software checks a version that has the changes.

When you are satisfied with all your entries, save them in the database using the menu command **Save**. Depending on the project workflow configuration, PR-Tracker may ask you if you want to close the problem report in addition to resolving it. If you want to close the problem report, select **Yes**; if you want to verify and close the problem report with a separate transaction, select **No**. See the section on *Workflow Setup* for more information.

Verifying Problem Reports

To verify a problem first select the problem you want to verify from the Problem List. From the EditPR submenu select **Verify**. The problem report data will appear with the cursor positioned on the Actual Hours field for the resolution task.

Enter the number of hours the verification required. Tab to the next field.

In the Problem Verification edit window, describe what you did to verify that the problem was fixed. This may include the system version that was tested and a test case that failed.

When you are satisfied with all your entries, save them in the database using the menu command **Save**. Depending on the project workflow configuration, PR-Tracker may ask you if you want to close the problem report in addition to verifying it. If you want to close the problem report, select **Yes**; if you want to close the problem report with a separate transaction, select **No**. See the section on *Workflow Setup* for more information.

Closing Problem Reports

To close a problem report first select the problem report you want to close from the Problem List. From the EditPR submenu select **Close**. The problem report data will appear with the cursor positioned on the Closed by field.

The closer and close date are entered for you automatically, but you can change them if you want.

When you are satisfied with all your entries, save them in the database using the menu command **Save**. If you don't want to close the problem report, **Cancel** the transaction and regress its status to the desired state using the EditPR operation **Modify**.

Modifying Problem Reports

If you want to modify a problem report without advancing its status, choose **Modify** from the EditPR menu. The problem report will be displayed. During this edit operation you can modify any of the fields except the problem report number. This includes the status. However, the status can only be modified to a regressed state. You have to use the other EditPR operations to advance the status.

Sorting and Selecting Problem Reports

When PR-Tracker is started all the problems for the given project are listed -- sorted by problem number. The problem reports may also be sorted according to status, priority, or last modification date, be reduced to a set of problems with certain properties, or both. To sort or select a subset of problems, select menu item **Select**. The **Select and Sort** dialog will be displayed. You can move to the different text or checkbox fields in the dialog by tabbing, clicking with the mouse, or with the shortcut keys.

Sorting Problem Reports

At the bottom of the dialog is the **Sort By** field. Select it by clicking the field with the mouse or by tabbing to it. Press the key repeatedly until "Status" is displayed. Select the **Ok** command button. The problem list will be displayed sorted by status.

Sorting problems by priority or last modification date is done in a similar fashion.

Selecting Problem Reports

If you want to see a subset list of problems that matches a set of criteria that you specify, select menu item **Select** from the problem list menu. The **Select and Sort** dialog will appear.

This dialog contains several checkboxes. When a checkbox is checked it will have an "X" between the left and right brackets. You can check or uncheck a checkbox three ways:

1. Click the checkbox with the mouse.
2. Tab to the checkbox and press **SPACE**.
3. Type the shortcut key. For example, to check PRs originated by: type **ALT+A**.

Selecting problems according to status

To select problem reports according to status click the status checkboxes that correspond to problems that you want to select. For example, to view all new problem reports check **New**. Note that both **New** and **PRs with status** are checked. Now press **Ok**. A list of only new problems is displayed.

To view all problem reports except those that are closed choose **Select** to display the **Select and Sort** dialog. Press the **Select All** command button to clear the previous selection. Next check **Close**. Then press **Invert**. Press **Ok**. A new problem list will be displayed containing only problem reports that are not closed.

Selecting problem reports according to assignment

Check [] PRs assigned to: Your name will be automatically filled in to the text field. If you want to change the name, do it. If you would like to choose from a list of names press ; type the first letter of the name you want repeatedly until it is selected; press ENTER.

If you press Ok now all problem reports assigned to the selected person will be listed in the Problem List, whether the assignments have been completed or not. To see only those problem reports that need work, check [] and that need work, then press Ok.

Selecting problem reports according to originator

To select all problem reports that have been originated by a person, check [] PRs originated by: Your name will be automatically entered in the text field.

If you want to select all the problem reports originated by someone else, change the name. If you would like to choose from a list of names press ; type the first letter of the name you want repeatedly until it is selected; press ENTER.

Press Ok. The Problem List will be displayed and will contain only those problem reports originated by the specified person.

Selecting problem reports according to priority

To select only problem reports with high priority, check [] PRs with priority at least as high as: Tab to the priority field. The top level priority will be entered automatically. Press the key repeatedly until the lowest priority that you want to see is displayed. Press Ok.

Selecting problem reports according to type

To select problem reports that have a certain problem type check [] PRs of type: Tab to the next field. A problem type will automatically be entered. To select a different problem type, press CTRL+ and a list of problem types to select from will appear. Scroll through the list with the key and press ENTER when the desired choice is highlighted. Press Ok and a problem list will be displayed containing only problem reports with the specified problem type.

Selecting problem reports that contain a string

To select problem reports that contain a certain string in a title, check [] PR contains string: Tab to the text field and type the string. Press Ok to list the problem reports.

If you want to search the problem report description, investigation, resolution, and verification text for the string, check [] or in text in addition. Then press Ok.

Searching for a string in problem report text can take a long time if there are lots of problem

reports. You can speed up the search by specifying additional selection criteria.

Selecting problem reports satisfying multiple criteria

You may reduce the subset of problem reports more by specifying more than one search criterion. If you specify multiple selection criteria then a problem report must match all of the selection criteria to be selected.

For example, to select all problem reports that are not closed and with priority greater than 2, do these steps.

- Check Closed.
- Press command button Invert
- Check PRs with priority as high as:
- Tab to next field and enter 2
- Press command button Ok

Selecting all problem reports

If you have selected a subset of problem reports and want to go back to displaying all problem reports, from the Select on Sort dialog press command button **Select All**. This will cause all checkboxes and text fields to be cleared. Press **Ok** to display the problem list.

Printing Problem Reports

Problem report can be printed individually, or in groups. To print an individual problem report select it from the Problem List. Select the menu item View and the problem data will be displayed. Select menu item Print. The Print Problem Report dialog will appear. Select the print destination and then press ok. If you select file as the print destination you will have to enter a file name.

To print a group of problem reports select Reports from the Problem List menu. The Reports dialog will appear. From this dialog you can elect to print all selected problem reports or any group of consecutively numbered reports. For information on how to use this dialog see the section on generating reports.

Selecting a Project

With PR-Tracker you can keep track of problems for more than one project. If you want to view the problems of another project, select **Projects** from the problem list menu. The Select Project dialog will appear. To select a project do one of these things:

- Double-click to desired project from the project list.
- Highlight the desired project with a mouse click and then click Ok.
- Use the ↓ and ← keys to move the highlight to the desired project. Then press enter.
- Repeatedly type the first letter of the project until it is highlighted. Then press enter.

Generating Reports

PR-Tracker enables you to generate several useful reports. To generate one or more reports do these steps.

- Select Report from the Problem List menu. The Reports dialog will be displayed.
 - Check the reports that you want to be printed.
 - Press the command button Print. The Print Report dialog will appear.
 - Select the printer or file where you want to output the report. You can select an option with a mouse click or a shortcut key
 - If you chose file, enter the file name that you want the reports sent to.
 - Press command button Ok. The reports will be printed.
 - Press the Close button in the Reports dialog to return to the Problem List.
- The following section describes the reports that PR-Tracker can generate for you.

Status Summary Report

The Status Summary report provides statistics on the number of open problem reports. The open problem reports are broken down by status and priority.

Work Remaining Report

The Work Remaining report calculates the number of hours required to close all assigned problem reports. The work remaining is summarized according to the tasks of investigation, resolution, and verification and according to priority. Work remaining on problem reports with status new are not included in this report, so it is best if all new problem reports are assigned before generating this report.

Transaction Log Report

The Transaction Log report is a list of all transactions that have occurred between two dates. Transactions include originating [creating a new], assigning, postponing, investigating, resolving, verifying, failing, closing, and modifying reports.

Each transaction entry lists the date, time, problem report number, transaction, and person performing the transaction. One thing that you can use this report for is to determine what work has been done this week.

Detection Statistics Report

The Detection Statistics report lists how many problems were detected by each test method, and what the priority break down is. This report lets you know which test methods are most effective in detecting errors. If you track the number of hours spent doing each kind of testing you will have a better idea about how effective these methods are.

Reports Of Problems

This report provides all the details of a consecutively numbered set of problem reports. When the Reports dialog is first displayed the first report number field is 1 and the last report number field is the total number of problem reports.

Reports Of All Selected Reports

This report provides all the details for all the reports listed in the Problem List. The problems listed in the Problem List may be changed from the Select and Sort dialog as described in the section titled *Sorting and Selecting Problem Reports*.

List of All Selected Reports

This report provides the summary information for all the problems listed in the Problem List. The summary information is the information shown in the Problem List. The reports listed in the Problem List may be changed from the Select and Sort dialog as described in the section titled *Sorting and Selecting Problem Reports*.

Configuring PR-Tracker

There are several ways that you may configure PR-Tracker to suit your companies needs. All of the configurable functions of PR-Tracker are accessible from the Setup menu. In order to perform setup operations you must have setup privilege. The user who installs the PR-Tracker has setup privilege. When users are added to the list of authorized users, the person who adds them determines whether or not they have setup privilege. With setup you can perform the following operations:

- Increase the number of authorized PR-Tracker users.
 - Add and delete users from the authorized user list.
 - Add and delete project databases.
 - Specify the allowable problem report priority values for each project.
 - Specify the allowable problem types for each project.
 - Specify the allowable detection methods for each project.
 - Specify data entry templates for each project.
 - Specify the workflow configuration for each project.
- This section describes how to perform all of the above functions except for increasing the number of authorized users and adding and deleting authorized users. For a description on how to perform these operations, see the *Installation* section.

Adding and Deleting Projects

PR-Tracker allows you to organize your problem reports under multiple projects, each having their own database. When PR-Tracker is shipped, it comes with two project databases that you can use to learn PR-Tracker: DEMO1 and DEMO2. In order to start using PR-Tracker to track your problems you will have to add your own project.

To add a project perform these steps:

1. Select Setup from the menu bar. A drop down menu will appear.
2. Select Projects. The Setup Projects dialog appears.
3. Enter the name of your project in the Project Name field.
4. Select the Add command button. Your project is added.
5. Select the Close command button. The Setup Projects dialog will close and the problem list for the new project is displayed. Unless you are adding a previously deleted project there will be no problems in the list.

To delete a project perform these steps:

1. Select Setup from the menu bar. A drop down menu will appear.
2. Select Projects. The Setup Projects dialog appears.
3. Enter the name of the of the project that you want to delete in the Project Name field. One quick way to do this is to click the project name in the Existing Projects list box.
4. Select the Delete command button. The project will be deleted from the list.
When a project is deleted the name is removed from the existing projects list; however, no files are removed. If you want to delete the project files you will have to do it manually. The files are located in a subdirectory of the directory specified by your PRTR_HOME environment variable. This subdirectory will have the same name as the project.

Restoring a previously deleted project

If a project has been deleted you can restore the project as long as you have not manually deleted the project files. To restore the project perform the same steps as required to add a project.

Priority Setup

When entering problem reports, you will want to specify the importance of a problem report by giving it a priority. PR-Tracker has recommended priority categories, but you can change them to suit the needs of each project. The priorities recommended by PR-Tracker are as follows.

- 1 Blocking -- this is a problem that must be fixed immediately because it is blocking work on the project.
- 2 Critical -- this problem may result in damage such as loss of significant data or worse. It must be fixed before the product is shipped.
- 3 Major -- this problem is a major functional defect and must be fixed before the product is shipped.
- 4 Minor -- this problem is a minor functional defect that should be fixed before the product is shipped; however, fixing this problem can be omitted in order to meet deadlines.
- 5 Trivial -- anything less important than minor.

To change the priorities used by PR-Tracker do these steps:

1. Select Setup from the menu bar. A popdown window will be displayed.
2. Select Priorities from the popdown menu. The Setup Priorities dialog will appear.
3. Enter a description into the text boxes for each priority number that you want to use. If you don't want to use a priority, leave the text box blank.
4. To enable the new priorities press Ok. To restore the old priorities press Cancel.

Problem Type Setup

Problem types are used to classify problems into categories that can be used to for searching or to determine who should work on the problem. There are several schemes that can be used to classify problems. PR-Tracker provides default problem categories, but you will probably want to specify your own.

To add problem types do these steps:

1. Select **Setup** from the menu bar. Another menu will popdown.
2. From the popdown menu select **Problem Types**. The **Problem Types Setup** dialog will appear.
3. Enter the name of a problem the **Problem Type** field.
4. Press the **Add** command button. The problem type will be added to the list of problem types.

To delete problem types do these steps:

1. Select **Setup** from the menu bar. Another menu will popdown.
2. From the popdown menu select **Problem Types**. The **Problem Types Setup** dialog will appear.
3. Enter the name of the problem type that you want to delete **Problem Type** field. A quick way to enter the problem type is to click the problem type in the list of problem types.
4. Press the **Delete** command button. The problem type will be deleted from the list of problem types.

Detection Method Setup

Specifying how defects in your product are detected will help you to determine which validation methods are best suited for detecting bugs. PR-Tracker refers to the ways problems are detected as detection methods. PR-Tracker has default detection methods but you can change these to suit the needs of each project.

To add detection do these steps:

1. Select Setup from the menu bar. Another menu will popdown.
2. From the popdown menu select Detection Methods. The Detection Methods Setup dialog will appear.
3. Enter the name of a detection method in the Detection Method field.
4. Press the Add command button. The detection method will be added to the list of detection methods.

To delete problem types do these steps:

1. Select Setup from the menu bar. Another menu will popdown.
2. From the popdown menu select Detection Methods. The Detection Methods Setup dialog will appear.
3. Enter the name of the detection method that you want to delete in the Detection Method field. A quick way to enter the detection method is to click the detection method in the list of detection methods.
4. Press the Delete command button. The detection method will be deleted from the list.

Workflow Setup

In default workflow configuration PRs are processed in 6 steps: origination, assignment, investigation, resolution, verification, and closer -- with the investigation step being optional. This workflow configuration is intended for projects that need to be strictly monitored. Your project may not require as much control and it may be preferable to reduce the number of steps to process a problem report.

PR-Tracker allows you to configure the workflow of each project. You may setup the workflow configuration to require as few as 2 steps, or as many as 6 steps to process a problem report. Furthermore, you may change the workflow configuration for a project at any time.

To specify the workflow configuration do these steps:

1. Select Setup from the menu bar. Another menu will popdown.
2. From the popdown menu select Workflow. The Workflow Setup dialog will appear.
3. Make your selections.
4. Select the Ok command button to activate your choices.

Workflow Options

Workflow setup also allows you to specify the number of steps required to process a problem report. The available options and an explanation of what they are follow:

Allow work on PRs before assignment

The default operation of PR-Tracker is to require problem reports to be assigned before work may progress in problem reports. If you want to allow work to progress before assignment, check this option.

Require PRs to be Resolved, Verified and Closed in separate steps.

This is part of the default workflow configuration. It requires that PRs be resolved, verified and closed in separate steps. This configuration is best for projects that require independent verification and sign-off by management.

Automatically Close PRs when they are Resolved

When this option is in effect, PR-Tracker asks the user if they want to close the problem report at the end of the resolve step. If the user agrees, the problem report is closed; otherwise the problem report status will be RESOLVED and it will have to be verified in order to be closed. This workflow configuration is best for small projects where developers may be verifying the PRs that they fix. At the same time it allows a problem report to be resolved and verified in separate steps.

Automatically Close PRs when they are Verified

When this option is in effect, PR-Tracker asks the user if they want to close the problem report at the end of the verify step. If the user agrees the problem report is closed; otherwise the problem report status will be VERIFIED and it will have to be closed in a separate step . This workflow configuration is best for small projects where independent test is required, but not sign-off from management.

Template Setup

If you would like to collect standard data in problem reports for which PR-Tracker does not provide data entry fields, you can do this by using templates. A template causes standard text to be automatically entered into the edit window of the problem report form.

The edit window collects four kinds of data: the problem description, the problem investigation, the problem resolution and the problem verification. You may provide a template for each kind of information.

To create a template do these steps:

1. Select **Setup** from the menu bar. Another menu will popdown.
2. From the popdown menu select **Templates**. The **Template Setup** dialog will appear.
3. The **Description** option will be selected at this time. In the edit window below, enter the standard text that you want inserted into the problem description each time a user enters a problem report.
4. Next select the **Investigation** option. Enter the standard text for the problem investigation (if any). Do the same for **Resolution** and **Verification**.
5. Select the **Ok** command button to save your templates.

PR-TRACKER LICENSE UPGRADE ORDER

REGISTRATION NUMBER _____ LICENSE CODE _____

Price	Qty.	Subtotal		
Licensed Users	\$50.00 ea	_____	_____	_____
Manuals	\$10.00 ea	_____	_____	_____
			8.2 % WA sales tax	_____
			Order Total	_____

Method of Payment

Check Enclosed (Payable to Softwise)
 Visa Mastercard

Acct# _____ Expiration Date _____

Name on card _____
Print exactly as it appears on your card

Signature _____

Credit Card/Billing Information

Attn: _____

Phone (____) _____

Address _____

City _____ State/zip _____

Shipping Information

Company Name _____

Attn: _____

Phone (____) _____

Address _____

City _____ State/Zip _____

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