

**Serena® TeamTrack®
REVIEWER'S GUIDE**

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Welcome to TeamTrack

This document describes how to explore Serena® TeamTrack® 6.5, a product of Serena Software, Inc. TeamTrack is a Web-architected change request and process management solution that empowers application development teams to improve communication and development processes across the enterprise.

Audience and scope

The TeamTrack Installation program provides a Sample database that enables you to explore TeamTrack's features and functionality. This guide explains the basic functionality of the browser interface and provides an introduction to the Administrator client. You will learn how to use the Issue Management Solution to track issues, as well as how you can configure TeamTrack to fit your needs.

This guide is intended for users who are considering purchasing and implementing Serena TeamTrack. If you have any questions while using this guide, contact a Serena Software sales representative.

Before following the instructions in the guide, download TeamTrack from www.serena.com and run the installation package. For instructions on installing TeamTrack, refer to the *Serena TeamTrack Installation and Setup Guide*.

Navigating this book

This guide is organized as follows:

- [Chapter 1, "Installing an Evaluation Version of TeamTrack"](#) - Provides instructions for installing an evaluation copy of TeamTrack. Instructions are provided for the Windows, Solaris, and Linux versions.
- [Chapter 2, "Reviewing the Browser Interface"](#) - Provides instructions for logging on to and navigating the TeamTrack browser user interface and for following a change request as it completes the software development process.
- [Chapter 3, "Reviewing the Administrator Client"](#) - Provides an overview of the TeamTrack Administrator client, where workflows and projects are defined, user accounts are established, and system settings are applied.

Guide to TeamTrack Documentation

The following sections provide basic information about TeamTrack documentation.

TeamTrack Documentation Suite

The TeamTrack documentation set includes the following manuals in PDF format. Most documents are installed with TeamTrack; to obtain a document that is not installed with the product, contact a Serena Software sales representative.

Manual	Description
Serena® TeamTrack® Administrator's Guide	Provides information on configuring and administering TeamTrack.
Serena® TeamTrack® User's Guide	Provides information about the TeamTrack browser interface and is intended for end users. Instructions on using the browser interface, including TeamTrack's robust reporting feature, are included as well. To ease the process of providing a copy for every user in your system, the <i>Serena TeamTrack User's Guide</i> is provided in PDF and can be accessed from the Product Information tab of the About page in the TeamTrack browser interface.
SourceBridge User's Guide	Provides information on installing, configuring, and using the SourceBridge extension. The guide is intended for end users who integrate TeamTrack with version control software used within the integrated development environment (IDE) or within the Serena Version Manager Windows or Web clients. The <i>SourceBridge User's Guide</i> is provided in PDF and can be accessed from the Product Information tab of the About page in the TeamTrack browser interface.
TeamScript Reference Guide	Provides information on customizing TeamTrack using TeamScript, a programming language built around VBScript 4.0. This guide is intended for VBScript programmers who want to use TeamScript to implement custom features in your TeamTrack system.
Serena® Tracker™ toTeamTrack® Migration Guide	Describes the issues and decisions you need to make to successfully migrate from Tracker to TeamTrack. An overview of the process is also provided.
ProjectBridge User's Guide	Provides information on setting up and using the integration between Microsoft Project® and TeamTrack.
TeamTrack® for ChangeMan® ZMF Solution Guide	Explains how Serena® ChangeMan® ZMF integrates with TeamTrack to help you manage changes to your mainframe code.
TeamTrack® for SAP Guide	Describes the integration between Serena TeamTrack, Serena® ChangeMan® DS, and SAP Transport Management Systems.
Serena® TeamTrack® TestBridge for Mercury Quality Center™ Integration Guide	Provides information on setting up and using components that allow integration between Mercury Quality Center and TeamTrack. This manual is designed for TeamTrack and TestDirector administrators.

Using the Manuals

The PDF manuals include the following features:

- **Bookmarks** - All of the manuals contain predefined bookmarks that make it easy for you to quickly jump to a specific topic. By default, the bookmarks appear to the left of each online manual.
- **Links** - Cross-reference links within an manual enable you to jump to other sections within the manual and to other manuals with a single mouse click. These links appear in blue.
- **Printing** - While viewing a manual, you can print the current page, a range of pages, or the entire manual.
- **Advanced search** - Starting with version 6, Adobe Reader includes an advanced search feature that enables you to search across multiple PDF files in a specified directory. (This is in addition to using any search index created by Adobe Catalog—see step 3 below.)

To search within multiple PDF documents at once, perform the following steps (requires Adobe Reader version 6 or higher):

- 1 In Adobe Reader, select Edit | Search (or press CTRL+F).
- 2 In the text box, enter the word or phrase for which you want to search.
- 3 Select the **All PDF Documents in** option, and browse to select the folder in which you want to search.
- 4 Optionally, select one or more of the additional search options, such as **Whole words only** and **Case-Sensitive**.
- 5 Click the **Search** button.



NOTE Optionally, you can click the **Use Advanced Search Options** link near the lower right corner of the application window to enable additional, more powerful search options. (If this link says **Use Basic Search Options** instead, the advanced options are already enabled.) For details, see Adobe Reader's online help.

Accessing Online Help

The following online help is installed with TeamTrack:

- **Serena® TeamTrack® Administrator Online Help** - Provides detailed information about specific features and properties in the Administrator client. To access online help, click the **Help** button located on each tab and dialog box in the Administrator client, or select **Help Topics** from the **Help** menu.
- **Serena® TeamTrack® Browser Online Help** - Provides information operating TeamTrack. To access online help, click the **Help** link on the toolbar or the **Help** icon located on each page and frame.

Terminology Conventions

The following terminology conventions are used throughout TeamTrack documentation to discuss the following elements:

- **Items:** Generic term that encompasses both primary and auxiliary items, including issues, incidents, contacts, and problems. Reports are also referred to generically as items.
- **Primary Items:** Items like issues and incidents, which are stored in a Primary table and follow a workflow process.
- **Auxiliary Items:** Items like contacts, companies, and problems, which are stored in an Auxiliary table and do not follow a workflow process.

Chapter 1

Installing an Evaluation Version of TeamTrack

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Installing the Windows Version

TeamTrack can be installed for a 30-day evaluation period. To continue using TeamTrack after the evaluation period, you must install the Serena License Manager, add permanent licenses, and specify a license server in the TeamTrack Administrator client. For details, refer to the *Serena TeamTrack Installation and Setup Guide*.

To install an evaluation copy of TeamTrack:

- 1 Download TeamTrack from <http://www.serena.com>.
- 2 Launch the TeamTrack.exe file. After installation files are extracted, the **Welcome** dialog box opens. Click **Next** to continue.
- 3 Read through the license agreement text on the **Master License Agreement** dialog box, and then select **I Accept the terms of the Master License Agreement**. Click **Next**.
- 4 The **Master License Agreement Confirmation** dialog box opens. Select **I confirm my acceptance of the terms of the Master License Agreement**, and then click **Next**.
- 5 The **Choose License Server** dialog box opens. Select the **Install 30-day Evaluation Licenses** option, and then click **Next**.
- 6 The **Setup Type** dialog box opens. For best results during your evaluation period, select the **Complete Installation** option, and then click **Next**.
- 7 If you selected a complete installation, the **Select a Web Server** dialog box opens. If you do not have a supported Web Server installed, setup defaults to the TeamTrack Web Server and this dialog box does not open. Select one of the following Web Server options:
 - **TeamTrack Web Server** - Serena Software recommends this option be used for evaluation purposes. If you want to upgrade to Microsoft IIS Web Server later, you can re-install TeamTrack to configure IIS virtual directory settings.
 - **Microsoft Internet Information Server** - Select this option if Microsoft IIS Web Server is installed on your machine and you wish to use it during your evaluation period.
 - **Other Supported Web Servers** - Select this option if you have installed and are using iPlanet, Sun Java System Web Server, or another supported Web Server. Instructions for setting up TeamTrack manually on an iPlanet or Sun Java System Web Server are available from Serena Software.
- 8 If you selected the Microsoft Internet Information Server option, you must specify the IIS Web site that will contain the TeamTrack virtual directories. From the **Select IIS Web Site for TeamTrack** dialog box, select the IIS Web site where you want to create the TeamTrack virtual directories. The default Web site will generally be selected for you in this dialog box. This is typically the Web site selection you want to use.
- 9 From the **Choose Destination Location** dialog box, accept the default destination folder or browse for a different location, and then click **Next**.
- 10 From the **Select Program Folder** dialog box, accept the default program folder, which is *Serena\TeamTrack*, or rename the program folder. Click **Next** to continue.

- 11** From the **Start Copying Files** dialog box, confirm the components that will be installed, and then click **Next**.
- 12** The **Stop Services** dialog box opens. Click **Next** to stop services that are running on the server.
- 13** The **Setup Complete** dialog box opens. You can select to open the readme file. Instructions on connecting to TeamTrack using a browser are also provided. Click **Finish** to install TeamTrack on the server.

TeamTrack automatically connects to the Sample database after a new installation. Instructions for evaluating TeamTrack using the Sample database are provided in ["Reviewing the Browser Interface" on page 15](#).

Installing the Solaris or Linux Version

The following instructions provide general guidelines for installing an evaluation copy of TeamTrack for Solaris and TeamTrack for Linux. Full installation instructions are provided in the install.txt file included in the tar files for these versions.

The installation process involves the following basic steps:

- 1** Install and configure Apache Web server.
- 2** Install TeamTrack for your particular Web server platform.
- 3** Install the Administrator client on a Windows server or workstation.
- 4** Launch Apache and verify that TeamTrack is running.

Installing and Configuring Apache Web Server

TeamTrack runs as an ISAPI extension in Apache. When you build Apache, you must specify that it is to include support for the ISAPI module. Because this option defaults to false, you will most likely need to build Apache. Alternatively, you can use the pre-built Apache package shipped with TeamTrack.

If you use the pre-built version of Apache shipped with TeamTrack, you must install it to /usr/serena/apache. If you already have Apache installed in that location, you cannot use the pre-built version without deleting your current installation.

For instructions for installing Apache Web server for TeamTrack, refer to the install.txt file provided with your package.

Installing TeamTrack Components on the Web Server

To install TeamTrack for Solaris and TeamTrack for Linux components:

- 1 On the server on which you installed Apache, decide where to install TeamTrack and DataDirect ODBC drivers. Serena recommends that you use the default location `/usr/serena/teamtrack`.



NOTE When you install and run Apache and TeamTrack, Serena recommends you do so as the same user. The Apache user ID must be able to read and write to the files in the TeamTrack directory.

- 2 Unpack the `TeamTrack.tar.gz` file for the platform you are installing. This step creates a directory where the installation media will be stored. This directory will be named "TeamTrack". After installation is complete, this directory can be deleted or you can keep it if you want to re-install at a later date.
- 3 Follow the instructions in the "TeamTrack Installation" section of the `install.txt` file.

Installing the TeamTrack Administrator Client

TeamTrack for Solaris and TeamTrack for Linux must be administered through the Administrator client, which must be installed on a Windows server or workstation. The Administrator client enables you to administer TeamTrack either through an ODBC connection or Remote Administration.

To install the TeamTrack Administrator client:

- 1 On a Windows workstation or server, run the `TeamTrack.exe` file included in your TeamTrack package.
- 2 Read through the license agreement text on the **Master License Agreement** dialog box, and then select **I Accept the terms of the Master License Agreement**. Click **Next**.
- 3 The **Master License Agreement Confirmation** dialog box opens. Select **I confirm my acceptance of the terms of the Master License Agreement**, and then click **Next**.
- 4 On the **Choose License Server** dialog box, select the **Install 30-day Evaluation Licenses** option, and then click **Next**.
- 5 On the **Setup Type** dialog box, select **Complete Installation** or **Setup for Notification Server Only**, and then click **Next**.
- 6 Depending on the Web server software that is installed on the Window machine, the **Select a Web Server** dialog box may open. Select the **TeamTrack Web Server** option, and then click **Next**.
- 7 From the **Choose Destination Location** dialog box, accept the default destination folder or browse for a different location, and then click **Next**.
- 8 From the **Select Program Folder** dialog box, accept the default program folder, which is `Serena\TeamTrack`, or rename the program folder. Click **Next** to continue.
- 9 From the **Start Copying Files** dialog box, confirm the components that will be installed, and then click **Next**.

- 10** The **Stop Services** dialog box opens. Click **Next** to stop services that are running on the server.
- 11** The **Setup Complete** dialog box opens. You can select to open the readme file. Instructions on connecting to TeamTrack using a browser are also provided. Click **Finish**.
- 12** Import the sample.dmp file into an Oracle instance. The sample.dmp file is located in serena/teamtrack/database/sample.dmp.
- 13** Launch the Administrator client, and then connect to the Sample database you imported into Oracle. (Open the **Connect** dialog box by selecting **Connect** from the **File** menu.)
- 14** Verify that you are running an evaluation copy of TeamTrack by selecting **License Options** from the **Options** menu. The word "EVAL" should be set in the **Host Name** box on the **License Options** dialog box.

Launching Apache and TeamTrack

The final step is to launch TeamTrack on the Apache Web server.

To launch Apache and TeamTrack, run:

```
> cd serena/teamtrack/bin  
> ./ttctl teamtrack
```

To stop Apache and TeamTrack, run:

```
> ./ttctl teamtrack stop
```

To start the TeamTrack Mail Client and Notification server, run:

```
> ./ttctl mailclient  
> ./ttctl notifications
```

Verify that TeamTrack can be launched using the following URL:

<http://hostname:portnum/tmtrack/tmtrack.dll?>

Uninstalling TeamTrack

To uninstall TeamTrack:

- 1** Select **Add/Remove Programs** from the Windows Control Panel.
- 2** Select Serena TeamTrack from the list, and then click **Change/Remove**.
- 3** Follow the instructions provided by the uninstall wizard.

Chapter 2

Reviewing the Browser Interface

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Introduction to the Browser Interface

The browser interface is TeamTrack's end-user interface. Users access the tracking system on the Internet or Intranet using a standard Web browser. The browser interface enables users to:

- Submit, transition, and update primary items that follow a workflow process.
- Manage Auxiliary table information that supports the workflow process, such as companies, contacts, and Knowledge Base problems and resolutions.
- Create, edit, and run reports related to both primary and auxiliary items.
- Attach files, notes, and e-mail messages to items.
- Link TeamTrack items together.
- Send e-mail associated with primary and auxiliary items or their attachments.
- Send links to reports through e-mail.
- Organize primary and auxiliary items in folders.
- Search for items they have privileges to view.
- Modify their user profile.
- Self-register (for external users only).
- Access the TeamTrack Knowledge Base.

For detailed information on these and other TeamTrack end-user capabilities, refer to the *Serena TeamTrack User's Guide*.

Using the Browser Interface

The browser interface is organized by solutions, which are based on Primary tables and include fields, workflows, projects, notifications, reports, tables, table relationships, scripts, and more. Solutions enable users to track items that follow a workflow process, gather information for Auxiliary items that support but do not follow that process, and generate reports.

Features set up in the Administrator client are reflected in the browser interface. For example, users have privileges to view certain items and to perform certain tasks with items in the browser interface. These privileges are assigned in the Administrator client, which is discussed in the ["Reviewing the Administrator Client" on page 33](#).

Users have two choices for accessing TeamTrack:

- **Launch Page** - A simplified version of the full TeamTrack interface. For details, refer to ["Using the TeamTrack Launch Page" on page 17](#).
- **Full TeamTrack Interface** - Provides easy access to all functionality based on a user's product-access level and privilege set. For details, refer to ["Using the Full TeamTrack Interface" on page 17](#).

Users can easily toggle between the **Launch** page and the full interface.

Using the TeamTrack Launch Page

The **Launch** page is a user's default home page and provides links to frequently used information and features. From the **Launch** page, users can easily:

- Perform common tasks, such as submit items and search for items.
- View items in Favorites folders. Favorites enable users to add links to frequently used features, forms, items, and reports to folders that you create or that are provided by the system. Favorites provide a personal view of items in the system; other users cannot view your favorites, nor can you view other users' favorites.

Figure 2-1 shows an example of the **Launch** page.

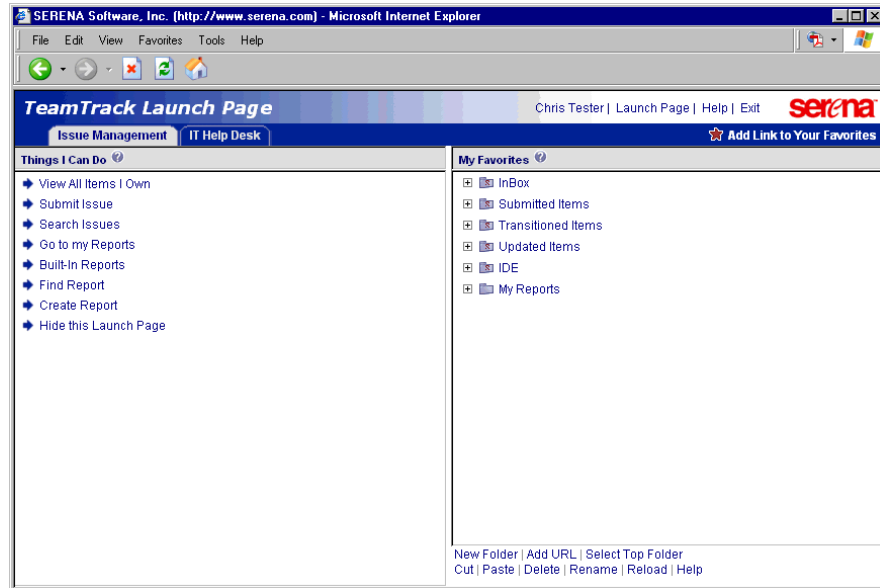


Figure 2-1 . The TeamTrack Launch Page

Using the Full TeamTrack Interface

The full TeamTrack interface provides easy access to all functionality based on a user's product-access level and privilege set. Figure 2-2 shows an example of the full TeamTrack interface.

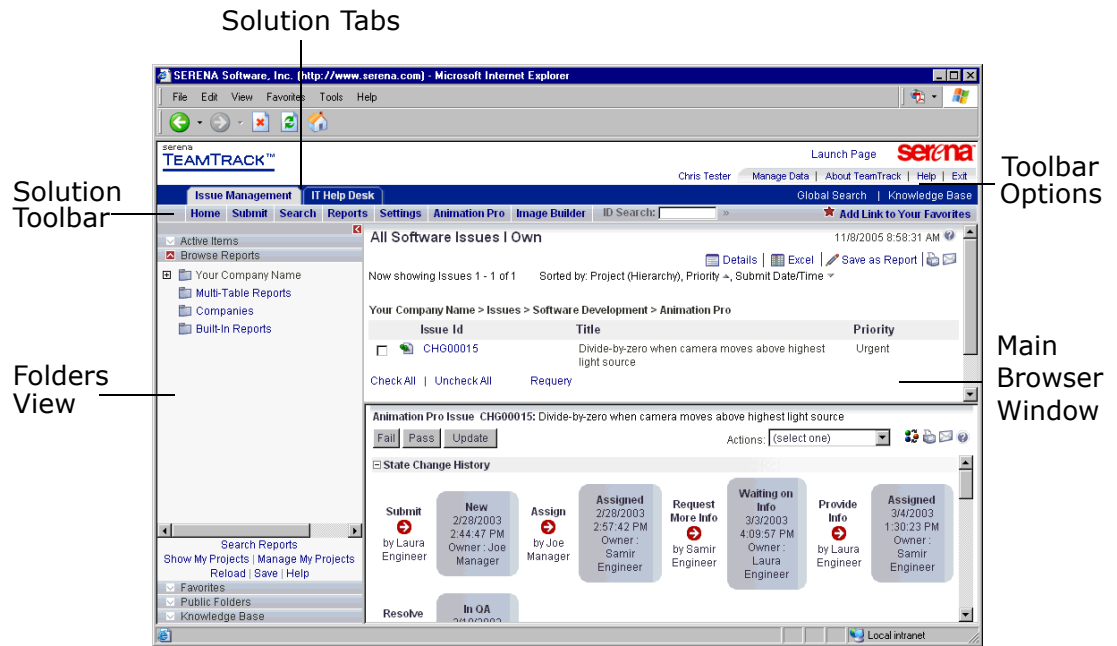


Figure 2-2 . The Full TeamTrack Interface

The full TeamTrack interface is divided into three main sections:

- **Toolbar** - The TeamTrack toolbar has three sections:
 - **Solution Tabs** - TeamTrack solutions are organized in tabs. TeamTrack solutions are comprised of items that are stored in a single primary table. Each solution uses a set of projects, workflows, fields, reports, and notifications that define a process for those items. The **Solution** tabs available to users are based on their user privileges. **Figure 2-2** shows the full interface for Chris, who has privileges to the Issue Management and IT Help Desk solutions, and tabs for these solutions are available to him. Chris can select a **Solution** tab to filter the buttons on the **Solution** toolbar and items in the Folders view for each solution.
 - **Solution Toolbar** - The **Home**, **Submit**, **Search**, **Reports**, and **Settings** buttons and the **ID Search** option apply to the selected **Solution** tab.
 - **Toolbar Options** - Non-solution related toolbar options include the **Knowledge Base**, **Manage Data**, and **Global Search** options.
- **Folders View** - The **Folders View** provides easy access to active items in selected projects, reports, and favorite, public, and Knowledge Base folders.
- **Main Browser Window** - In general, the main browser windows contains two views:
 - **Items Lists** - Item Lists are typically generated from report and search queries and when users display the contents of folders.
 - **Item Details** - The **Item Details** frame displays details for items selected in the **Item List** frame. User profile settings determine how the **Item Details** frame displays. For example, users can choose to view items in a single-frame view, or in two frames with the item lists at the top and the item details at the bottom. Depending on a user's privileges, he or she can work with individual items in the **Item Details** frame by updating data in them or transitioning them to another state in the workflow, or by adding notes and attachments to them.

For details on the navigating the browser interface, refer to *Serena TeamTrack User's Guide*.

Using a TeamTrack Process

TeamTrack issues and incidents are primary items that follow a workflow process. Primary items are submitted into projects, which are assigned a workflow. Each workflow contains states and transitions. States are the stopping points along a workflow's path; transitions move items from one stopping point to the next. Data pertaining to these items is collected as items move from state to state. Fields are used to gather data from users as they transition items.

In this guide, the term "issue" is used to describe the Issue Management solution.

The following tutorial explains how to use the TeamTrack Sample database to:

- 1 Log in to TeamTrack. For details, refer to ["Logging on to TeamTrack" on page 19](#).
- 2 Submit an Issue. For details, refer to ["Submitting an Issue" on page 20](#).
- 3 Track the issue through a workflow. ["Tracking an Issue Through the Workflow" on page 22](#).
- 4 Search for the issue you submitted. For details, refer to ["Using Search Features" on page 27](#).
- 5 Create a report that returns the issue. For details, refer to ["Using Reports" on page 28](#).

Logging on to TeamTrack

To log on to the browser interface using the Sample database:

- 1 Verify that the Web server you are using is running. If you are using the TeamTrack Web Server during your evaluation period, you can verify that it is running by launching the Administrator client, and then selecting **Manage Services** from the **Options** menu. For more information on working with Web servers, refer to *Serena TeamTrack Administrator's Guide*.
- 2 After you verify that your Web server is running, log on to TeamTrack using one of the following methods:
 - Double-click the **TeamTrack 6.5** program shortcut located in the TeamTrack program group.
 - From the **Start** menu, select **Programs, Serena, TeamTrack**, and then select **TeamTrack 6.5**.
 - In the **Address Bar** of your browser, type the URL provided in the **Setup Complete** dialog during installation. An example of the TeamTrack URL is `http://servername/TeamTrack`.



NOTE By default, TeamTrack uses port 80. If you are using a different port for TeamTrack, specify that port number as part of the URL as follows:
`http://servername:81/TeamTrack.`

- 3** The **Welcome to the TeamTrack Evaluation** page opens. Click the **Login to TeamTrack** link.
- 4** The **Login to the TeamTrack Evaluation Sample** page opens. Several logon IDs for sample user roles are listed on the window. You can choose to log on as one of the listed users and explore the Sample database on your own or follow the remaining steps in this section. For this example, the login user Chris is initially used to submit a change request. Chris is a Quality Assurance tester who submits issues such as bug reports, change requests, and enhancement requests into the Software Issues workflow. To log in as Chris, scroll to his description in the roles list, and then click his name.
- 5** The **Login to TeamTrack** page opens. In the **User ID** box, type Chris. Leave the **Password** box empty.
- 6** Click **Login**. TeamTrack opens to the **Launch** page, which provides links to the most commonly used tasks.

Submitting an Issue

The following steps explain how to submit a new issue into the Image Builder project while logged in as Chris. The Image Builder project follows the "Software Issues" workflow, or process.

To submit a new issue:

- 1** In the **Things I Can Do** pane of the **Launch** page, click the **Submit Issue** link.
- 2** The **Submit Tree** opens; click the **Image Builder** project link.
- 3** The **Submit** form for the Image Builder project opens, as shown in [Figure 2-3](#). Notice that some field labels are displayed in red text with an asterisk. This indicates that these fields are required and that Chris must provide data in these fields before submitting an issue. This ensures that necessary, relevant information is provided for each issue. In addition, notice that the **Submit** form is divided into sections. You can control security by placing fields in or removing fields from these sections, and then granting users privileges to view and update fields in those sections. These functions are performed in the Administrator client, which is discussed in ["Reviewing the Administrator Client"](#) on page 33.

TeamTrack Launch Page

Chris Tester | Launch Page | Help | Exit

Issue Management IT Help Desk

Submit into: Your Company Name : Issues : Software Development : Image Builder

Standard Fields

Issue Id: (Auto)

* Title:

Description:

* Issue Type: (None) Related Issue(s): Enter value to find here Find

User Fields

* Found in Version: (None) * Functional Area: (None)

How Found: (None) Manager: Joe Manager

Priority: (None)

Additional Notes:

Figure 2-3 . The Submit Form for the Image Builder Project

- 4 On the **Submit** form, type "PNG image contains black line" in the **Title** box.
- 5 In the **Description** box, type "When I exported a PNG image from Image Builder, the image contained a large black line down the middle."
- 6 Select **Bug Report** from the **Issue Type** drop-down list.
- 7 In the **User** section, select **v4.5** from the **Found in Version** drop-down list.
- 8 From the **Functional Area** drop-down list, select **User Interface**.
- 9 Provide additional information for fields on the **Submit** form as needed. When you are finished, click **OK**.

The newly submitted issue displays in the **Issue Details** frame, as shown in [Figure 2-4](#).

Image Builder Issue: BUG00106: PNG image contains black line

Update Actions: (select one)

State Change History

Submit New
11/8/2005 11:33:03 AM
by Chris Tester Owner: Joe Manager

Standard Fields

Issue Id: BUG00106

Title: PNG image contains black line

Description: 11/8/2005 11:33:03 AM - Chris Tester
When I exported a PNG image from Image Builder, the image contained a large black line down the middle.

Issue Type: Bug Report Related Issue(s): (None)

User Fields

Found in Version: v4.5	Functional Area: User Interface
How Found: (None)	Manager: Joe Manager
Priority: (None)	

Additional Notes:

Est. Time to Complete:	Planned Completion Date:
Required Completion Date: 3/31/2003	Engineer: Samir Engineer
Tester: Chris Tester	Time to Complete:
Resolution: (None)	Change In Version(s): (None)

Figure 2-4 . New Issue Submitted by Chris Tester

The State Change History indicates the item is residing in the "New" state, and that Joe Manager is the owner of the item. Chris's privileges enable him to view the issue and to update it as needed.

Options available in the Actions drop-down list enable Chris to add notes, URLs, and file attachments to the issues, as well as link it to another issue if needed.

In addition, Chris can subscribe to the "Issues I Submitted Change State" e-mail notification that informs him when the issue has been transitioned to a new state or when it is closed. Users can subscribe or unsubscribe to e-mail notifications in their user profile.

Joe Manager receives an e-mail notification indicating he has become the owner of an item. You can continue to follow this tutorial by logging in as Joe Manager and assigning this issue to an engineer, who will work on this task.



NOTE The Notification Server must be configured and running for users to receive e-mail notifications.

Tracking an Issue Through the Workflow

When an issue submitted in the workflow, it typically - but not always - has a new owner. You can follow the issue submitted by Chris Tester through its life cycle by exiting TeamTrack and logging on as Joe Manager.

Logging in to the Full Interface as Joe Manager

To log in to TeamTrack as Joe Manager:

- 1 Click the **Exit** button located on the toolbar.
- 2 Type **Joe** in the **User ID** box; do not provide a password.
- 3 Click **OK**.

TeamTrack launches to the Launch page, but as an upper-level manager, Joe prefers to use the full teamTrack interface.

To open the full interface, click the **Hide This Launch Page** link located in the **Things I Can Do** pane.

TeamTrack opens to Joe Manager's home page, as shown in [Figure 2-5](#).

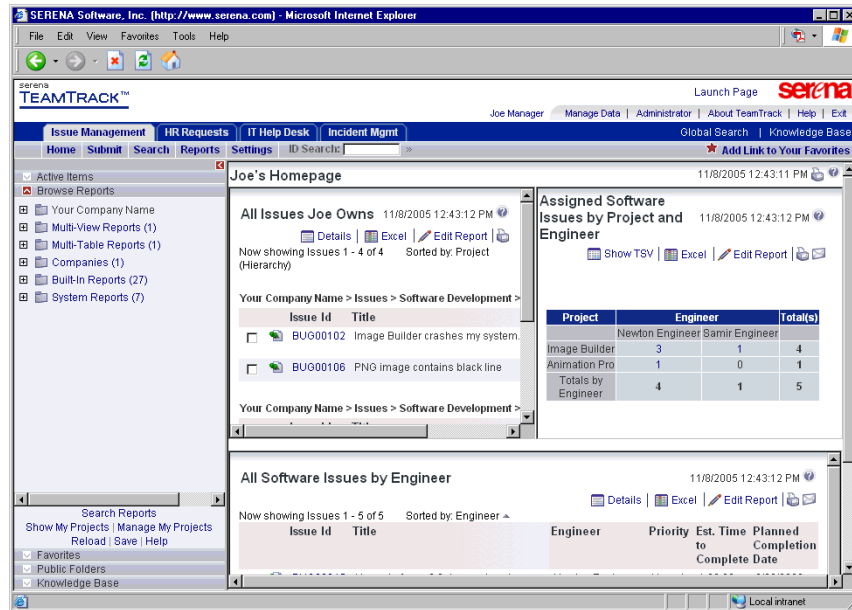


Figure 2-5 . Joe Manager's Home Page in the Full TeamTrack Interface

Joe's home page is a **Multi-View** report that contains three individual reports:

- **All Issues Joe Owns** – This **Listing** report that shows all issues Joe owns in all projects in the Issue Management solution. Only projects that contain issues owned by Joe are displayed in the report.
- **Assigned Software Issues by Project and Engineer** – This **Distribution** report shows the number of issues owned by each engineer in the Image Builder and Animation Pro projects, which use the Software Issues workflow. This report enables Joe to quickly determine the workload of each engineer.
- **All Software Issues by Engineer** – This **Listing** report is similar to the Assigned Software Issues by Project and Engineer report, except that it provides more detail about each issue. Joe can easily view the *Issue ID*, *Title*, *Engineer*, *Priority*, *Estimated Time to Fix*, and *Planned Completion Date* fields for each issue.

Joe can view details about each issue in any of the reports on his home page by clicking issue links throughout the report. The detailed information opens in a separate window.

Notice that the issue submitted by Chris Tester is listed in All Issues Joe Owns report. Click the item link to open the **Item Details** frame for the issue in the main browser window.

Understanding the Workflow Process

Based on the workflow definition for the Image Builder project, new issues are automatically assigned to Joe Manager. Other users can view and update data these issues based on their privileges; however, at this point in the workflow, Joe Manager is primarily responsible for assigning issues to specific engineers based on their expertise and workload.

This ownership is determined by the project an issue was submitted into, the type of request it is, and the state it resides in. For example, you may want to define your workflow so that new bug reports are automatically assigned to a software development manager and new documentation change requests are assigned to a technical writer. You can set default values for fields that determine ownership so that issues are automatically

assigned to the proper user; you can also enable users to manually select an owner, as this example demonstrates.

To view the process this issue will follow as it makes its way through the workflow, click the icon located next to **Actions** drop-down list at the top of the frame. A graphical view of the workflow used by the Image Builder project opens in a separate window, as shown in Figure 2-6.

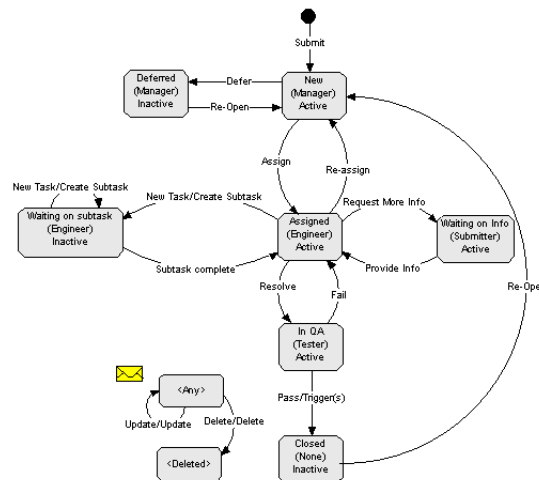


Figure 2-6 . The Software Issues Workflow

This process shows that Joe Manager can assign the change request to an engineer or defer the request. If the issue is assigned to an engineer, it can then be assigned to a tester after the task is complete. The tester then passes the request or fails it, automatically sending it back to the responsible engineer.

This sample workflow is designed to give you an understanding of how simple a TeamTrack process can be; however, you can create and customize your workflows to be as simple or complex as you need them to be. TeamTrack's flexibility enables you to create as many states and transitions needed, and to control the data entered at each stage in the workflow by creating an unlimited number of fields.

Assigning an Issue

To assign the issue submitted by Chris to an engineer:

- 1 If the issue you submitted as Chris is not already opened, click the **BUG00106** link on Joe's Home Page report. The issue opens in the **Item Details** frame.
- 2 Notice the buttons at the top of the issue. These are transition buttons. At this point in the workflow, Joe can assign the issue, defer it, update it, or delete it. Click the **Assign** button to open the transition form for BUG00106.
- 3 The *Engineer* and *Tester* fields are required for this transition, but the green, italicized labels indicate the fields already have values set by default in the Administrator client. This enables users to quickly and correctly provide information when they transition items.
- 4 Provide values for the following fields, which are required for this transition:
 - **Priority** - Select **Medium** from the drop-down list.

- **Est. Time to Complete** - Type the amount of time you estimate it will take an engineer to fix this bug. You can type an amount in the specified format (d hh:mm:ss) or type a number that will be converted to that format. For example, if you type 50, TeamTrack automatically converts this number to 2 days and 2 hours.
 - **Planned Completion Date** - Click the **Calendar** icon next to this field to open a calendar and select a planned completion date.
- 5 Provide values or data for other fields as needed, and then click **OK**.
 - 6 Refresh Joe's home page by clicking the **Home** button on the TeamTrack toolbar. Notice that the change request is no longer on his page because it has a new owner. The issue is now owned by Samir Engineer and is visible on his home page.

Working on the Issue as an Engineer

To view the issue on Samir's home page:

- 1 Click the **Exit** button located on the toolbar.
- 2 In the **User ID** box, type **Samir**; do not provide a password.
- 3 Click **OK**. TeamTrack opens to the **Launch** page.
- 4 Click the **View All Items I Own** link located in the **Things I Can Do** pane. Notice the issue submitted by Chris is listed in the Image Builder project, as shown in [Figure 2-7](#).

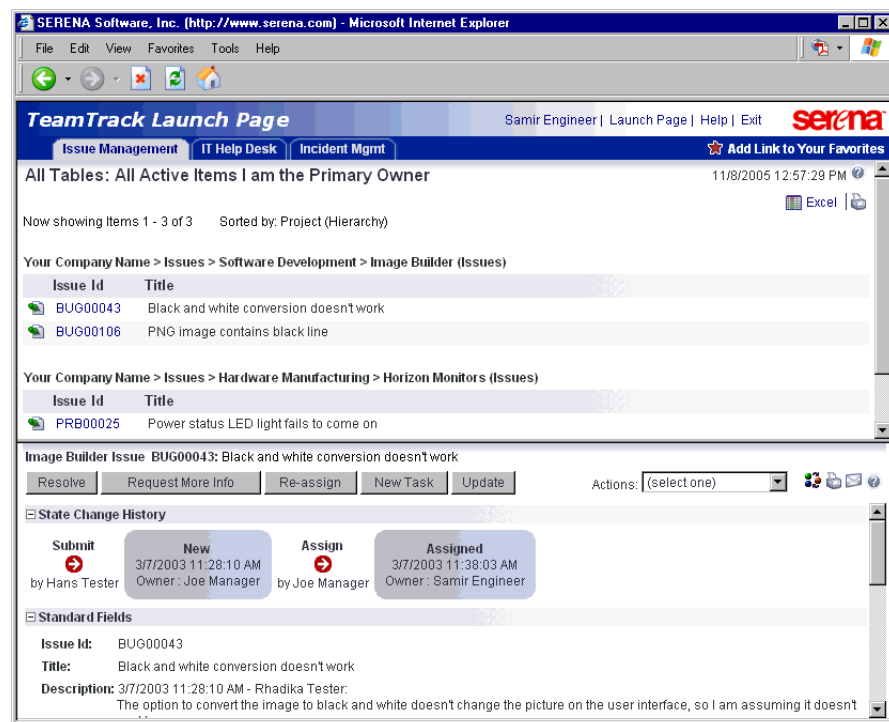


Figure 2-7 . The New Issue Owned by Samir Engineer

- 5 In the **Item List** frame, click the **CHG00106** link. The issue opens in the **Item Details** frame.

Notice that Samir has a different set of transition buttons than Joe Manager. The transition buttons available to a user depend on the state an issue is in as well as the privileges

granted to the user. For example, Joe Manager has privileges to delete issues, so the **Delete** button is available to him. Samir does not have privileges to delete issues, so the **Delete** button is not available to him.

While working on this issue, Samir can send e-mail to other TeamTrack users, add notes, file attachments, or URLs to the issue, or link the issue to another issue.

To add an attachment to an issue:

- 1 From the **Actions** drop-down list, select **Add File**. The **Add File Attachment** dialog opens, as shown in [Figure 2-8](#).

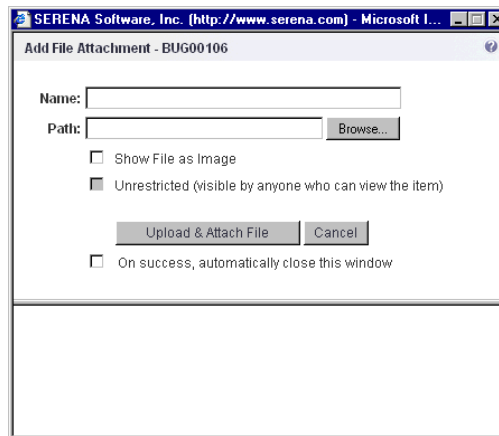


Figure 2-8 . Adding a File Attachment to an Issue

- 2 In the **Name** box, type **Sample GIF**.
- 3 Click **Browse** to locate a file on your computer that you can attach to this issue.
- 4 Click **Upload & Attach File** to attach the file to the issue.
- 5 Scroll to the bottom of the issue to view the file attachment in **Attachments** section of the issue.

After Samir completes the task related to the issue, he can resolve the issue and send it to a tester for verification.

To resolve the issue:

- 1 Click the **Resolve** button at the top of the issue.
- 2 The *Resolution* and *Change in Version* fields are required for this transition, meaning that Samir must provide values for them. From the **Resolution** drop-down list, select **Code Change**. From the **Change in Version** drop-down list, select **v4.5**.
- 3 Click **OK**.
- 4 Click the **Launch Page** link to return to the **Launch** page.
- 5 Click the **View All Items I Own** link. Notice that the change request is no longer on his page because the issue is now owned by Chris Tester.

Working on the Issue as a Tester

To view the issue on Chris's home page:

- 1 Click the **Exit** button located on the toolbar.

- 2 In the **User ID** box, type **Chris**; do not provide a password.
- 3 Click **OK**. TeamTrack opens to the **Launch** page.
- 4 Click the **View All Items I Own** link located in the **Things I Can Do** pane. The issue resolved by Samir is listed in the **Item List** frame.

After he completes his testing, Chris can pass the issue if his testing verifies a correct change. If testing uncovers problems with the issue, Chris can fail the issue to send it back to Samir for further work.

To pass an issue:

- 1 In the **Item List** frame, click the **CHG00106** link. The issue opens in the **Item Details** frame.
- 2 Click the **Pass** button.
- 3 Click **OK**. Because the Pass transition is set as a "quick" transition in the Administrator client, a **Transition** form does not open. This enables Chris to complete the transition on the issue with a single click. If Chris needs to add more information to the issue, he can click the **Update** button to open the **Update** form.

Review the issue Chris has verified. The State Change History enables you to easily determine who worked and when the issue moved from state to state. This provides a tracking process that can be referred to as needed.

Finding Information in TeamTrack

Users can use TeamTrack's search and reporting features to search for data in the system. search for data in several ways, including TeamTrack's Search and reporting features.

Using Search Features

TeamTrack provides several Search options:

- **ID Search** - This option enables users to search for primary items in the selected solution by Item ID. Users can type the entire Item ID, including prefix, or only the numeric ID. All projects in the selected solution are searched, and all active and inactive primary items that meet the search criteria are returned.
- **Basic Search** - This feature enables users to perform searches for primary items for the selected solution. Users can enter basic search criteria, such as keywords, project, and submitter, and then perform the search.
- **Advanced Search** - This feature enables users to perform searches for primary and auxiliary items, archived primary items, and notes and attachments in Primary and Auxiliary tables, depending on their privileges. You can use the Administrator client to specify which fields can be searched on the **Advanced Search** form.
- **Advanced Lookup Tool** - This feature enables users to search for primary or auxiliary items that you can manage and as their privileges allow. You can use the Administrator client to specify which fields are available in the **Lookup** form for entering search criteria.

- **Global Search** - The Global Search feature enables users to search for items multiple Primary and Auxiliary tables at once. If they have appropriate privileges, they can save their search specifications as a **Multi-Table** report.

Each of these search features are explained in more detail in the *Serena TeamTrack User's Guide* or the TeamTrack browser online help. The following instructions explain how to use the Basic Search feature.

Using the Search Feature

To use the Search feature:

- 1 Log in to TeamTrack as Joe Manager.
- 2 Click the **Search** button located on the **Solution** toolbar. The **Basic Search** page opens, as shown in the following figure.

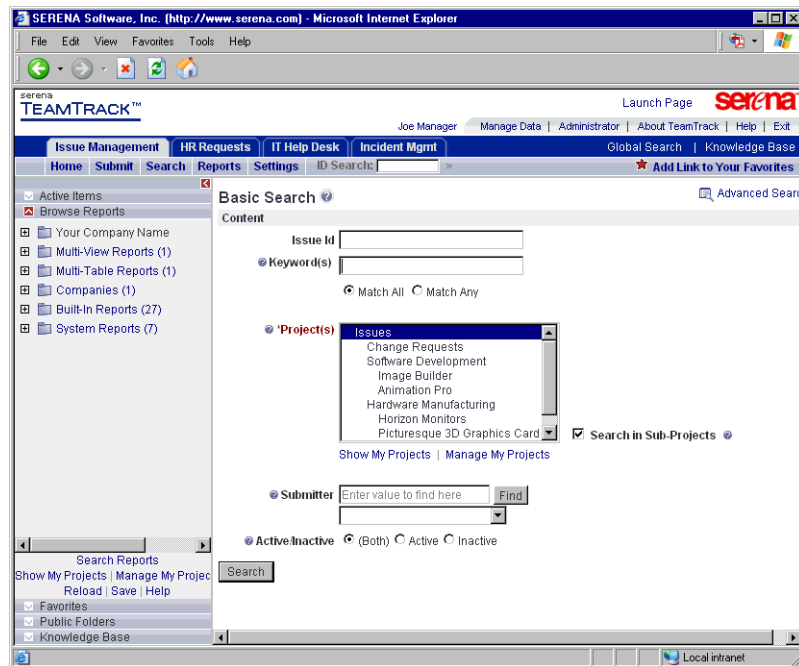


Figure 2-9 . The Basic Search Page

- 3 In the **Keyword(s)** box, type **black line**.
- 4 From the **Project(s)** list, select **Image Builder**.
- 5 Select the **Inactive** option.
- 6 Click **Search**.

The issue you just tracked through the workflow is returned.

Using Reports

TeamTrack's real-time reporting capabilities enable you to analyze and monitor your system as data changes. You can create reports of varying types – such as **Listing**, **Distribution**, **Trend**, and **State Change** reports – that query the database using basic conditions or advanced SQL statements. Data can be filtered by project, and access to

reports can be controlled by specifying one of four privilege categories: Guest, Manager, Private, or User.

Reports are organized by solution and by Auxiliary table. For example, if you are working within the Issue Management solution in the Sample database, you can access reports that pertain to primary items within the solution, as well as reports that pertain to Auxiliary tables in which you have privileges to access reports.

The Sample database contains a selection of built-in reports, as well as a selection of sample reports that demonstrate TeamTrack's robust reporting capability. You can also experiment with TeamTrack's reporting capabilities by creating your own reports.

Searching for Reports

You can use the **Reports** page to search for existing reports by report title, author, or both. You can also browse for reports in the **Folders View**.

To view reports authored by Joe:

- 1 Log in to TeamTrack as Joe Manager.
- 2 Click the **Reports** button on the **Solution** toolbar. The **Reports** page opens in the main browser window and the **Browse Reports** list opens in the **Folders View**.
- 3 In the **Find a Report** area, type **Project Status** in the **Search by Title** box.
- 4 In the **Search by Author** box, type **Joe**, and then click **Find**.
- 5 Click **Search**. Several reports are returned. Click the link for the **Project Status by State** report, which opens in the main browser window, as shown in [Figure 2-10](#).

The screenshot shows the TeamTrack web application interface. The main content area displays the 'Project Status by State' report. The report is a table with the following data:

State	Project				Total(s)
	Image Builder	Animation Pro	Horizon Monitors	Picturesque 3D Graphics Card	
Assigned	4	1	2	0	7
Fixed	0	0	0	1	1
In QA	0	1	0	0	1
New	1	2	1	1	5
Root Cause Analysis	0	0	1	1	2
Totals by Project	5	4	4	3	16

Figure 2-10 . The Project Status by State Report Authored by Joe

The **Project Status by State** report in the Sample database is a tabular-style report that shows how many issues are in each state in each project. The report contains a threshold that changes a row to a specified color when more than two issues reside in any state. You can click numbers that display as links to view the issues they represent. For example, the

report shows that the Image Builder project contains four issues in the Assigned state, which is higher than the specified threshold. Click the number **4** to view those issues in a new window.

Browsing for Reports

Browsing for reports enables you to view all reports that you have privileges to run, edit, and delete. Reports are organized by solutions and projects, and in some cases, by report type.

To browse for reports:

- 1** Log in to TeamTrack as Joe Manager.
- 2** Click the **Reports** button on the **Solution** toolbar. The **Reports** page opens in the main browser window and the **Browse Reports** list opens in the **Folders View**.
- 3** Reports are organized in folders in the **Browse Reports** area. Expand the folders by clicking the plus (+) sign.
- 4** Run individual reports by clicking the report link. Report data is returned in the main browser window.

Creating Reports

These instructions provide basic guidelines on creating reports. In-depth reporting instructions can be found in TeamTrack's browser online help or in the *Serena TeamTrack User's Guide*.

To create a report:

- 1** In the browser interface logged in as Joe Manager, click the **Reports** button on the **Solution** toolbar. The **Reports** page opens in the main browser window.
- 2** From the **Report Type** drop-down list in the **Create a Report** area, select **Distribution**, and then click **Next**. The **Create Distribution Report** form opens.
- 3** From the **Report Style** drop-down list, select **Pie Chart**.
- 4** From the **Row** drop-down list, select **Owner**.
- 5** In the **Search Filter** area, click **Add**.
- 6** Select **Active/Inactive** from the **Fields** drop-down list, **=** from the **Operators** drop-down list, and **Active** from the **Field Values** list.
- 7** Click **OK**.
- 8** Click **Preview** to view the report before saving it. To modify the report, click **Back**.
- 9** To save the report, click **Save**. The **Save As** form opens.
- 10** In the Title box, type **Workload Chart**.
- 11** From the **Privilege Category** list, select an access level for the report. For this example, select **Manager**.
- 12** Click **Finish**.

13 A page opens, confirming the report's successful creation. Click **Run Report**. The following figure shows the Workload Chart report.

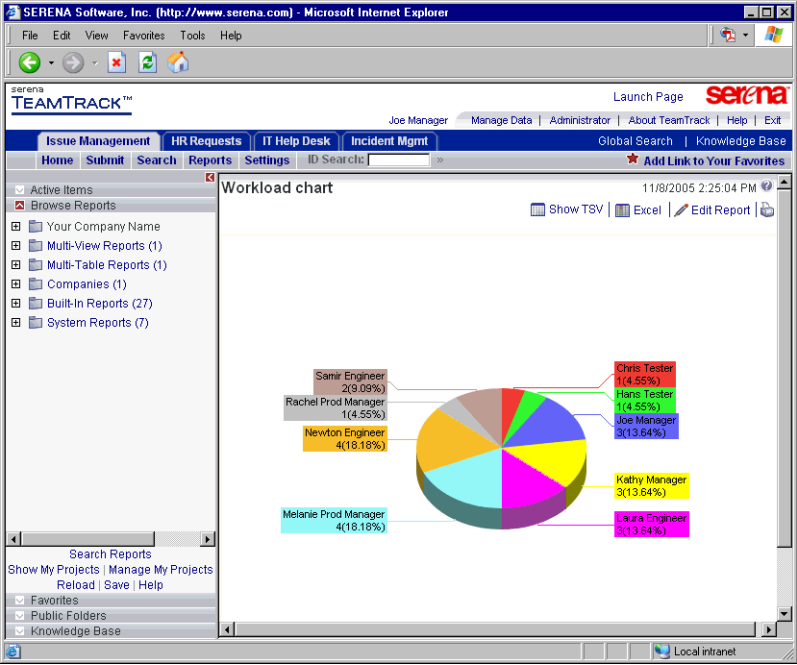


Figure 2-11 . The Workload Chart Report

Chapter 3

Reviewing the Administrator Client

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Introduction to the Administrator Client

The Administrator client resides on a server or workstation in your organization's network and allows one or multiple individuals to customize and maintain your tracking system. TeamTrack's architecture enables you to perform most administrative tasks without logging users out of the system.

A few of the capabilities provided through the Administrator client are:

- Setting up server connectivity
- Creating a database and solutions
- Defining the workflow process
- Defining your project hierarchy
- Customizing fields
- Creating Primary and Auxiliary tables
- Defining groups of users
- Assigning user and group privileges
- Managing multiple administrators
- Managing e-mail notifications
- Enabling e-mail submission of issues
- Enabling self-registration of external users

Launching the Administrator Client

Choose one of the following methods to launch the Administrator client:

- Double-click the **TeamTrack Administrator** program shortcut located in the Serena program group.
- From the **Start** menu, select **Programs**, select **Serena**, select **TeamTrack**, and then select **TeamTrack Administrator**.

The Administrator client launches to the **Projects** tab, as shown in [Figure 3-1](#).

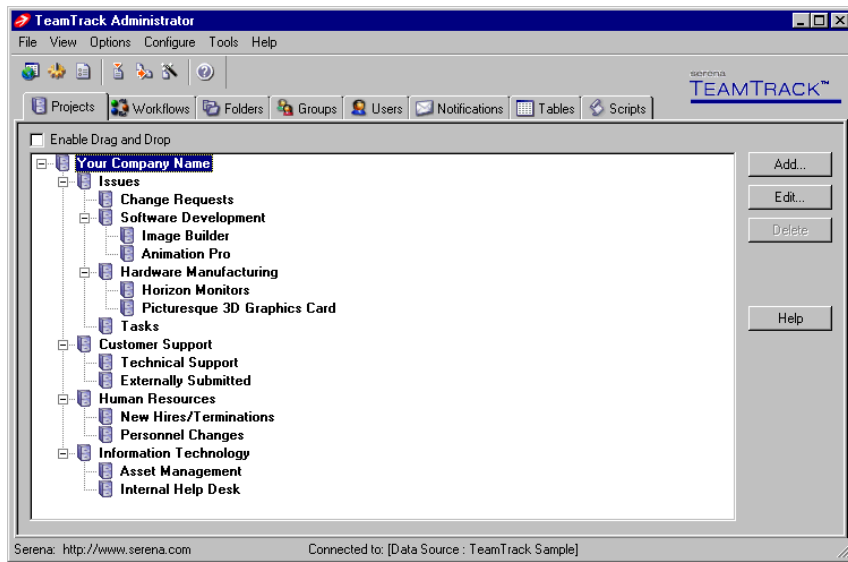


Figure 3-1 . The Administrator Client and the Project Tab

Projects contain items submitted by users. Each project is assigned to a workflow, which is a collection of fields, states, and transitions that defines the tracking process of these items. States and transitions map the path that items follow; fields contain the data that gets captured along the way. This two-fold system enables you to first define workflow processes, then use projects to track items at various levels. Several projects may use the same workflow, or workflows may be modified as needed for individual projects.

Customizing Your Tracking Process

The following instructions explain how to customize the workflow so that Joe Manager can send a newly submitted issue back to the user who submitted it and request more information. You can do this by adding a state and a transition to your workflow and making a field required during the transition.

To customize the Software Issues workflow:

- 1 Select the **Workflows** tab, and then select the **Software Issues** workflow.
- 2 Click **Edit**. The Software Issues workflow opens in the **Graphical Workflow Editor**, as shown in [Figure 3-2](#).

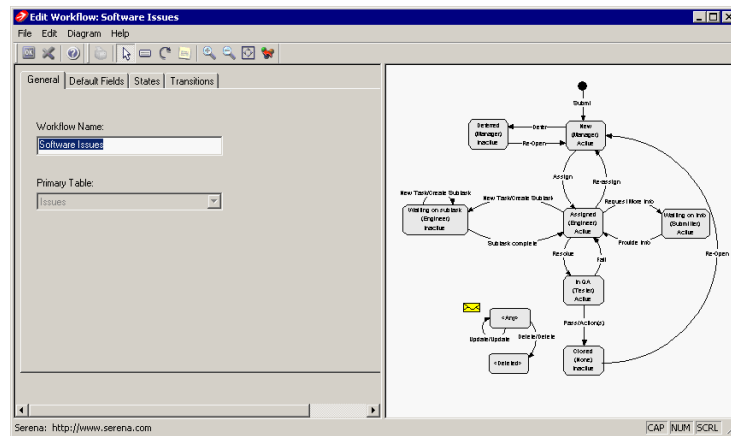


Figure 3-2 . The Software Issues Workflow in the Graphical Workflow Editor

- 3 Right-click in the **Graphical Workflow Editor** (right pane), and then select **State**. Click inside the right pane to open the **Add State** dialog.
- 4 In the **State Name** box, type **Info Required**.
- 5 From the **Owner** drop-down list, select **Submitter**.
- 6 Click **OK** to save the state.
- 7 Right-click in the **Graphical Workflow Editor** (right pane), and then select **Transition**. Click inside the **New** state and drag your mouse to the **Info Required** state to open the **Add Transition** dialog.
- 8 In the **Transition Name** box, type **Need More Info**.
- 9 Select the **Fields** tab, and then select the **Override Inherited Field Order** check box.
- 10 Select the *Additional Notes* field, and then drag it from the *User* section to the *Standard Field* section.
- 11 With the *Additional Notes* field selected, click **Edit** to open the **Edit Field Properties** dialog.
- 12 Select the **Attributes** tab, and then select the **Allow Override** check box.
- 13 Select the **Required** check box, and then click **OK** to exit the **Edit Field Properties** dialog. Click **OK** to exit the **Add Transition** dialog, and then click **OK** on the Graphical Workflow Editor to save your changes to the Software Issues workflow.

You can now view the changes you made to the Administrator client in the browser interface.

To view the changes:

- 1 Launch TeamTrack in a browser and log on to the system as Joe Manager.
- 2 Type **BUG00032** into the ID Search box, and then press **Return**.
- 3 Select the Item link to open the issue.

- 4 Notice the button in this frame labeled **Need More Info**. This is the transition you created in the Administrator client. Click the **Need More Info** button to open the **Transition** form.
- 5 The *Additional Notes* field is located in the Standard Fields section and is set as required, forcing users to provide a value for this field before they can complete the transition on this item.

For full details on customizing your tracking process and other administrative functions, refer to the *Serena TeamTrack Administrator's Guide*, which is installed in the *Serena/TeamTrack/Manuals* directory.

