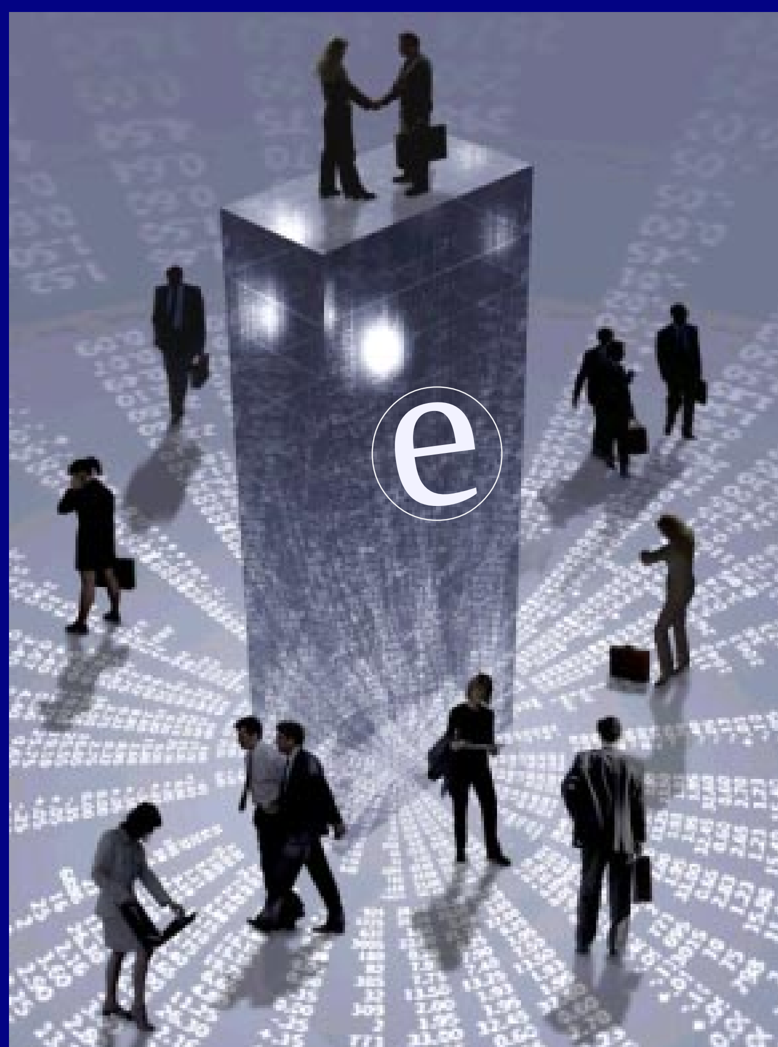
defectX.com

the internet
defect tracking system



defectX is more than just a way of tracking internet software bugs.

defectX™

the internet defect tracking system

defectX, a highly customizable bug tracking solution, enables product development teams to communicate effectively and work in real time. defectX uses a data-centric model that makes it possible for managers, developers, testers, and clients to interact and automate workflow tasks associated with the assignment, resolution, and reporting of software defects.

defectX is web enabled - so users can simply launch their web browser and instantly work from any place at any time! there is no need to worry about special software installations, upgrades, or costly maintenance fees.

please contact us at sales@defectx.com or call 703.435.0028 (U.S.A.) for more information and product private labelling or custom version.

document management

- control user access to documents
- share functional documents
- share test case documents
- automated email alerts and reminders

administration

- manage multiple products and users
- customize fields for projects, users, and defects
- configure and assign user roles
- complete online help

defect report

- standard & add-hoc reports
- user defined search criteria
- export reports to .csv

defect repository

- track software defects
- assign defects to developers
- view defect status reports

security

- data access based on roles & assignments
- automated database backups

our strategic partners

defectX – Internet Based Defect Tracking Solution

Introduction

DefectX was developed specifically for IT companies that are involved in executing software development projects, with the goal of providing them with a generic web- based tool that will allow them to manage defects and to ease communication between the individuals involved in a project. In particular, defectX attempts to:

- Provide a centralized repository for defects, which can be accessed globally with system defined user access levels
- Streamline Project Management
- Provide a mechanism where teams can share Test and Functional documents across geographic boundaries

DELIVERABLE VOLUME I
version 1.0

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Installation

defectX, being an online Application Service Provider (ASP) tool, allows the client to create an online (corporate) account (http://www.defectX.com). In order to use the defectX system the user only needs an Internet connection and a web browser; there is no need for special software installations!

After establishing the corporate account through a simple registration process, the user receives an email containing user activation information that can be used to gain access into the system. This user account is nominated as the "defectX Administrator" for the corporate account, and is used to administer the system – for example for Adding new Projects, Adding new Users, or Adding new system parameters (detailed functionality is explained in the Administrator section).

During the activation of the corporate account, a default "Master" data copy is made for the new account. defectX treats each (corporate) account in isolation – with the data for each account being isolated from other accounts.

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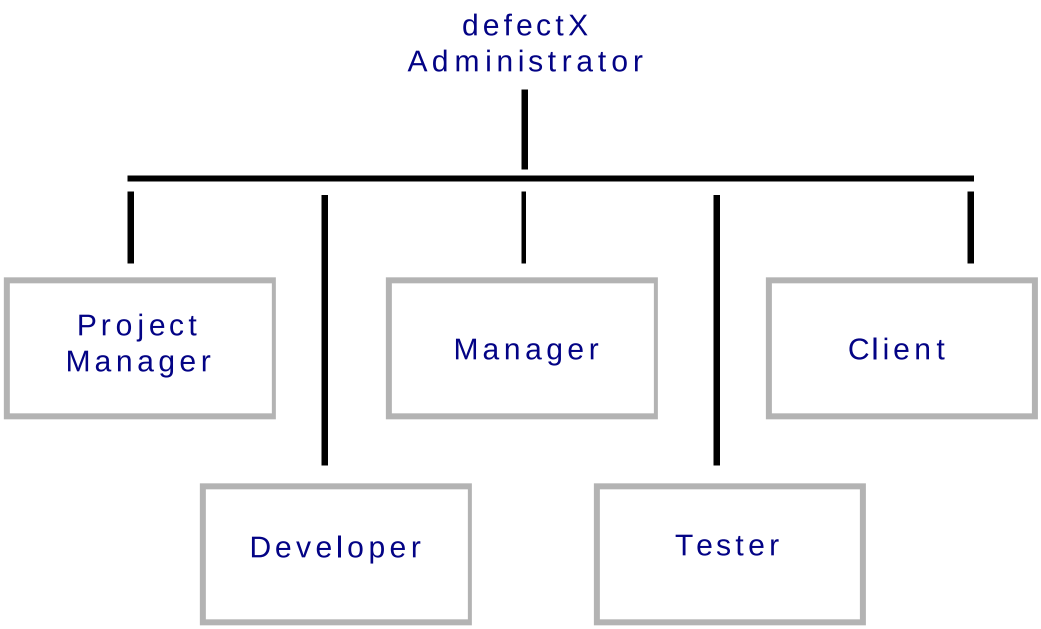
Functionality

The URL www.defectX.com takes the User to the index page of defectX. Registered users need to provide a Company Code, Login Name and Password to gain access into the system. Depending on the user's profile/role, the user will be taken to a particular Home Page. Because defectX is a 'user profile' based system, most of the functionalities are made available to the user depending on the profile set.

The hierarchy of the users (roles) is shown in the following diagram:



The defectX Administrator can create users and choose their profile/role. In addition to indicating what role a specific user will play, the Administrator also determines (grants or denies) the user's level of access to various additional resources like functional documents or TestCase documents (the details of the core functionality and additional functionality available for each user type are explained below).

The following sections contain detailed description of the unique functionality available to each user type; functionality that is common among all user types is described in the last section.

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defectX Administrator

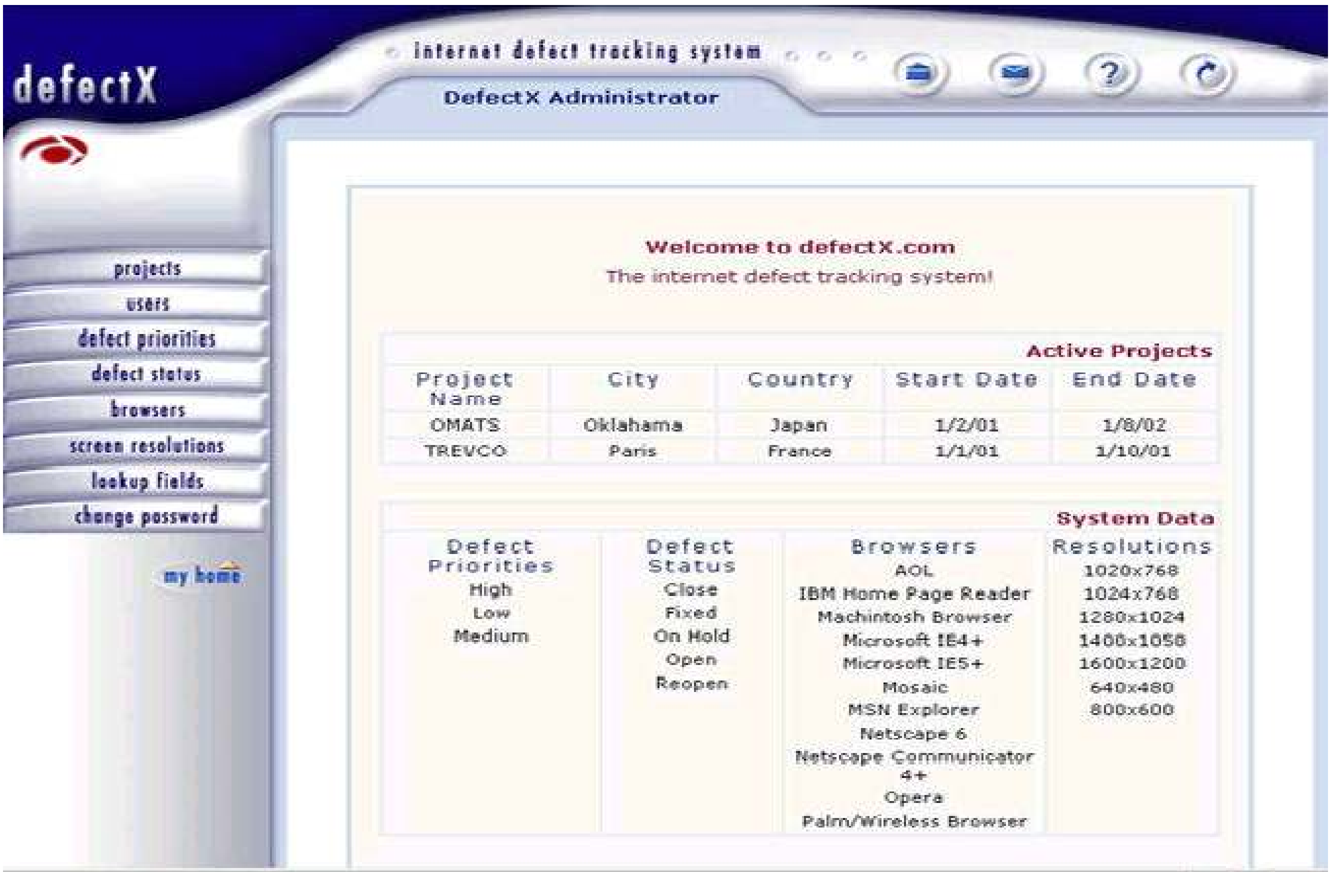
'defectX Administrator' is the Super User for the corporate account. The administrator is treated as the main entity and has access to all the tools and facilities to operate and maintain the system. A description of the Administrator's unique capabilities now follows.

My Home

The Administrator's home page provides a comprehensive view of the system's state in a single page. This page shows the listing of all the active Projects and the defined system parameters - such as Defect Status, Defect Priorities, Browsers, and Screen Resolutions. The listing of Lookup fields (these are customizable data fields for user, project and defect data) is also displayed if they have been created in the system.

The user (administrator) can come back to this page at any point of time by clicking on 'My Home' link on the left panel.

My Home (DefectX Administrator)



Projects

The Projects module allows the Administrator to View, Add, Edit, and Delete a Project.

- <u>View Project:</u>
  This page displays detailed information of all the Projects created in the system. The same page provides options to Add, Modify or Delete a Project.

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- <u>Add Project:</u>
  This option is used to add a new Project into the system. The mandatory parameters for adding a Project will be clearly marked on the page. Information about the Project's Name, Start Date, End Date and Client Address details is captured at this point. The Project's status is also required on this screen (the default Project Status for a new project is active). If the Administrator at any point sets the Status of the Project to inactive the Project will not be accessible to other Users.

  During the creation of a Project's instance, a project module is automatically created in the system with the name 'General'; this module can be used for entering general defects pertaining to the Project.

- <u>Modify Project:</u>
  This option lets the Administrator change the details related to a particular Project. All the information related to the Project, like Project Information or Client Details can be modified.

- <u>Delete Project:</u>
  This option lets the administrator remove a Project instance from the system. It is mandatory to delete all Project modules and assignments prior to removing the Project.

Users

The Users module allows the administrator to View, Add, Modify and Delete Users (accounts).

- <u>Add Users:</u>
  This option lets the Administrator create a new User account. When creating a new user the Administrator is required to specify the role (account type) for the new user. The intention of creating different user roles/types is to give different levels of authentication and access to individuals by which they can perform their tasks. The five types of user roles/types are:

  1. *Project Manager:* The Project Manager profile gets created for one or more Projects. This User will be responsible for the complete administration of the Project, such as creating project modules, assigning project modules to developers and testers, and maintaining project documents.

  2. *Manager:* By default, a Manager gets access to all active Projects in the system. The Manager profile ideally gets created for the top authorities that are interested in knowing the day-to-day progress of all the Projects that are running in defectX.

  3. *Client:* The Client profile is treated as an external entity. This profile is created exclusively for giving outsiders (e.g. clients) a summary view of the project's data. This profile has unique modules like Feedback (which allows the user to send and receive messages to/from the Project Manger) and 'Defect Report' which displays a summary of the project's status to the user.

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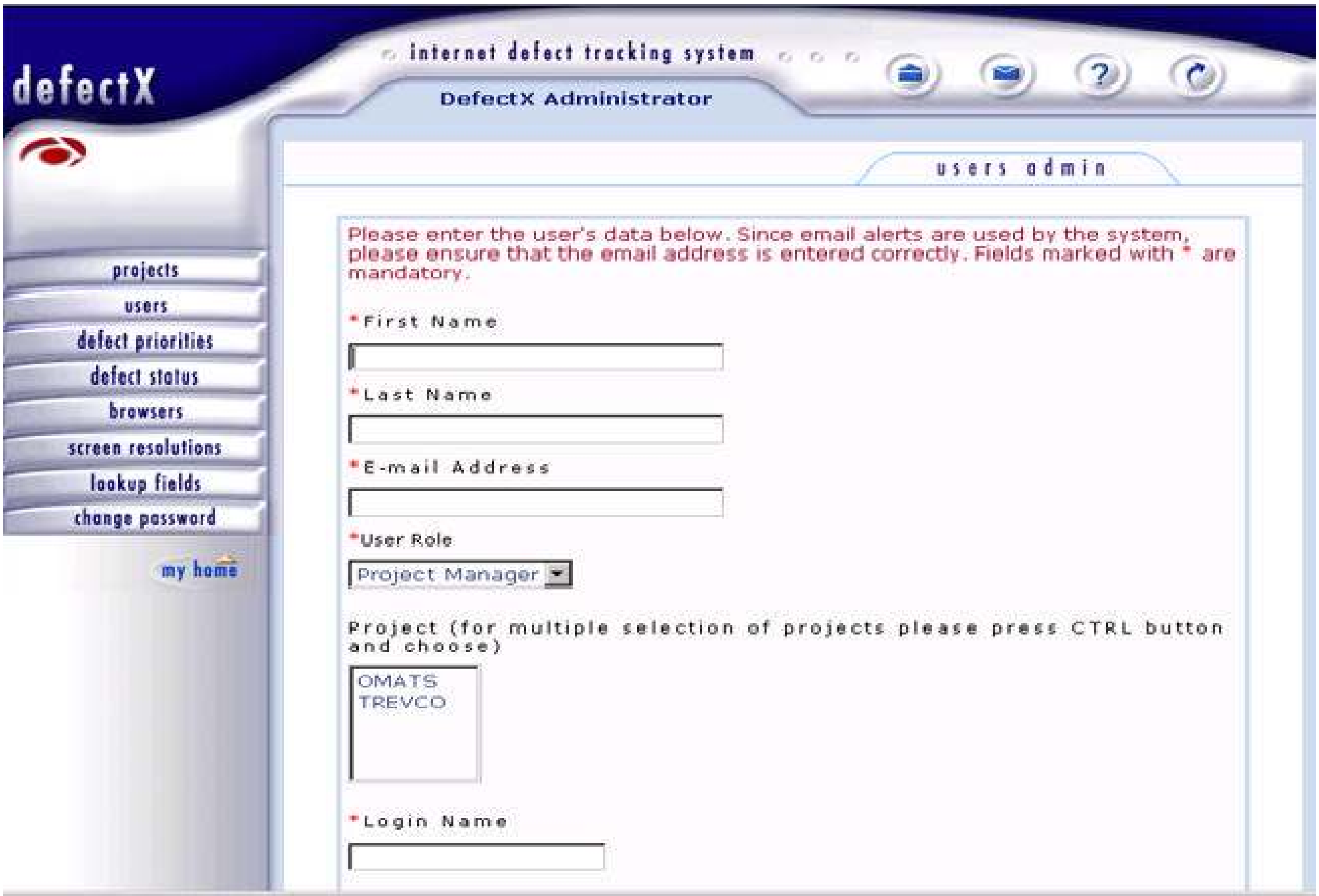
4. *Developer:* The Developer profile is created for the software developers involved in the project. Developers can view defects created against their assigned modules, and respond to them accordingly.

5. *Tester:* The Tester profile is created for the testers of the development project. Testers are allowed to add defects and to view the status of defects in their assigned modules. Testers are also given access to the Test Case and Functional documents.

When creating a Project Manager or Client account, the administrator is required to assign an exiting project the new user; in the case of developers, tester, manager users the assignment option is not available to the Administrator (the project's assignments will be done by the Project Manager).

When creating a new user the Administrator can also grant or deny access to Project documents (Functional and Test-Case documents).

Add User



- View Users:
  This option lists (in alphabetical order) all the users created in the system.

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- Modify Users:
  This option allows the Administrator to make changes to the user's information, including personal details, the user's role, and the assignments.

- Delete Users:
  This option lets the Administrator remove users from the system. The user's assignments are automatically removed from the system.

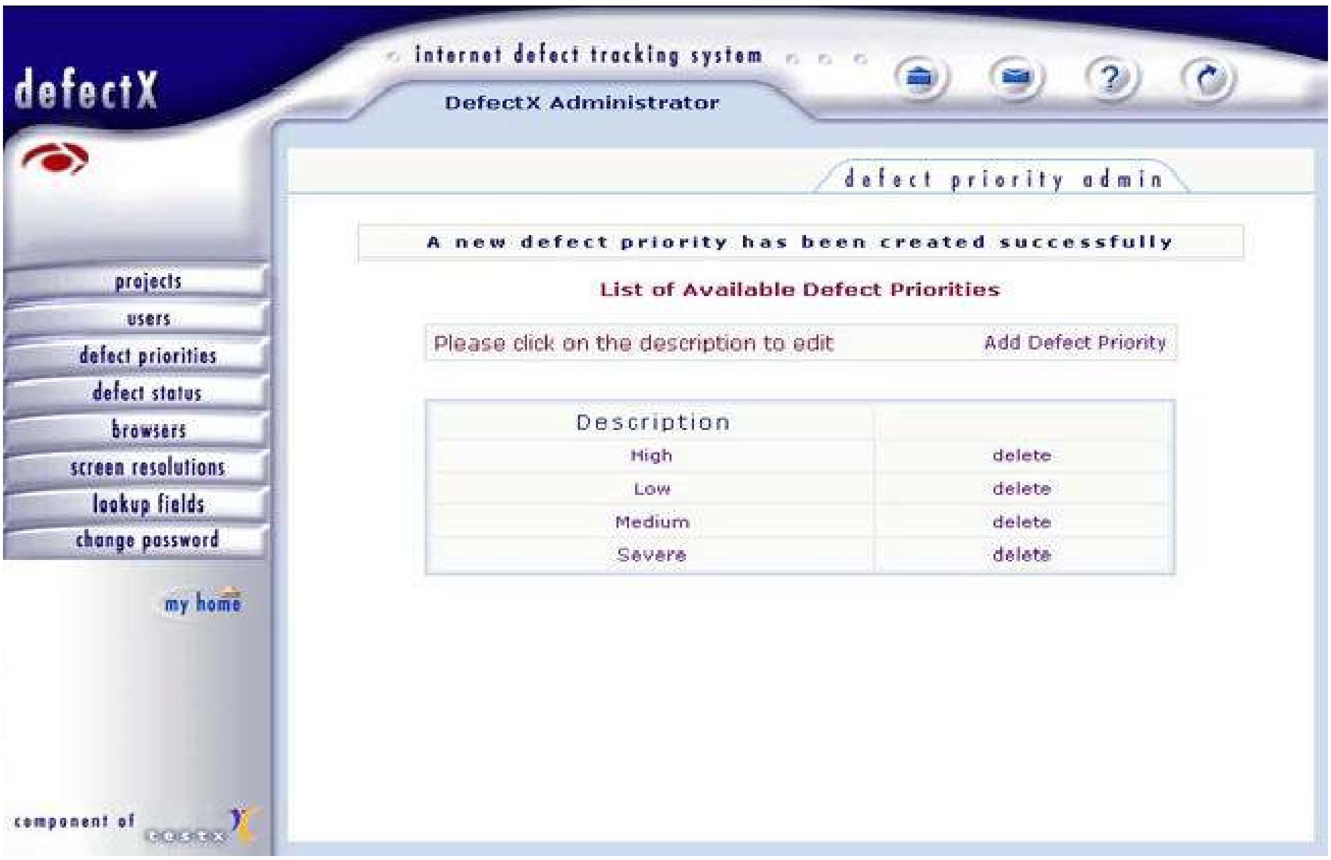
Defect Priorities

The 'Defect Priorities' module lets the Administrator define the possible priorities that can be assigned to a defect. Typical values for defect priorities include Critical, High, Medium, and Low. The priorities list is available for all projects across the system, and is available as a search criteria parameter in the query and reporting screens.

'Defect Priorities' has four different options for Viewing, Adding, Modifying and Deleting a priority:

- View Defect Priority:
  This option displays all the defect priorities present in the system. This page also gives the Administrator the option to Add, Modify and Delete a defect priority.

View Defect Priority



- Add Defect Priority
  This option allows the Administrator to add a new defect priority.

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- <u>Modify Defect Priority:</u>
  This option allows the Administrator to modify existing defect priorities.

- <u>Delete Defect Priority:</u>
  This option allows the Administrator to delete defect priorities. *Note:* If defects with the given priority exist in the system, the defect priority cannot be deleted.

Defect Status

The 'Defect Status' module lets the Administrator define the possible status that can be assigned to a defect. Typical values for defect status include Open, Closed, Re-Test, and On-Hold. The status list is available for all projects across the system, and is available as a search criteria parameter in the query and reporting screens.

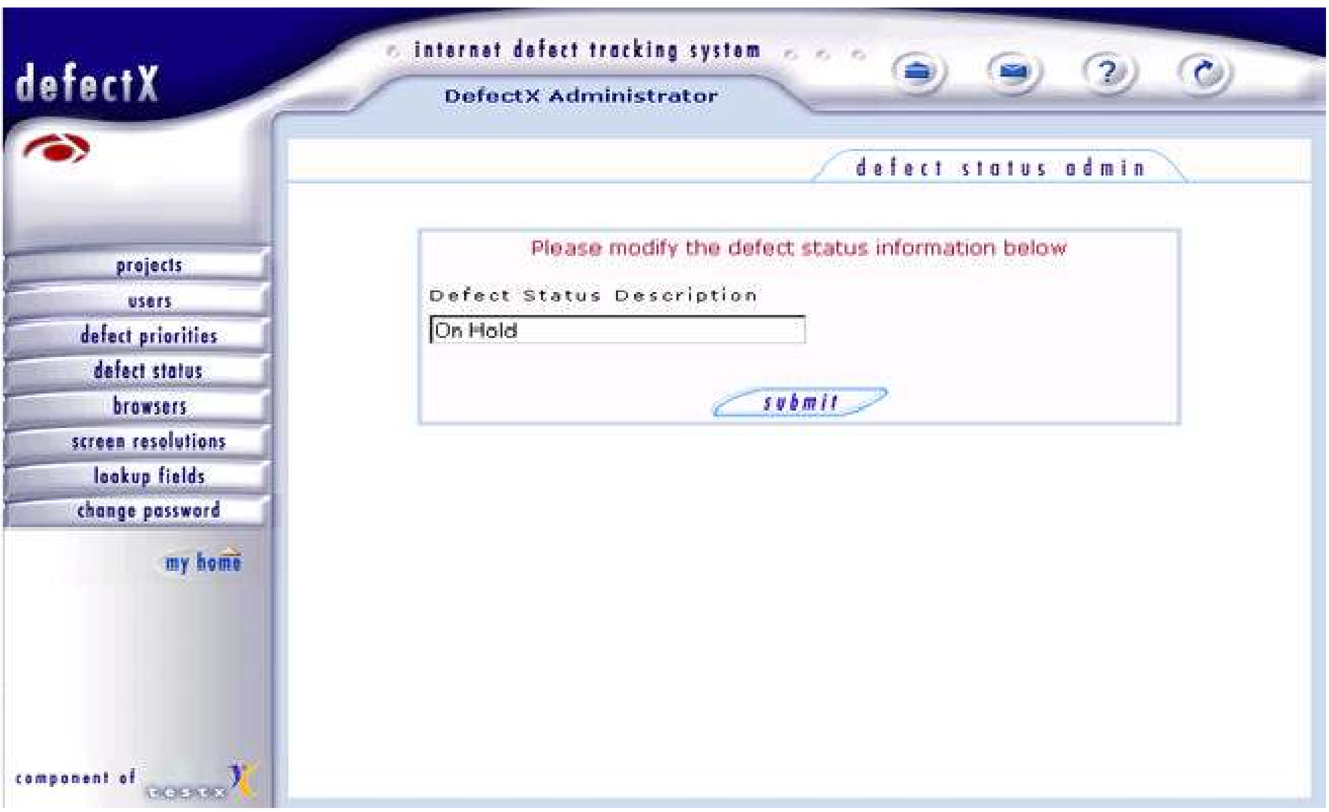
'Defect Status' has four different options for Viewing, Adding, Modifying and Deleting a status:

- <u>View Defect Status</u>
  This option displays all the defect status present in the system. This page also gives the Administrator the option to Add, Modify and Delete a defect status.

- <u>Add Defect Status</u>
  This option allows the Administrator to add a new defect status.

- <u>Modify Defect Status</u>
  This option allows the Administrator to modify existing defect status.

Modify Defect Status



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- <u>Delete Defect Status</u>
  This option will allow the Administrator to delete defect status. *Note:* If defects with the given status exist in the system, the defect status cannot be deleted.

Browsers

The ‘Browsers’ module lets the Administrator define the possible browsers that can be used for testing and be associated with a defect. Typical values for browsers include Netscape, Internet Explorer, Mosaic, and AOL. The browser list is available for all projects across the system, and is available as a search criteria parameter in the query and reporting screens.

‘Browsers’ has four different options for Viewing, Adding, Modifying and Deleting a browser:

- <u>View Browser</u>
  This option displays all the browser definitions present in the system. This page also gives the Administrator the option to Add, Modify and Delete Browsers.

- <u>Add Browser</u>
  This option allows the Administrator to add a new Browser definition.

- <u>Modify Browser</u>
  This option allows the Administrator to modify existing Browser definitions.

- <u>Delete Browser</u>
  This option allows the Administrator to delete a Browser definition. *Note:* If defects associated with the given browser exist in the system, the browser cannot be deleted.

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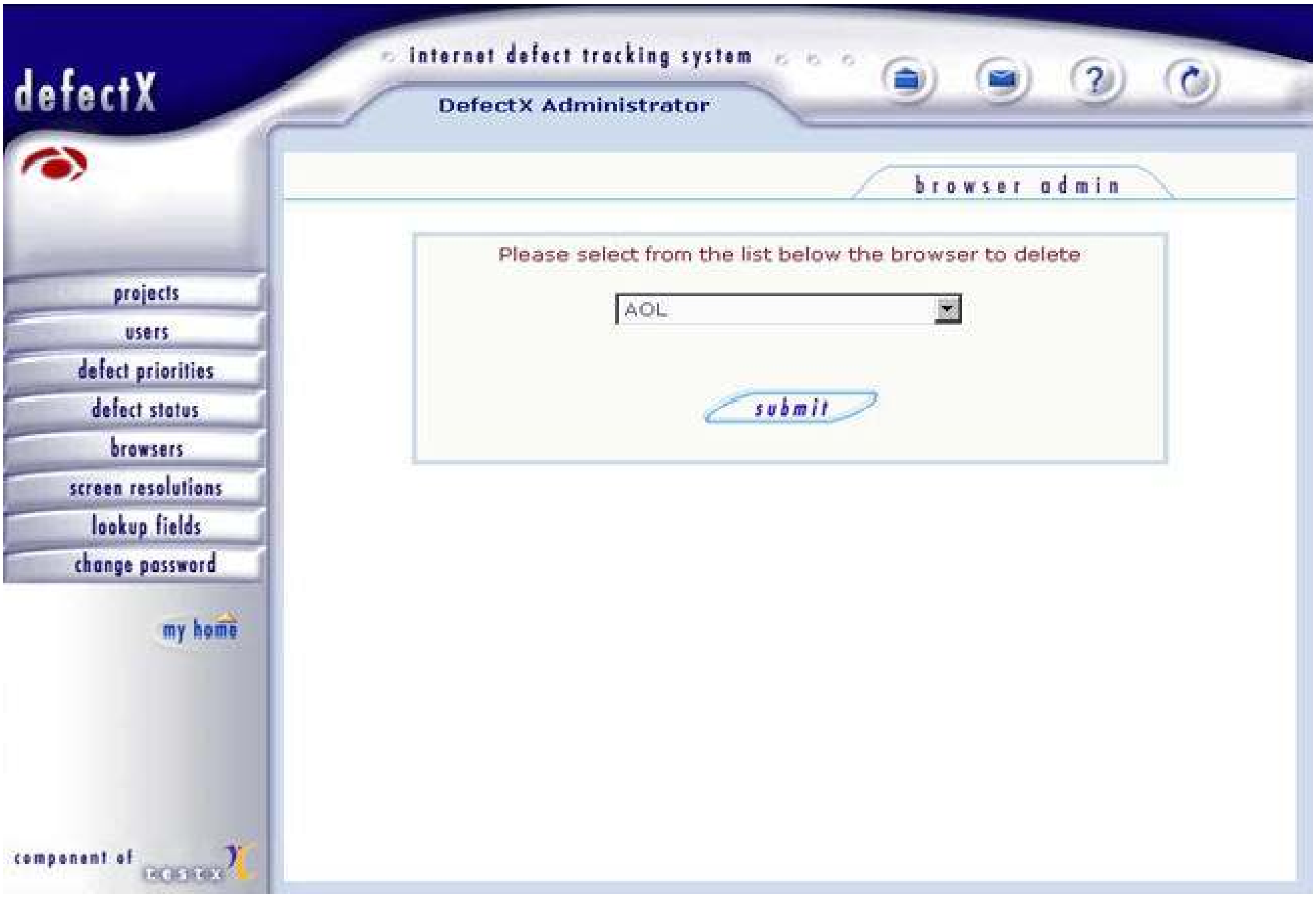
Delete Browser



Screen Resolutions

The ‘Screen Resolutions’ module lets the Administrator define the possible screen resolutions that can be used for testing and be associated with a defect. Typical values for screen resolutions include 640x480, 800x600, 1024x768 and 1600x1200. The screen resolutions list is available for all projects across the system, and is available as a search criteria parameter in the query and reporting screens.

‘Screen Resolutions’ has four different options for Viewing, Adding, Modifying and Deleting a screen resolution:

- View Screen Resolution
  This option displays all the screen resolution definitions present in the system. This page also gives the Administrator the option to Add, Modify and Delete screen resolutions.

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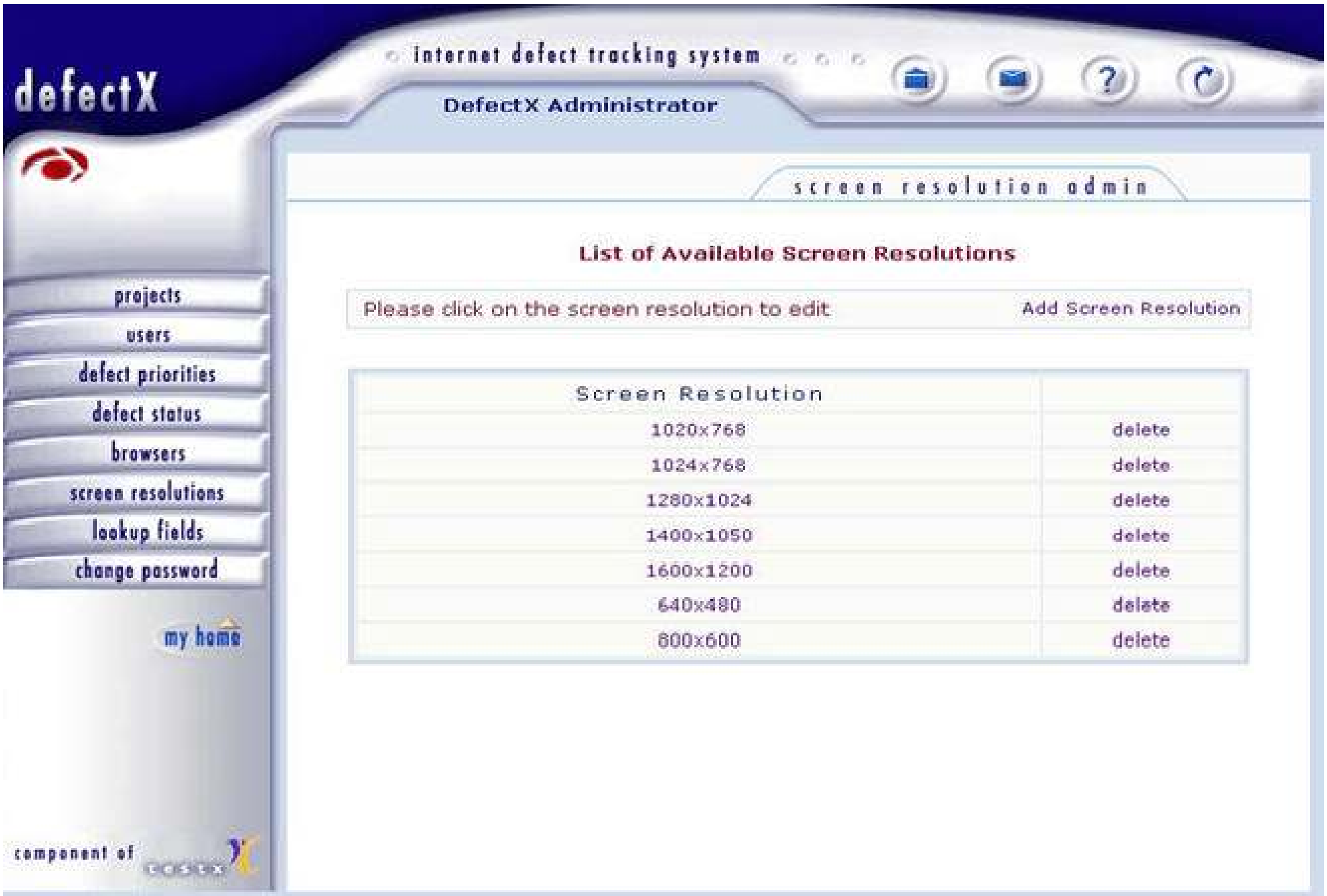
View Screen Resolution



- Add Screen Resolution
  This option allows the Administrator to add a new screen resolution definition.

- Modify Screen Resolution
  This option allows the Administrator to modify existing Screen Resolutions.

- Delete Screen Resolution
  This option allows the Administrator to delete a screen resolution definition. *Note:* If defects associated with the given screen resolution exist in the system, the screen resolution cannot be deleted.

Lookup Fields

The 'Lookup Fields' module let the Administrator manage (setup) customizable fields for collecting specific project, user, or defect data. These lookup fields are typically used to collect specific data that is not already defined/collected by the defectX system. For example, a company Administrator wanting to collect/store a user's employee-id number may set "SSN" as a User lookup field. The Administrator is allowed to setup up to five customizable fields for each module (project, user, data).

Once a lookup field is defined it will be displayed in the corresponding (project, user, or defect) input and review screens; in the example above the field SSN would be displayed in the screens used to view, edit, or add users.

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The 'Lookup Fields' module has four different options for Viewing, Adding, Modify, and Deleting a lookup field:

- View Lookup Fields
  This option displays all the lookup fields created for all three modules (projects, users and defects). The page also gives the Administrator the option to Add Lookup Field, Modify Lookup Field and Delete Lookup Field.

View Lookup fields

- Add Lookup Field
  This option allows the Administrator to add a new lookup field.

- Modify Lookup Field
  This option allows the Administrator to modify existing lookup fields.

- Delete Lookup Field
  This option allows the Administrator to delete lookup fields.
  Note: If data associated with the given lookup field exists in the system, the lookup field cannot be deleted.

Change Password

The 'Change Password' module allows the Administrator to change the administrator's user account password.

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Project Manager

'Project Manager' can be considered the Administrator or supervisor for a particular project - and as such conducts actions to configure and track the project's tasks. For example, the project manager can define/create project modules, assigns developers and testers to these modules, has access to summary and detailed project reports, and keeps track of the client's feedback. A detailed description of the project manager's unique capabilities now follows:

My Home

This module is specially designed to provide Project Managers with all the information pertaining to a selected Project. This page will have a listing of the Project module, list of Developers' and Testers' assignments with statistics of defects for that Project.

The Project Manager's home page provides a comprehensive view of the project's state in a single page. This page shows the listing of project modules, a list of developer and tester assignments with defect statistics for the project. The user can access this page at any point of time by clicking on 'My Home' link on the left panel.

My Home (Project Manager)

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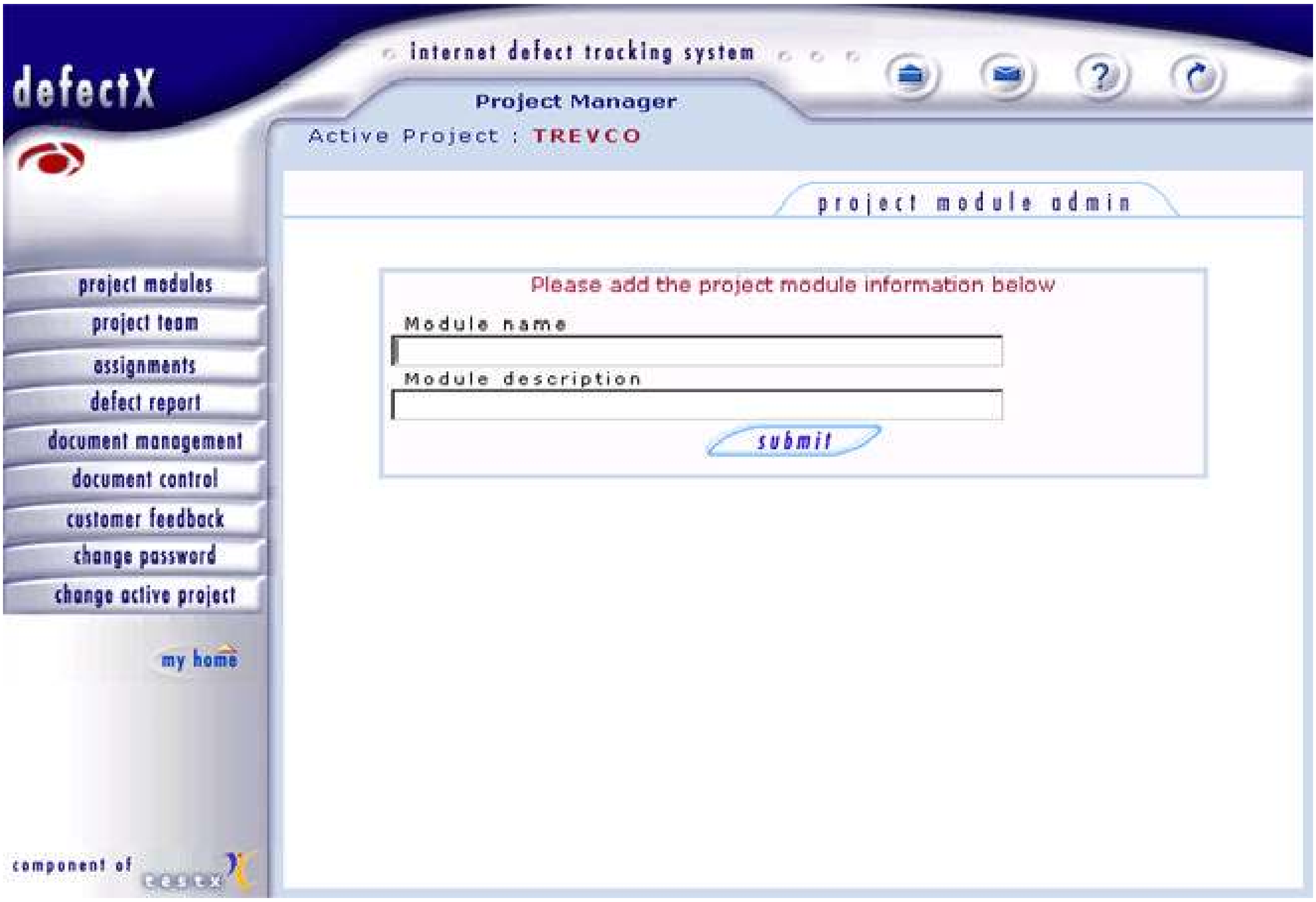
Project Modules

The 'Project Modules' module has four different options for Viewing, Adding, Modify, and Deleting a project modules:

- <u>View Project Module</u>
  This option displays detailed information of all the projects modules created for a particular project. The page also provides options to Add, Modify and Delete project modules, and to assign a developer or tester to the module.

- <u>Add Project Module</u>
  This option allows the Project Manager to add a new project module.

Add Project Module



- <u>Modify Project Module</u>
  This option allows the Project Manager to edit a project module.

- <u>Delete Project Module</u>
  This option allows the Project Manager to delete a project module.
  Note: If data associated with the given project module exists in the system, the project module cannot be deleted.

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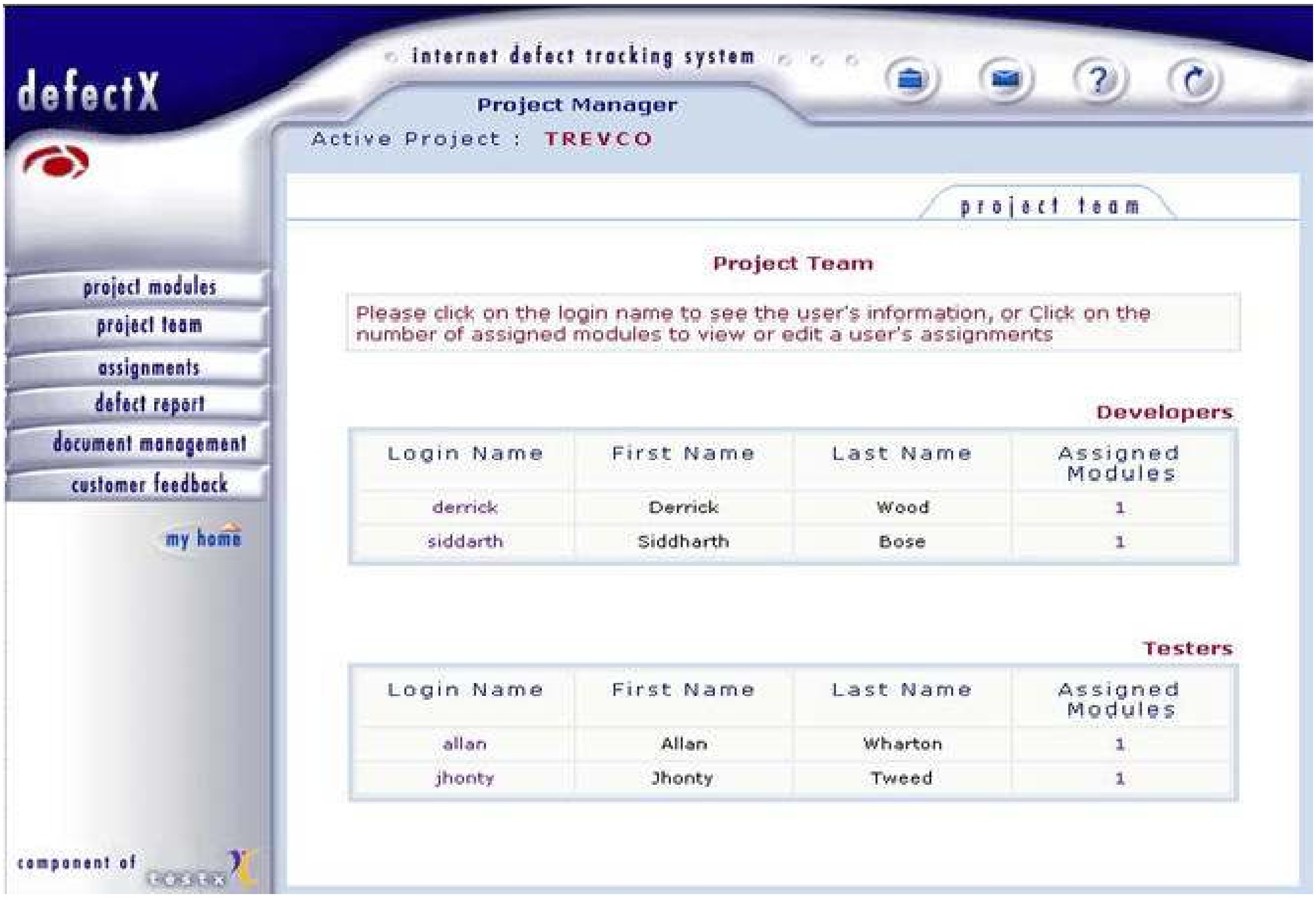
Project Team

The ‘Project Team’ module gives detailed information about the users assigned to a particular Project. The page displays the list of Developers and Testers along with the count of assigned project modules.

By clicking on a user’s login name the Project Manager can view the user’s details. The Project Manager can also view or modify the user’s assignments by clicking on the number (count) of assigned project modules.

Project Team



Assignments

The ‘Assignments’ module allows the Project Manager to View, Add, Modify, and Delete Assignments.

- View Assignment
  This option displays the list of Assignments for all the modules defined in the project. From this page, the Project Manager can also modify or delete assignments. Clicking on a user’s name displays the user’s detailed information.

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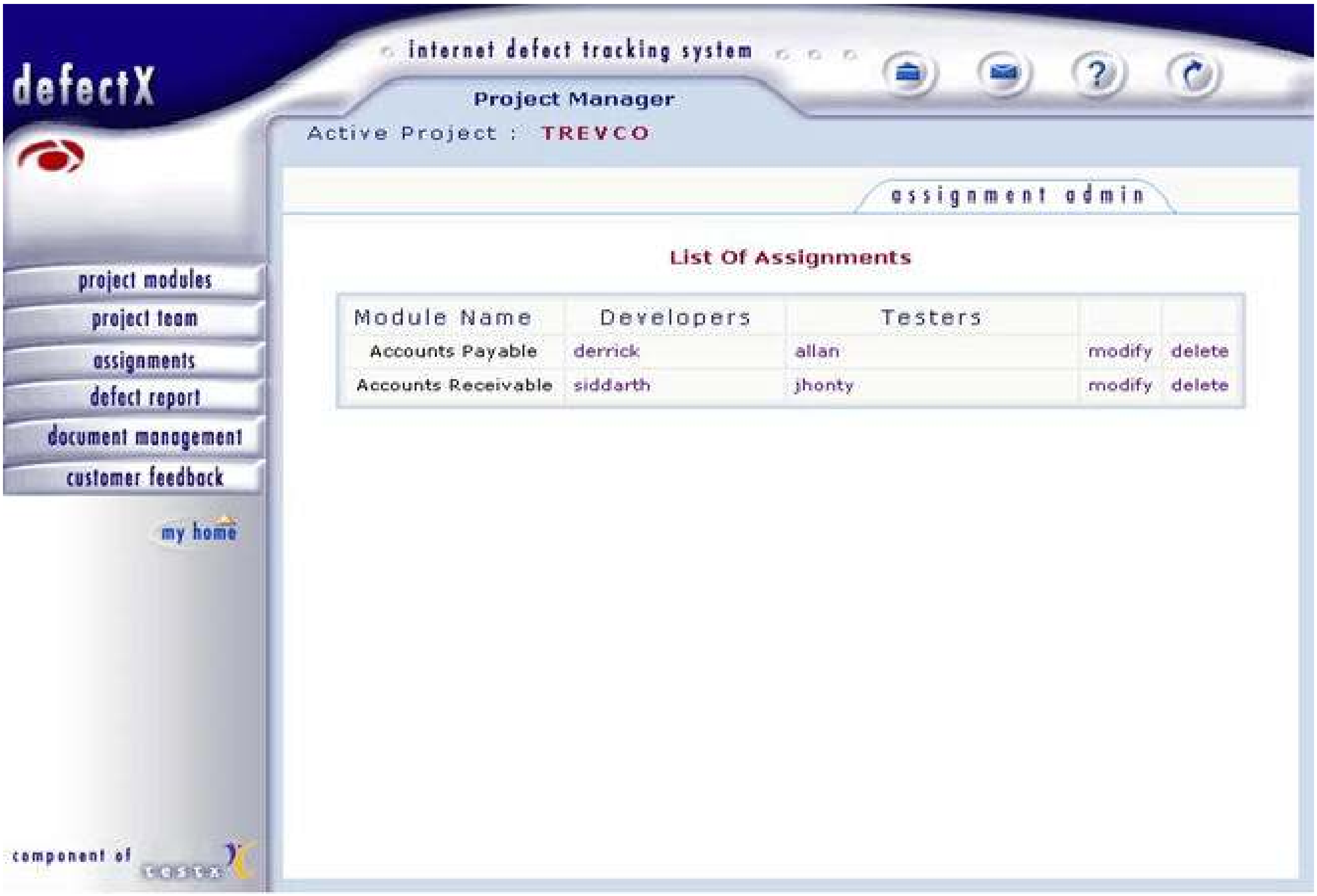
View Assignment



- <u>Add Assignment</u>
  This option lets the Project Manager assign a project module to a user (developer or tester). A project module can be assigned to multiple developers and/or testers. Note: A developer or tester will not be able to successfully login into the system if no project modules are assigned to him/her.

- <u>Modify Assignment</u>
  This option lets the Project Manager change the assignments of a particular project module.

- <u>Delete Assignment</u>
  This option lets the Project Manager delete assignments.

Document Control

Document control module helps Project Manager to set permissions for Document management section ie Functional Document and Testcase Document.(This exercise is done only for the developer and testers. The Permissions set are applicable at system level)

View

This module will display the list of developers and testers and the access permissions set for Functional Document section and Testcase document section.

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Document Access

This module will help in granting the permission for selected developer or tester.
The list of developers and testers along with their user profiles is displayed, on selection of particular user the original settings are displayed and project manager is given option to modify permission.

Customer Feedback

The 'Customer Feedback' module gives the Project Manager a mechanism for establishing and tracking communications to/from the client. The module provides a detailed listing of the client's messages and gives the Project Manager the option of responding.

The messages received from client can be accessed in two different views:

- Unread Messages
  This option lists all new (unread) messages from the client and allows the Project Manager to respond.

Unread Messages

- All Messages
  This option lists all the messages (read or unread) received from the project's clients. If the user has already responded to a message, the 'Response' column will contain a YES. To initiate a new response to the client the user can click on the 'Respond' action link.

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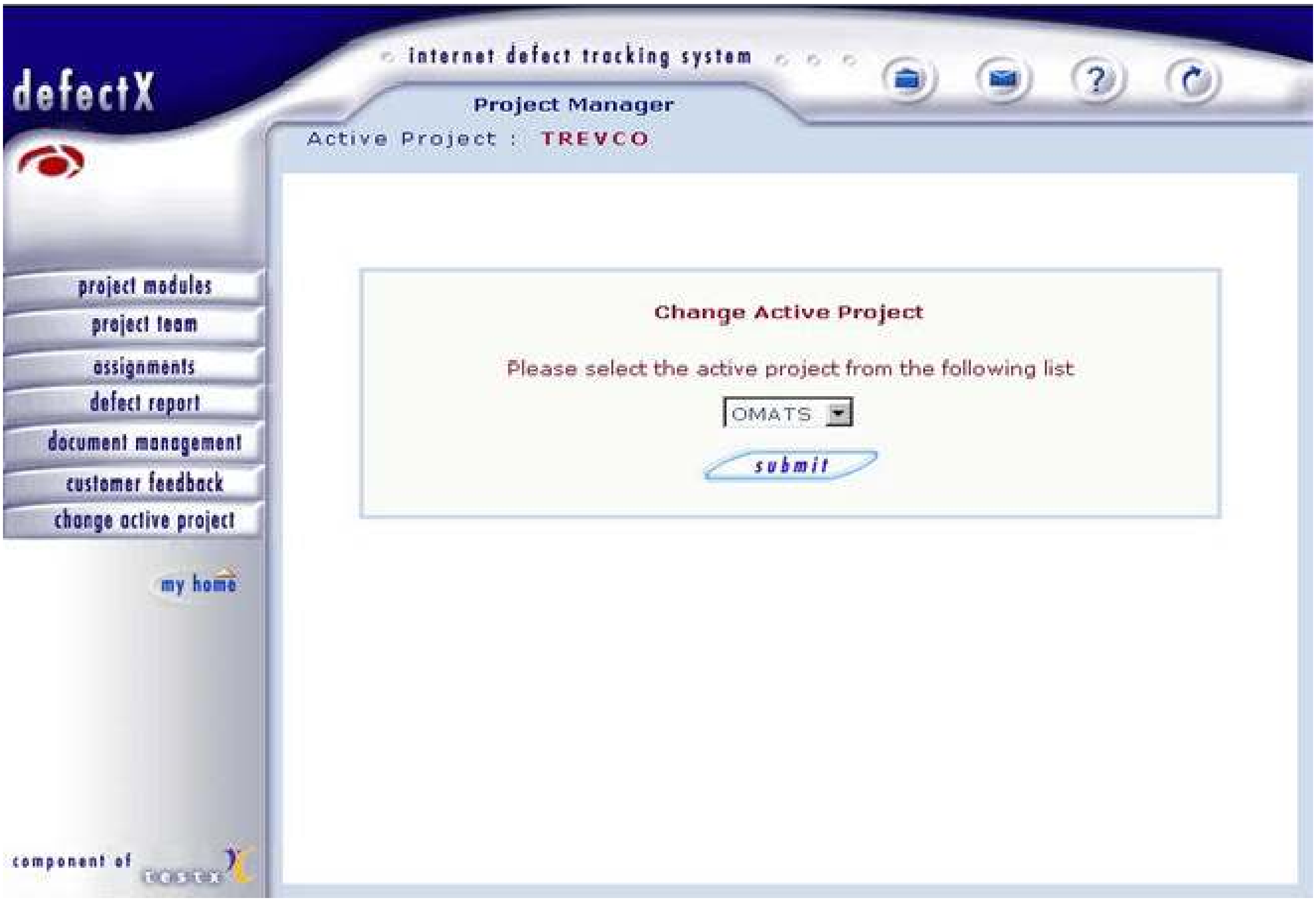
Change Password

The ‘Change Password’ module allows the user to change the user account password.

Change Active Project

Since a Project Manager can be assigned to multiple projects, he/she must be able to indicate/establish which project is selected as the ‘active’ project (this determining which project is used for viewing and manipulating its data). Immediately after logging-in the Project Manager is required to select an active project, but can change it at any time using the ‘Change Active Project’ functionality.

Change Active Project:



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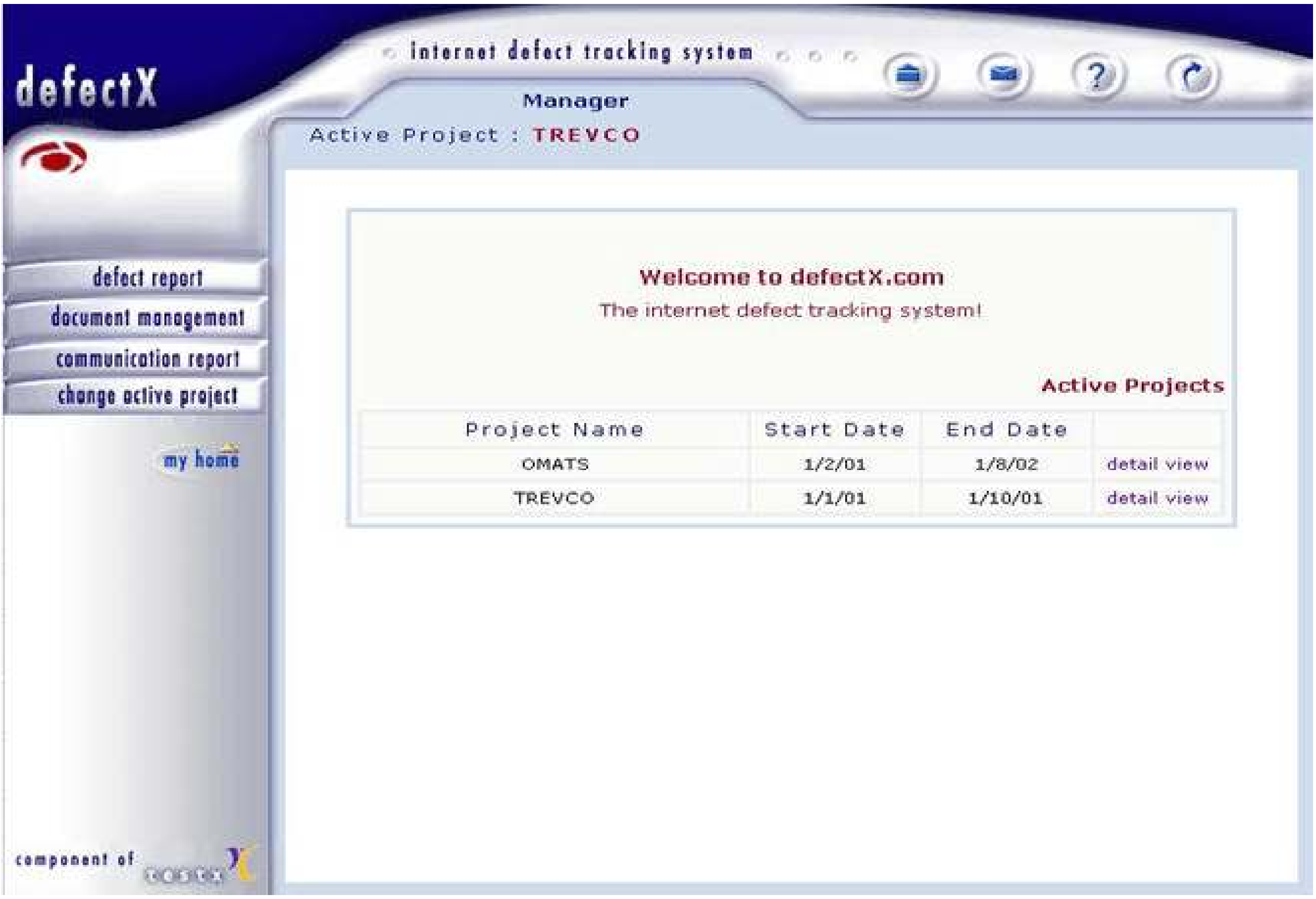
Manager

'Manager' is a generic profile that allows the user to view data across the corporate account (across all projects). By default, all active projects are assigned to the Manager's profile. A detailed description of the manager's unique capabilities now follows:

My Home

This module is specially designed to give Managers first-hand information regarding the active projects in the system. The 'My Home' page lists all the active projects and gives the Manager the ability to view a project's details (such as team members, assignments, defects and status) by clicking the 'Detailed View' link. The user can access this page at any point by clicking on the 'My Home' link on the left panel.

My Home (Manager)



Communication Report

This module allows the Manager to query and view communications between the Project Manager and the Client for a selected project during a given time period.

The communication report displays the client name, date and message text, and the project manager's response date and text. A status flag is also associated with the client's message indicating if the Project Manager has already replied to it; a status of 'closed' means that the Project Manager has replied to the message, while a status of 'open' means that no reply has been sent to the client.

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Communication Report

Change Password

The ‘Change Password’ module allows the user to change the user account password.

Change Active Project

In order to filter the project data to be accessible to a Manager an “active” project can be selected by using the “Change Active Project” functionality. The Manager must have selected an active project when accessing the defect reports and the document management section.

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Client

The 'Client' profile is created exclusively for giving outsiders (e.g. clients) a summary view of the project's data. This profile has unique modules like Feedback (which allows the user to send and receive messages to/from the Project Manger) and 'Defect Report' which displays a summary of the project's status to the user. A detailed description of the client's unique capabilities now follows:

My Home

This module provides the Clients with a summary of the projects running under the system. The users can access this page at any point by clicking on the 'My Home' link on the left panel.

My Home (Client)

Feedback

The 'Feedback' module gives the client the ability to communicate (send feedback, complaints or suggestions) directly to a Project Manager. Feedback submitted by the client is routed directly to the Project Manager's feedback queue – where he/she can then take immediate action and possible initiate a reply to the client; the reply (from the Project Manager) is sent via email to the client (not to a defectX inbox or queue) so that the client does not have to keep checking (coming back to) the system.

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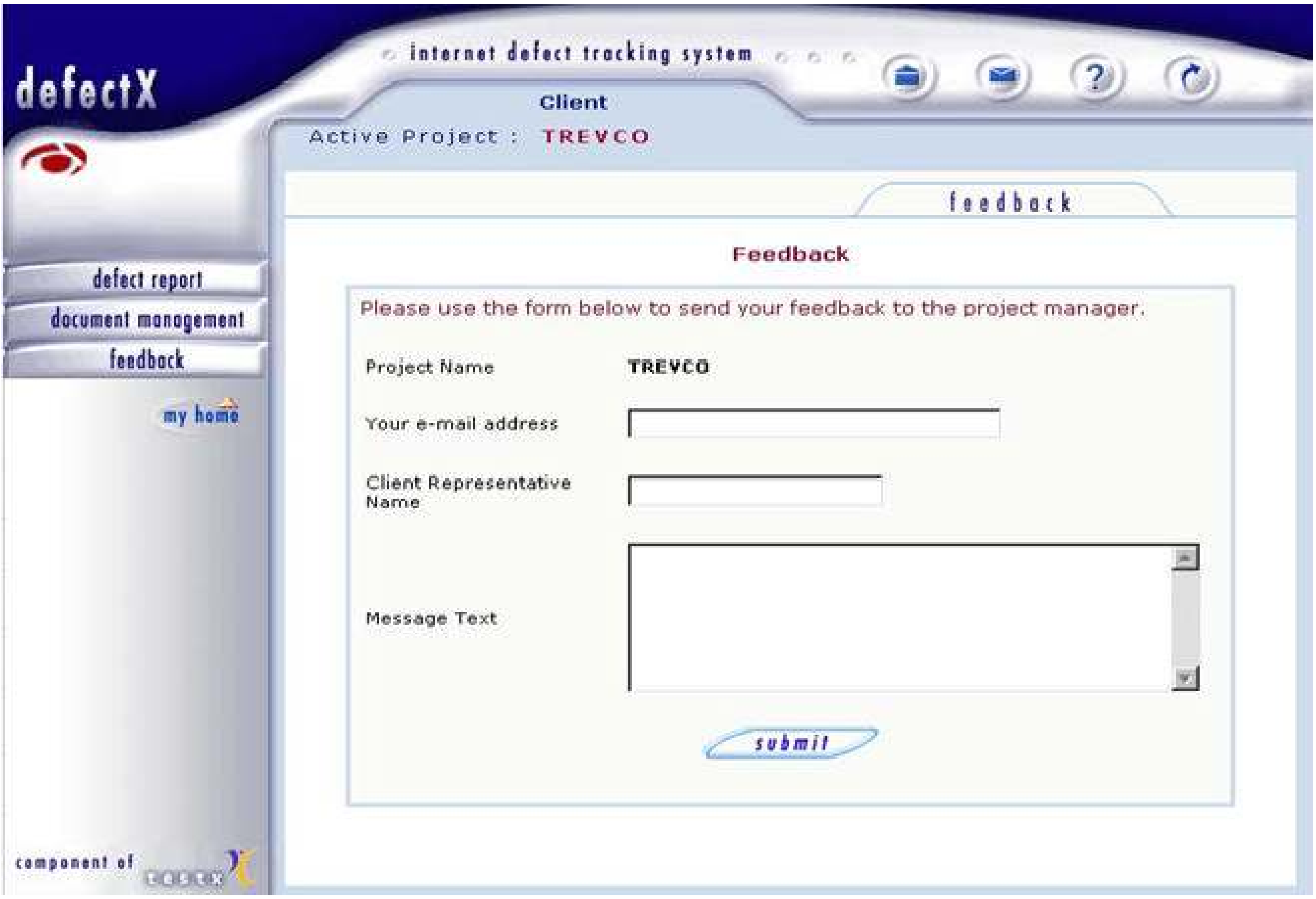
Feedback



Change Active Project

In order to filter the project data to be accessible to a client an "active" project can be selected by using the "Change Active Project" functionality. The client must have selected an active project when accessing the defect reports and the document management section.

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Developer

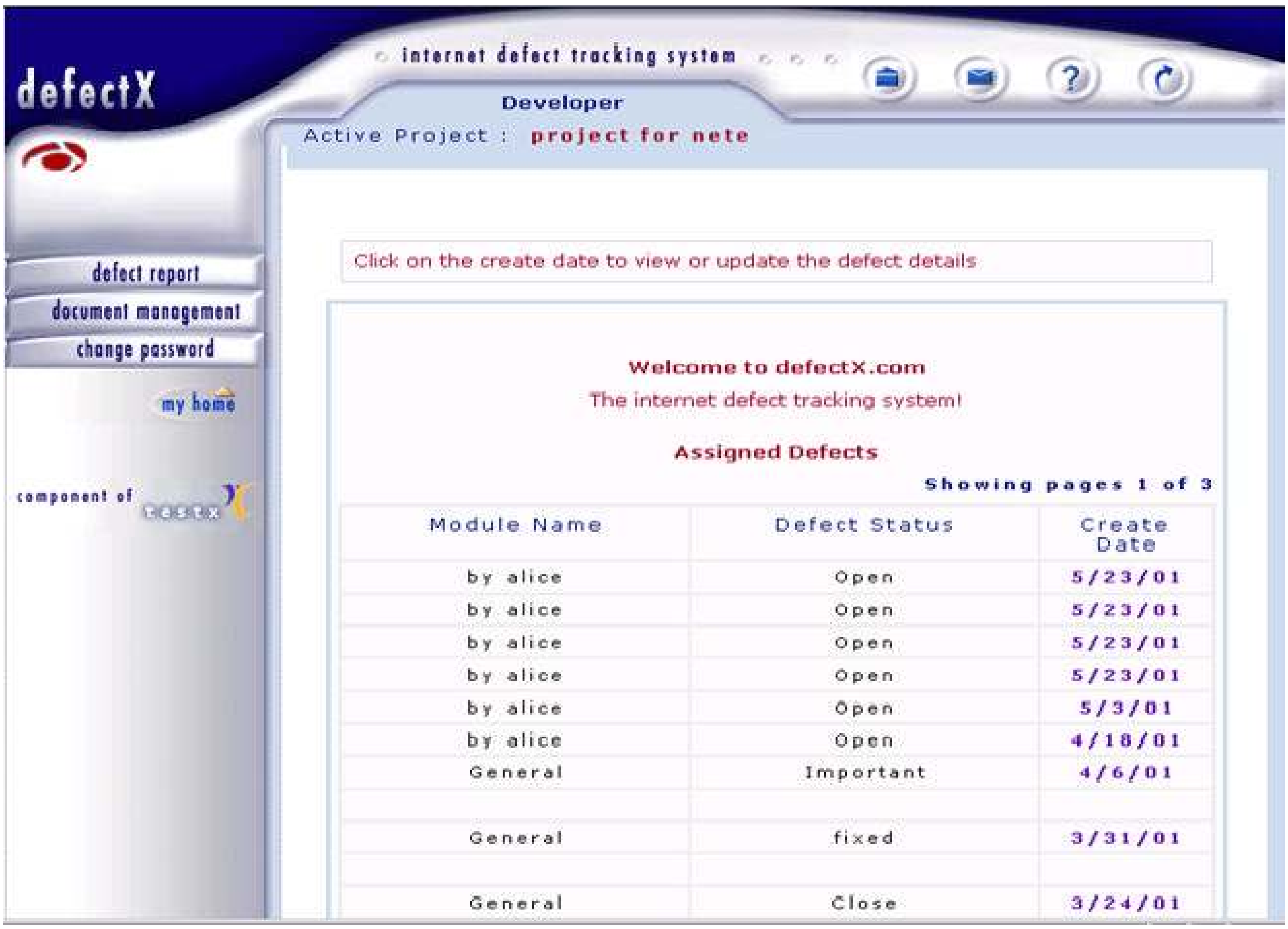
The Developer profile is created for the software developers involved in the project. Developers can view defects created against their assigned modules, and respond to them accordingly.

When the Administrator creates a user with a 'Developer' user profile/type a project assignment cannot be done. Instead, the Project Manager makes the assignment by assigning the developer to one of the project's modules. The developer will not be able to login into the system until this assignment has taken place. The Developer can be assigned to multiple Projects at the same time. A detailed description of the developer's unique capabilities now follows:

My Home

This module is specially designed to give the Developer first-hand information on the assignments and status of defects assigned to him/her. The developer can view the list of defects with the most recent defects displayed on top. The developer can access this page at any point by clicking on the 'My Home' link on the left panel.

My Home (Developer)



Change Password

The 'Change Password' module allows the user to change the user account password.

Change Active Project

In order to filter the project data to be accessible to the developer an "active" project can be selected by using the "Change Active Project" functionality. The developer must have selected an active project when accessing the defect reports and the document management section.

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Tester

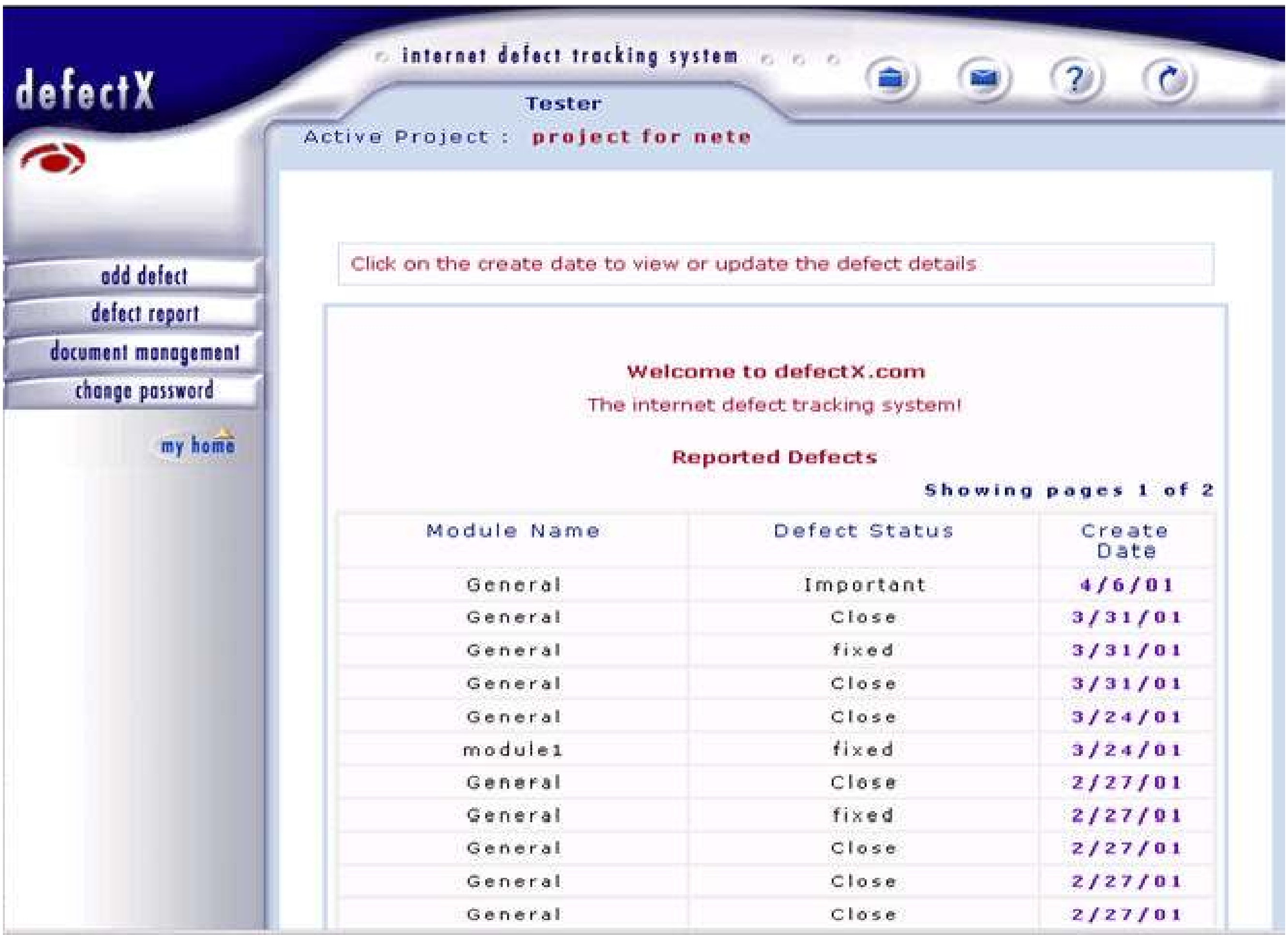
The Tester profile is created for the testers of the development project. Testers are allowed to add defects and to view the status of defects in their assigned modules. Testers are also given access to the Test Case and Functional documents.

When the Administrator creates a user with a 'Tester' user profile/type a project assignment cannot be done. Instead, the Project Manager makes the assignment by assigning the tester to one of the project's modules. The tester will not be able to login into the system until this assignment has taken place. The tester can be assigned to multiple Projects at the same time. A detailed description of the tester's unique capabilities now follows:

My Home

This module is specially designed to give the Tester first-hand information on the assignments and status of defects created by him/her. The tester can view the list of defects with the most recent defects displayed on top. The tester can access this page at any point by clicking on the 'My Home' link on the left panel.

My Home (Tester)



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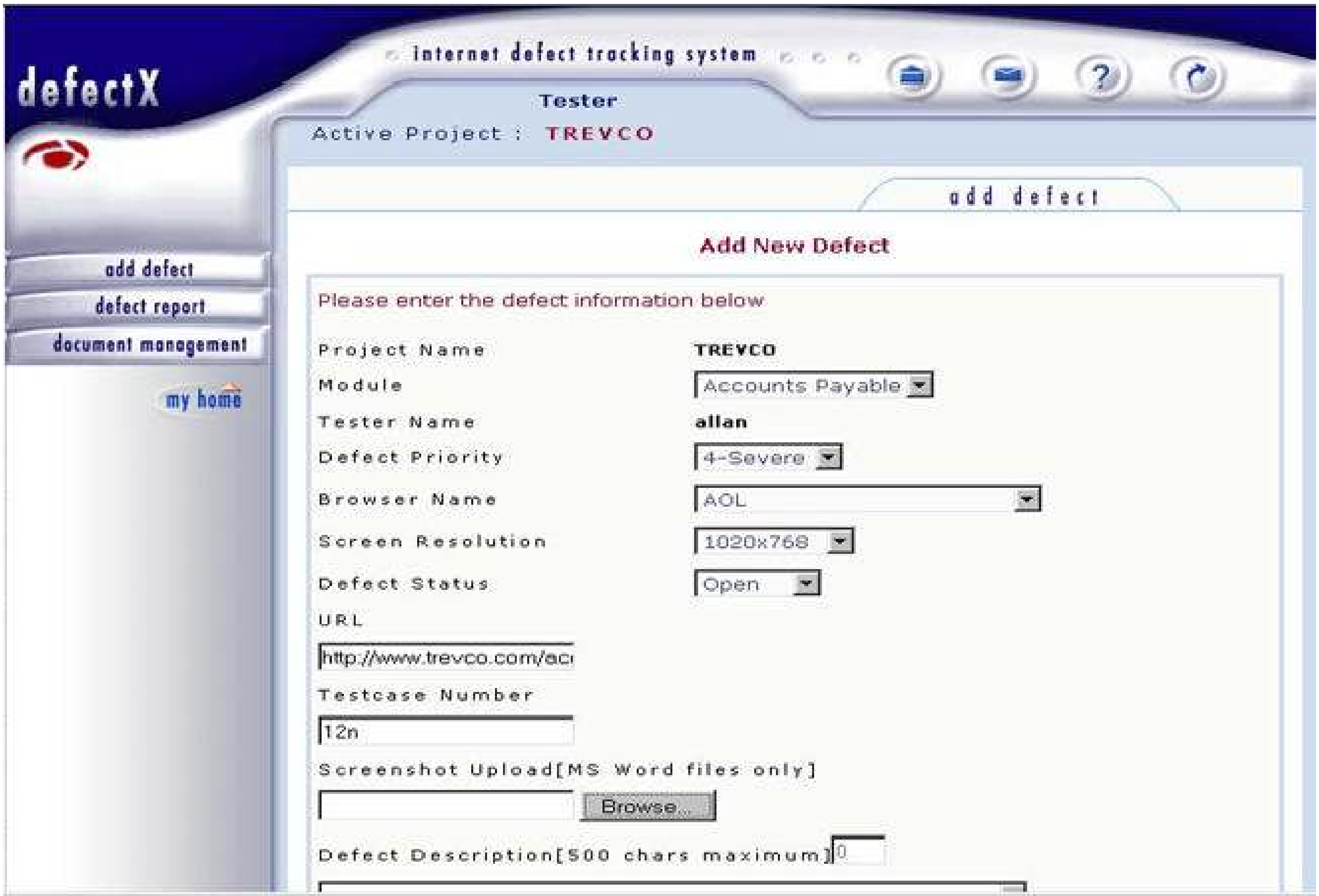
Add Defect

The ‘Add defect’ module is heart of defectX; it allows the tester to add/submit a defect against a particular project module. When submitting a new defect the tester specifies defect properties such as the defect’s priority and status (defaults to open); the tester also specifies some of the testing conditions that generated the defect, such as the Browser (type) used, the screen resolution, the URL of the page being tested, and the Test-Case number (optional). Additionally, the tester can upload a document as a reference to the defect being entered.

Add Defect



On successful creation of a new defect a Defect Number is generated by the system and displayed to the user. The purpose of the Defect Number is to allow the tester to easily locate (query for) the defect in the system, as well as to ease communication with the developer(s) and manager(s).

Change Password

The ‘Change Password’ module allows the user to change the user account password.

Change Active Project

In order to filter the project data to be accessible to the tester an “active” project can be selected by using the “Change Active Project” functionality. The tester must have selected an active project when accessing the defect reports and the document management section.

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Generic Modules

Following is the description of the generic modules that are common across the entire system and can be accessed by all users. However, the access level will depend on the user profile.

Defect Report

The 'Defect report' module is a query and reporting module that provides access to the project data. The module provides three different ways to access/view the data:

- <u>Detailed Report</u>
  This module generates a report containing project/defect details. The first step (page) in the process allows the user to select the criteria to apply during the search; the user can select one or many of the following criteria:

  - By Date (Create/Submit date)
  - By Defect Status
  - By Defect Priority
  - By Browser Name
  - By Module Name

Detailed Report

The user is also allowed to specify the 'Sort Order' in which the data will be displayed; by default, the 'Sort Order' is 'ascending'.

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The second step (page) allows the user to enter the criteria's values corresponding to the fields selected in step one. For each search criteria selected a different drop-down menu will be displayed with the possible values available for that criteria (field). In this section the user can also select which fields to display in the output (report).

Finally, the user can also specify how the data should be displayed. By default, the data is displayed in a vertical pattern, with 10 rows of defects displayed on each page. If the horizontal pattern is selected, 5 rows of defects are displayed on each page.

After the user specifies the search criteria and formatting options, the system generates (displays) the report. The 'defect number' is displayed for each matching defect; clicking on this field displays a detailed screen for the defect, and depending on the user's profile changes to the defect's status and description are also permitted.

On the report's (result) page an option for exporting the report to an Excel format is provided; the user can save the Excel report to the local machine or view the report in excel format on the screen.

- Summary Report
  This report generates a report containing summary statistics for the project's defects. This report is especially useful for Project Managers and Managers, as it contains numbers summarizing the progress of a selected Project.

  As with the 'detailed report', the first step (page) in the process allows the user to select the criteria to apply during the search, and the second step (page) lets the user enter the search criteria values to match. The generated report returns the statistics for the matching data formatted as the following sample:

  "The number of defects is 20 for Open criteria"

  "The number of defects is 50 for Close criteria"

  "The number of defects is 80 for Fixed criteria"

  "The number of defects is 8 for Re-open criteria"

- By Defect Number
  This module generates a detailed defect report for a particular Defect Number. It takes the Defect Number as an only parameter and generates the report in the following manner:

  - The Defect Number and Defect Description are displayed

  - Clicking on the Defect Number displays a detailed screen for the defect, and depending on the user's profile changes to the defect's status and description are also permitted.

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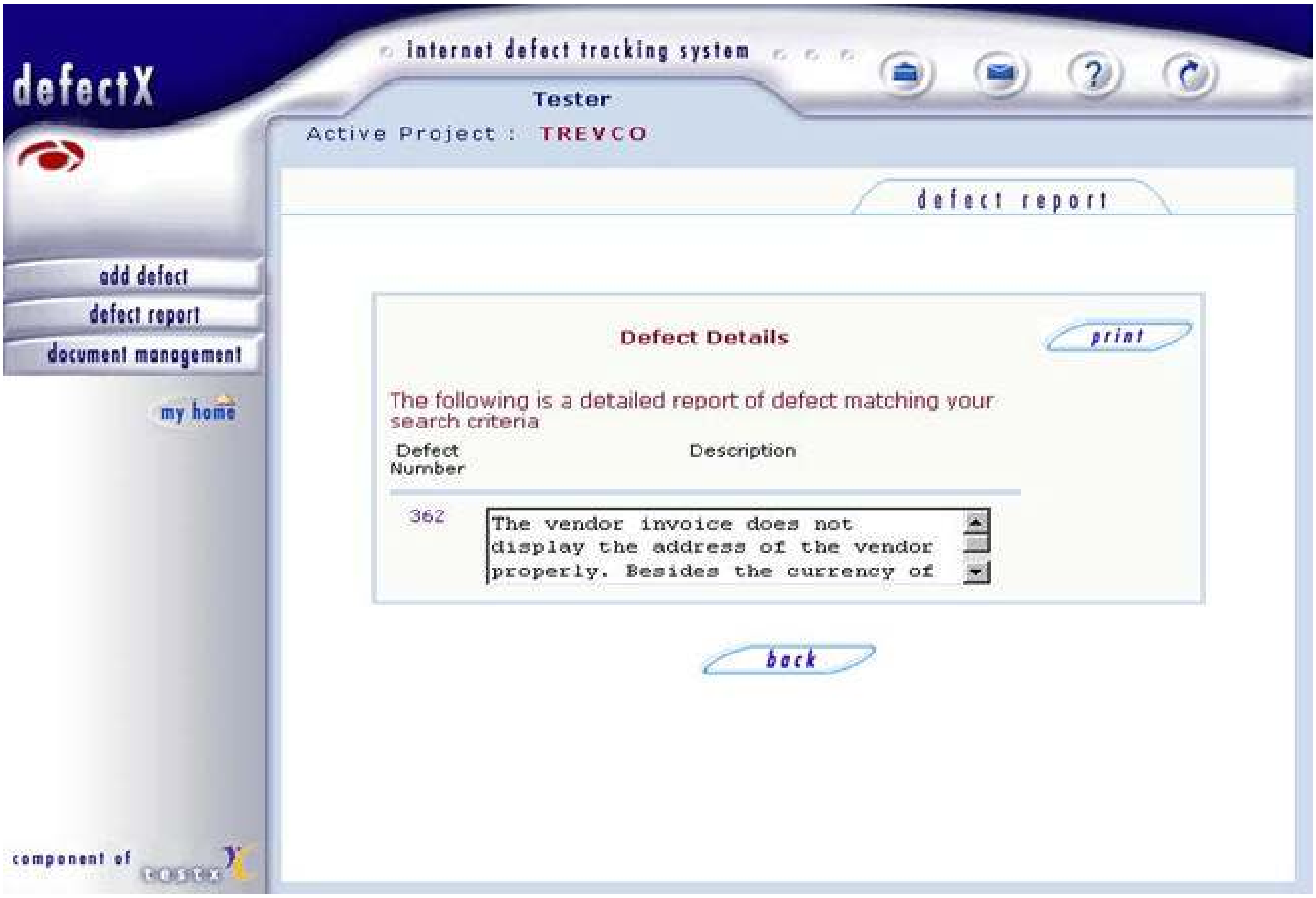
By Defect Number



Document Management

The ‘Document Management’ module allows project document’s to be uploaded and stored on the server so that the can be accessed online by the project team. The system categorizes the documents as either a “Functional’ or a “Test-Case” document. The privilege to view documents under each of these categories is given at the time the Administrator creates (or edits) a user.

- View Document
  Two different sections with a listing of Functional Documents and Test-Case Documents are displayed in this section. This page also provided an option to Add or Delete a Document.

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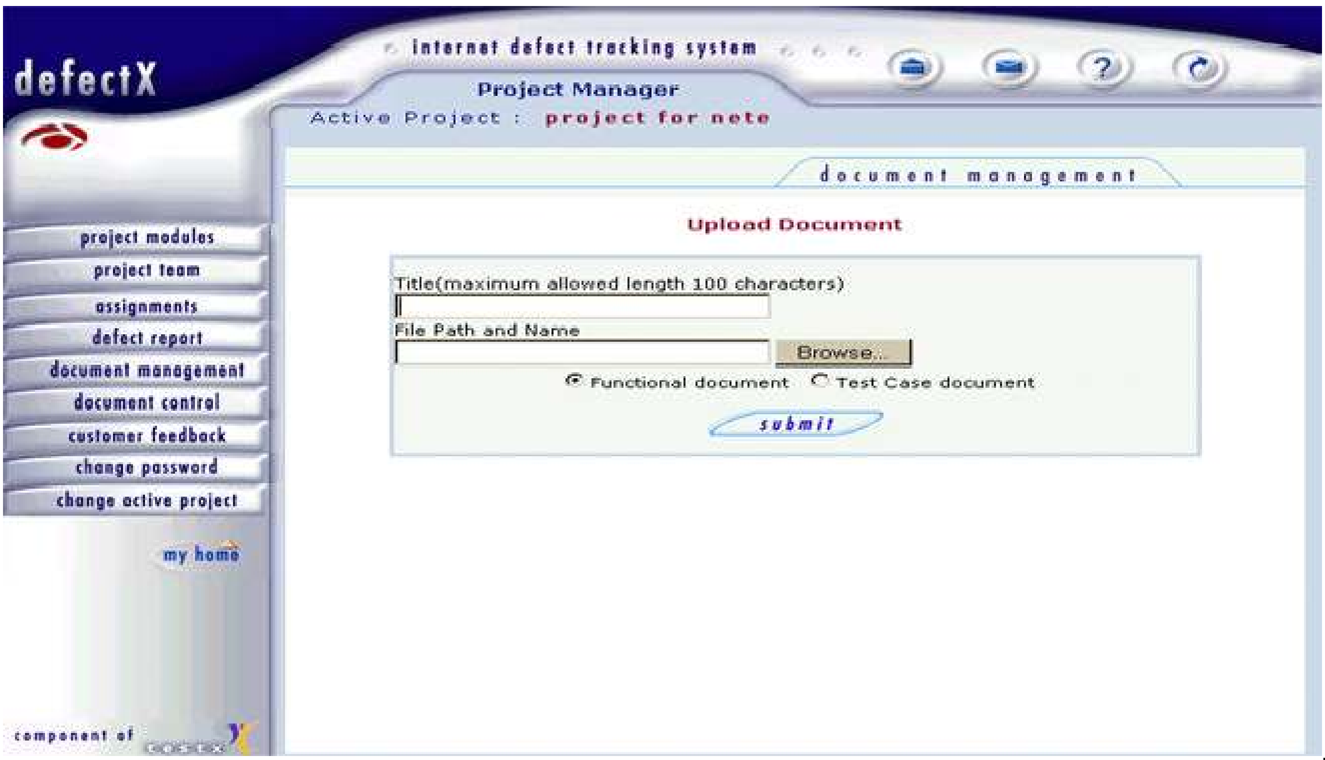
View Document Management

- <u>Add Document</u>
  A user can add a document under the Functional or Test-case categories (the option to add/upload a document depends on the access level set by the Administrator). A client user, by default, has no option to add documents.



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- <u>Modify Document</u>
  A user can upload a newer version of a document. Developers and Testers can only modify documents originally uploaded by them. Project Managers and Managers can modify any project document. Client users have no option to modify documents.

- <u>Delete Document</u>
  Lets users delete a document. Developers and Testers can only delete documents originally uploaded by them. Project Managers and Managers can delete any project document. Client users have no option to delete documents.

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Technical Architecture

DefectX was created using Active Server Pages (ASP), JavaScript, and HTML; the current version of the system runs on a Windows NT/2000 platform, an IIS 4 web server, and a Microsoft SQL Server 7.0 database.

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1. What does defectX aim at?
2. What's the background of defectX.com?
3. What are the system requirements for setting up defectX?
4. What are the purchasing and licensing procedures for defectX.com?
5. Can I use defectX on a trial basis?
6. Is my Data safe and secure?
7. How Do I create a project?
8. How do I create a user?
9. How do I Modify user details?
10. How do I switch from one project to another?
11. What documents can be uploaded on defectX?
12. Is it possible to edit a report?
13. Is it possible to submit bugs for more than one project?
14. Is it possible to fix bugs for more than one project?
15. What is the importance of document management and who can access or authority over the same?
16. Why is test case number important?
17. What is difference between a project module and project?
18. What is document control module used for?
19. Is it possible to delete a defect?
20. What are default values?
21. What is the role of client?
22. Who communicates with client?
23. How can a tester submit or report bug / issue?
24. How can a tester check if the bugs have been fixed?
25. How can a developer fix bugs reported by tester / s?
26. How will I, as a developer know that bugs have been reported for a particular project?
27. What are lookup fields and how can I use them?
28. Can I modify the lookup fields or delete the lookup fields?
29. How do I assign a project to tester?
30. Role of defectX administrator?
31. What is the role of a Project Manager?
32. I have created the testers for project X and when I try to log in as tester the message is displayed "There are no project assigned to you. Please contact defectX administrator"? How can I rectify this problem?
33. While adding the defect as a Tester I do not get the drop down of all the project modules why?

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A.1 defectX, a highly customizable bug tracking solution, enables product development teams to communicate effectively and work in real time. defectX uses a data-centric model that makes it possible for managers, developers, testers, and clients to interact and automate the workflow tasks associated with the assignment, resolution, and reporting of software defects.
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A.2 defectX.com has been around for 1 year. It was started to track customers' bugs and issues. At first, it was just an internal tool, but it quickly became apparent that this would be a valuable service for other development teams. Since then, it has grown quite a bit. There are currently over 250 users on the site and almost 80 projects.
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A.3 IIS Web server on NT/Win2000 with ASP support and a SQL server backend.
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A.4 Option 1: You can use the defectX system for FREE in its current form (ASP model) and location (www.defectX.com). The disadvantage is that it will be running on our servers (our database) - along with other instances of it (other company's instances). No one else will be able to see your data, of course, but it is in a shared environment nonetheless.

Option 2: You can purchase the defectX system for $2,500 (US Dollars) - and set it up inside your facility/network. The system can easily be installed on a IIS Web server on NT/Win2000 with ASP support and a SQL server backend (you will need to get your own SQL Server license). In this option all files will be provided to you to modify and use for your own needs. You can not resell the product of course. You are free to use the product for internal use for as many users and as many projects. You are free to modify the software for your own needs as we will provide source code.

Option 3: Alternately we can also take the case product and customize it further to your particular needs. In this arrangement you would have to pay the $2,500 (US Dollars) plus a fixed price estimate that we would provide to you once the customization requirements are fully specified. As part of this customization we could also create a private label (new look) to match your company's branding. You are free to use the product for internal use for as many users and as many projects. You are free to modify the software for your own needs as we will provide source code.
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A.5 Yes, you can use it on trial basis, as it is available free. Do the online registration at defectx and new account will be created for you.
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A.6 Yes, the data entered by users is very much safe and secure. We have a backup procedure in place and it takes data backup on everyday basis.
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A.7 A new Project can be created in the following two methods: Login as a defectX administrator with correct Login ID and Password.

(a) Select Projects — > View from the left menu on the page.

- The new page with detailed information of projects will be displayed.
- On the top of the page, a link for Adding a Project is provided. Click on the same and a new page for adding a project will be displayed. Please complete the form with necessary details. The project status contains two values Active/Inactive. Please make sure that you select Active as project status. (If the project is given status as “inactive” then it will not be accessible by users and the data will not be displayed for the same). Press submit. The project gets added successfully to the system.

(b) Projects — > Add Project.

- A new form for adding Project details will be displayed. Please add the necessary information. The project status contains two values Active/Inactive. Please make sure that you select Active as project status. (If the project is given status as “inactive” then it will not be accessible by users and the data will not be displayed for the same). Press submit. The project gets added successfully to the system.

This will make a successful project entry in the system.

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A.8 There are five type of different users can be created in the defectX system

Please follow the steps below to create the new user.

- Login as defectX administrator with correct Login Id and password.
- Select Users — > Add account from left menu
- A User details form will be displayed. Please complete the form with the appropriate details.
- On selection of a particular user the new form will be displayed for the sleeted user type. This is because the different users have different access levels and have different operations to perform
- There are five types of users and according to their type the new form will be displayed.

The different types of users are as follows

- Project Manager: This user gets created for a single or multiple projects. While creating this user profile a List box of Active project is displayed and you can choose the project which u want to assign to the user
- Client: This user gets created for single or multiple projects. While creating this user profile a List box of Active project is displayed and you can choose the project which u want to assign to the user
- Manager: This user is assigned to all the active projects in the system no need to do any assignment of the projects.
- Developer: While creating this user profile you do not get the list box of projects. This is because the Project manager of the project assigns the project to this user.
- Tester: While creating this user profile you do not get the list box of projects. This is because the Project manager of the project assigns the project to this user. Complete the form with details and the user will get created in the system. User does not get created for a particular project. But this is a system level account. You can modify the details of user and assign him/her to different projects.

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A.9 There are two methods of modifying user details. Please follow the steps given below:

- Login as a defectX administrator with correct Login ID and Password.

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- Select User -à View module from left menu of page.

A new page with user details will be displayed. A link is provided for the login name of the user. Please click on the user link for which you want to change the details. On clicking this link, a user modify screen will be displayed.

- Select User — > modify user link form the left menu of page.

A new page with drop-down box will be displayed. Please select the name/s of the user/s for whom you want to change the details. Click ‘submit’, the user modification screen will be displayed. Please make necessary changes and click ‘submit’. User details are modified and saved this way.

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A.10 To switch from one project to another select the change project option from the left menu and select the appropriate project. The default project is shown on the top frame of the page and that is considered as current project.

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A.11 Under document management section you can upload only word document in two different categories i.e. Functional Document section and Testcase document section.

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A.12 It is not possible to edit the defect report entirely. But individual defect can be edited by going to particular link of defect.

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A.13 Yes, it is possible to submit bug for more than one project.
For example at present the current project is ABC Corporation and you want to submit bug for XYZ Corporation then select change project option from left menu select XYZ Corporation from list. Now the current project is XYZ Corporation. Select add defect option from the left menu. This will facilitate you to add defect.

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A.14 Yes, it is possible to fix the bug for more than one project. Generate the defect report for the project. Zoom in from defect number and change the status of the defect to fixed press submit and the status of defect will be changed to fixed.

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A.15 Document management section allows keeping all the project related documents at one place. Ideally project manager is allowed to upload the project related documents in two different section i.e. Functional Section and Testcase Section. But if the rights are granted to any user (like Manager, Developer, Tester) by defectX administrator they can also upload the project related document.

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A.16 While adding the New defect for any project you get the option of entering the testcase number. The testcase number is an optional field and that field is given for capturing the extra information.

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A.17 The relation between project and project module is like parent and child.
Project is main identity i.e. parent and project modules are Childs i.e. logical subunits of project.
Example:
Project:ABC Corporation.
ProjectModules:
Accounts
Materials
Enquiries
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A.18 Document control module is given to project managers. This option facilitates project managers to give access to developers and testers to view and add documents.
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A.19 No, it is not possible to delete the defect.
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A.20 At stage of new account creation of defectX administrator a set of default values are generated for the following categories
Defect Priorities: Open, Low, High
Defect Status: close, fixed, important, differed for phase two
Defect Browser: IE (4.0), IE (5.0), and NE
Defect Resolution: 800x600, 600x480, 1024x748
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A.21 Client profile is created to give filtered information to the client of project. This user can see the document related to his project, see the defect report and progress of the project at the same time he can send the feedback to the project manager i.e. any problem he is facing while going through the site.
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A.22 Project manager from the development group communicates with client. He takes care of all the correspondence through the email facility provided at defectX.com
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A.23 Tester profile has given the module called Add defect. With help of this module tester can add the new defect with the specifications like the defect priority, defect status, a particular browser and a particular project module.
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A.24 defectX.com provides a reporting tool called Defect Report. With the help of this tool tester can generate report for a particular criteria and see the status of defect or he can directly submit the defect number and view the defect details.
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A.25 There are two methods for fixing the bug.
After login developer gets the list of defect assigned to him on his home page. He can zoom in to particular defect from the link provided on create date. A new page with defect details will

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appear this place will give him facility to add his comments and change the status of defect. Second method is to generate the defect report for specific criteria and zoom in from Defect number and change the status of the defect.
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A.26 Once the bug is reported for the project as a developer you will receive the email as a notification. At the same time when you will login to the defectX.com you will see the newly reported defect on the home page.
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A.27 Lookup fields are customized fields provided for capturing the additional information. In simplest terms they can be defined as additional fields, which can be created for the forms like Project, Users and Defect. Following methods can create these Please follow the steps below to add new lookup field.

- Login as defectX administrator with login id and correct password
- Select Lookup fields — > View module from left menu.
- You can see three tables with details of lookup fields created for the categories like Project, Users, and Defect. (You can create maximum five lookup fields for each category).
- On top of the page you can see one more link called Add lookup field. Click on the same a new page will be displayed with the form for adding lookup field. Please add the field name. (Make note of the fact that at a time you can add only one lookup filed for one category). Press submit a new filed is added and you can see the listing on the view page of lookup field.
- E.g. if I am adding Project details as lookup field under project category. I can see this additional field when I create the new project.
- The second method of adding a new lookup filed as follows
- Select Lookup fields -à Add lookup filed menu
- New form for adding lookup field. Please add the field name. (Make note of the fact that at a time you can add only one lookup filed for one category). Press submit a new filed is added and you can see the listing on the view page of lookup field.
- E.g. if I am adding Project details as lookup field under project category. I can see this additional field when I create the new project.

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A.28 Yes, you can log in as administrator and do the required changes to the lookup fields or delete the lookup fields till the time they are not used in the system. (I.e. till there is no entry of project or user or defect with the lookup filed). You cannot delete the lookup filed which is used in the system.
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A.29 Assignment can be done for a person or can be done for a particular project module.
Please follow the given steps below

- Login as Project manager with Login ID and correct password.

First method of assignment:

- Select Project module — > View: A list of project modules with the options of edit / delete / assignment will be displayed. This assignment is done for a particular project module. Click on the assignment link in front of your project module for which you want to do assignment. On submit the current assignments and option to modify and delete assignments will be displayed. Select appropriate action and complete the operation

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Second method of assignment:

- Select Project Team: This page will display the details of Developers and testers involved in the project. Click on the link of assigned modules (last column in the table). A page will be displayed with pre-selected list of project modules. Do the required changes and press submit.

Third method of assignment:

- Select Assignment — > Add assignment: This page will display the dropdown box with the names of Project modules. Please select the project modules for which u wish to do the assignment. Press submit a new page will be displayed with current assignment chart and a list box with the names of all the developers and testers. Please do the appropriate the selections and presses submit.

Fourth method of assignment:

- Select Assignment — > Multiple selection: This page will display two list boxes. A list box with the names of developers and a list box with names of project modules. Please read all the instructions mentioned on this page this is multiple selection option means at a time n number of users will be assigned to the n number of project modules selected.

Fifth method of assignment:

- At stage of project module creation stage user gets an option to add the assignment for the newly created project module.

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A.30 ‘defectX Administrator’ is the Super User for the corporate account. The administrator is treated as the main entity and has access to all the tools and facilities to operate and maintain the system.

Say we have defectX administrator Mr. Thomas lara. We can see how he manages his corporate account.

- Login as Thomas/Thomas
- Mr. Thomas gets his home page with listing of the entire active Projects and the defined system parameters - such as Defect Status, Defect Priorities, Browsers, and Screen Resolutions. The listing of Lookup fields (these are customizable data fields for user, project and defect data) is also displayed if they have been created in the system.
- Mr. Thomas first job is to create the project with necessary data. So Mr. Thomas creates the project ICBI Corporation.
- Next job is to create the project manager, developer, tester, manager and client account with the necessary details
- So Mr. Thomas creates account as Alan/Alan as Project manager and assigns ICBI Corporation project to him.
- Next account is for manager Mr. Bill. Manager account need not require any project assignment as he can access all the active projects. So the next account is of manager bill/ bill • Next accounts are for developer jim and magi . Jim is developer and magi is tester. While creating the accounts for developer and tester administrator does not get option to assign project . Please make not of this. This is because the team members work allocation and task assignment is duty of project manager so assignment of project to developers and testers is done only by project manager. So the new account s are created as Jim/Jim and magi/magi.
- Next account is for Mr. max who is client of ICBI Corporation. The project ICBI Corporation is assigned while creating this account. So the account is max/max
- Mr. Thomas lara will be creating the necessary master data with the help of modules like defect status, defect priorities, browsers and screen resolutions. (The master data is

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populated for each account at creation of corporate account. Please make note of this)

- Lookup fields is facility provided for creating the customized fields for capturing the additional information for the categories like project, users, defect.
- Change password will allow Mr. Thomas to change his password at any point of time for security.

So this is all about the role of defectX administrator.

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A.31 The defectX administrator creates project manager profile. Project manager is responsible for overall administration of the project. This can be explained with the example as below. Say we have project manager Mr. Alan Cook and he is been assigned to project ICBI Corporation. So lets see what all are his duties and how does he perform him. To perform his duties Mr. Alan cook has to log in as to defectX.com

- Login as Alan/ Alan
- Mr. Alan gets his home page after logging in. He gets all the project related required information on this home page.
- First job of Mr. Alan is to divide the project into logical units. And create the project modules. Say ICBI Corporation project can be divided into five logical units as follows: Enquiry module, Operations, Payments, Customer feedback, Reports.
- Project module creation activity can be done by The menu link Project module — > Add project module
- Now the next step is to assign these newly created project modules to the developers and testers of the project. This is very necessary step as it unable the developers and testers to log in to defectX and access the data. (This is the first time developers and testers get assigned to project. Without this step the developers and testers can not access the project data)
- This assignment of project modules will makes the developers and testers functional and they can log in with their login ids /passwords to defectX.com site to perform their task
- Next main task for Mr. Alan is to do document management. With the links of document management section Mr. Alan can upload the project documents in Word format to the defectX.com site. The main objective is to create the repository for the project documents so all the people involved in the project can view these document with their access levels. The word documents can be added / Modified and deleted from this section by project manager i.e. Mr. Alan.
- Developers and testers are given the access to documents form the section document control. Mr. Alan has to perform this task as project manager. This section has two sub categories View and document access. View will list the names of developers, testers and their access level and document access will allow to set permission for a particular developer or tester. o The next section is customer feedback. This section list the customer feedback in two different categories Unread messages / All messages. Project manager has provision to reply the client from the view screen
- The important section is defect report. This is enhanced reporting tool and will help project manager to control the project in effective way. The reports are generated in three different formats.
- Detailed: This is detailed report. You have the option of selecting any combination of criteria’s. And selecting the display fields and sort order as well as display pattern.
- Summary: This is summary report and will only display the defect counts for given criteria.
- By defect Number: This will generate report for given defect number.
- Change password facility is given for security. Project manager can change the password at any point of time.
- Project team menu will show the details of developers and testers associated with this

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report.

So this is all about the role of Project manager.

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A.32 This message is displayed because the newly created tester is not been assigned to any project. To assign the tester to any project. Login as project manager and then follow the given step below.

First method of assignment:

- Select Project module — > View: A list of project modules with the options of edit / delete / assignment will be displayed. This assignment is done for a particular project module. Click on the assignment link in front of your project module for which you want to do assignment. On submit the current assignments and option to modify and delete assignments will be displayed. Select appropriate action and complete the operation

Second method of assignment:

- Select Project Team: This page will display the details of Developers and testers involved in the project. Click on the link of assigned modules (last column in the table). A page will be displayed with pre-selected list of project modules. Do the required changes and press submit.

Third method of assignment:

- Select Assignment — > Add assignment: This page will display the dropdown box with the names of Project modules. Please select the project modules for which u wish to do the assignment. Press submit a new page will be displayed with current assignment chart and a list box with the names of all the developers and testers. Please do the appropriate the selections and presses submit.

Fourth method of assignment:

- Select Assignment — > Multiple selection: This page will display two list boxes. A list box with the names of developers and a list box with names of project modules. Please read all the instructions mentioned on this page this is multiple selection option means at a time n number of users will be assigned to the n number of project modules selected.

Fifth method of assignment:

- At stage of project module creation stage user gets an option to add the assignment for the newly created project module.

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A.33 While adding the defect as tester you will get only those projects in drop down which are been assigned to you by project manager. Please contact your project manager and ask him to assign you to all the project modules. This will solve your problem and will allow adding defect for all the modules.

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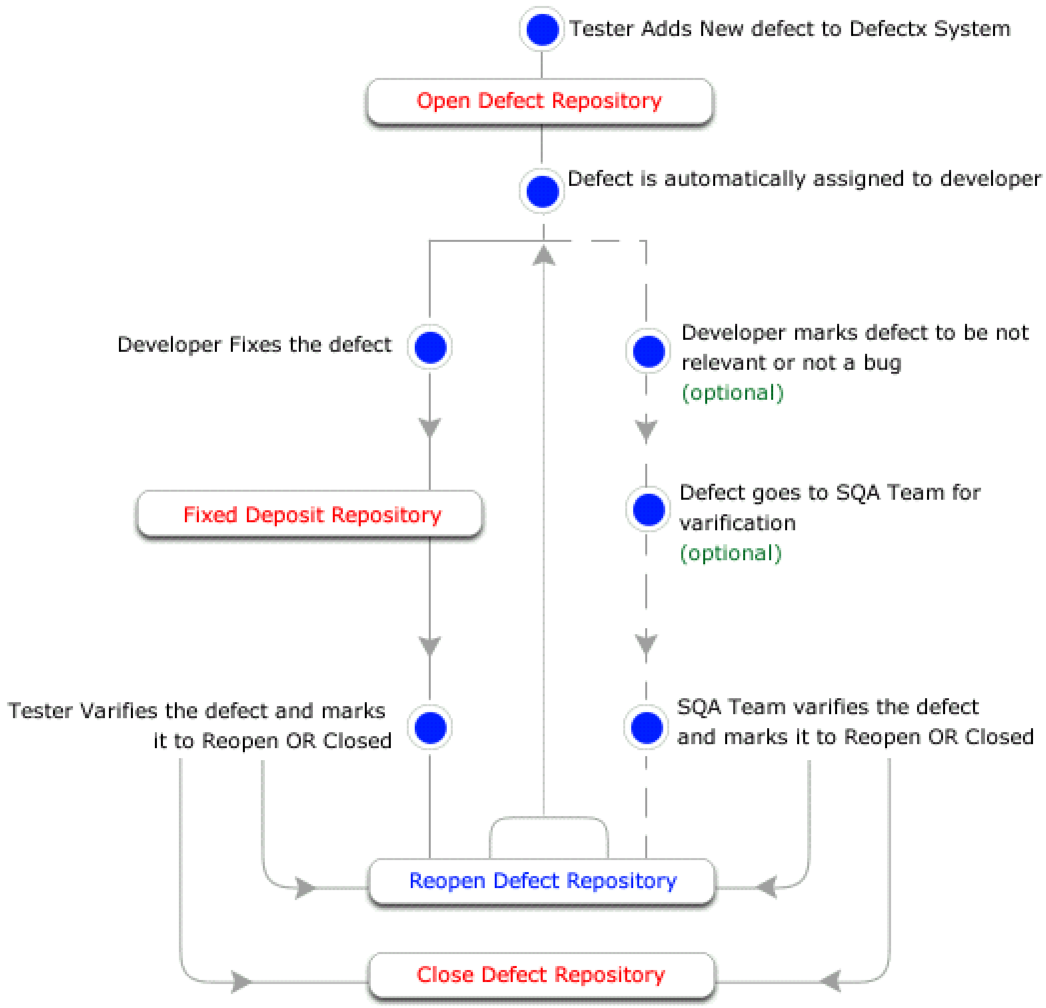
defectX overview



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