

User Guide

Version 3.0

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1. WHAT IS TrackMyBugs?

TrackMyBugs is a web-based application that provides a method for workgroups to manage issues and feature requests for website or software development. Typical users include software developers, designers, website owners, testing teams, IT personnel, and end-users.

2. TrackMyBugs FEATURES

- Affordable, simple subscription model
- The Issue page contains all working information about an individual issue, including complete history
- Allows reopening of closed issues or deletion of issues
- Flexible search criteria with priority coloring of the issue search response list
- Summary page displays last 10 open and last 10 closed issues
- Queries can be saved for quick access to an issue list
- Selectable e-mail notifications for new issues, new comments, or new attachments
- Flexible group assignments
- Issues are assigned to a specific project
- The workgroup manager can tailor terminology to the team's environment
- User access is logged
- Data is backed up twice daily

3. ISSUE REPORTING AND DISPLAY

3a. Concepts – Workgroups, Users, Groups and Projects

A **workgroup** is defined as a functional team. The **workgroup manager** does the day-to-day operation of the site, including managing projects, groups, and users. A **group** is a set of users wishing to participate in a project. A **user** can be assigned to one or more groups. A user with workgroup manager or admin privileges can add, edit and view issues entered by users in their workgroup. In this manner, one developer can be assigned to multiple groups for various ongoing projects for different customers.

Working scenario: “Demo Weasel Site” – For our example, the workgroup will be a web development team of eight people that has several customers. One of their customers wants to create a website about weasels, called the “Demo Weasel Site.” The team is charged with developing this site, creating it from scratch and handling ongoing maintenance. The customer wants to participate in the development. Customer employees include a content manager and the marketing manager.

To get started, the workgroup manager creates a project for the site, calling it the “Demo Weasel Project,” then creates a group for team members needing to participate in development, calling it the “Demo Weasel Group.” Users are then added to the group. The workgroup manager adds three of the team's developers to the site as users, as the others are occupied with other projects. She then adds the customer's content manager and marketing manager as users. Each of the users is assigned to the Demo Weasel Group. The workgroup manager then assigns the Demo Weasel Group to the project. The development team already has a group of testers in place, so they assign this group to the project, too. New users receive an e-mail with their login information.

When an issue is reported, all members of the group receive notification of the issue. When an issue is created and assigned to the project, it lives with that project for the life of the issue. If the issue can't be resolved or is deferred, the version can be changed to assign it to a future version.

Each team member receives notifications, and they can participate by modifying any item in the issue, adding comments, or uploading screenshots. A full history of all activity relating to the issue is saved and displayed at the bottom of the issue page. If they decide they don't want to participate or receive notifications, the workgroup manager can change their notify preferences so they do not receive e-mail, or delete them as a user.

Every user who is a user type of “developer” will receive an e-mail if the issue is assigned to them.

3b. Concepts – Privileges

The two privilege levels in TrackMyBugs are workgroup manager and admin. Privileges are inherent in the system, there is no way to change them. Here is a display of who can perform which functions:

Function	WGManager	Admin
Manage Projects	X	
Manage Groups	X	
Manage Users	X	
Assign Users to Groups	X	
View Logs	X	
View Issues Assigned to Them	X	X
Enter Bugs and Feature Requests	X	X
Upload Screenshots	X	X
Receive E-mail Notifications	X	X

A user with **admin** privileges is the typical user, and has all the issue tracking functionality available, including adding and deleting issues, commenting on issues, and adding attachments. A user is assigned an admin privilege through the users add/edit functionality, available only to the workgroup manager.

A user with **workgroup manager** privileges is usually the day-to-day manager of the site. Workgroup managers are allowed to manage groups and projects, manage users, assign users to groups, and have full access privileges to add, edit, and delete issues.

Visitors are unprivileged, and are not allowed access to the application.

3c. Concepts – Issue Tracking

New issues can be reported by any user. The issue is assigned to a project by the user creating the issue. Only those projects to which the logged-in user has been assigned by the workgroup manager will be selectable.

When searching, only those projects to which the user has been assigned will be available in the search forms.

An issue belongs to a project, but not a version. This was a conscious design choice to allow flexibility. By working in this manner, the issue may be moved to a different version with ease.

The **history panel** at the bottom of the issue page displays a complete history of activity for the issue since its inception, including who made a change and what the change previously was.



History	
2006-08-18	New Issue.
2006-08-22	Comment by Head Weasel Haha, no chance.
	Assigned to Head Weasel by Head Weasel (Was: Nobody)

3d. E-Mail Notifications

When a new issue is submit, an e-mail is generated to all members of the groups assigned to that project. An e-mail will be sent to users if their notify preference is turned on (in the Users area). If notify is on, e-mails will also be received for new comments or attachments.

4. WORKGROUP MANAGER FUNCTIONALITY

The **workgroup manager** does the day-to-day operation of the site, including managing projects, groups, and users. Workgroup managers can enter, modify or delete issues, and can modify the setup of all categories (including versions, statuses, etc.). The workgroup manager cannot make changes to system settings, which are accessible only by the superadmin. Upon login, a privilege of “WGManager” will be indicated below the user’s name if they are a workgroup manager.

The workgroup manager can change nearly all system settings, accessible via the left navpanel:

- Statuses (e.g. Closed, Reopened)
- Resolutions (e.g. Fixed, Not a Bug)
- Severities (e.g. Critical, Feature Request)
- Operating Systems (e.g. Windows XP, Mac OS X)
- Browsers (e.g. Firefox, Internet Explorer)
- Versions (e.g. Beta, Inhouse)

4a. User Management

To create a user, click “Add” below the Users link in the Admin area of the navbar. Fill in the required information, making sure the Login ID and password are unique, then click “Add” . If anything is wrong with your submission, you will get an error explaining what needs to be changed. An e-mail is generated to the new user with their login information.

Returning to the user record, you will now see a Group Assignments panel below the User Record information. Click on a group to select that group to be assigned to the user. If you want to assign another group, select it with option-click. **IMPORTANT:** Each time you click “Assign” , the old group assignments are wiped out and the new ones take effect. **A new user has no groups assigned by default.**

The workgroup manager can turn on or off e-mail notification for a user. The user will receive e-mails for issues, comments, and attachments for a project if a group to which the user belongs has been assigned to the project.

4b. Project Management

Only users with workgroup manager privileges can manage projects. To create a project, click “Add” below the Projects link in the Admin area of the navbar. Give the project a unique name, change the status, add an optional description and comment, then click “Add” .

Returning to the project record, you will now see a Group Assignments panel below the Project Record information. Click on a group to select that group to be assigned to the project. If you want to assign more groups, option-click on each one. **IMPORTANT:** Each time you click “Assign” , the old group assignments are wiped out and the new ones take effect. **A new project has no groups assigned by default.**

The screenshot shows the TrackMyBugs web application interface. The browser address bar displays the URL: http://www.trackmybugs.com/admin/setup_editrecord.lasso?Datatype=Project&ID=L3RS2eJc. The page title is "Workgroup issue tracking" and the logo "track.my.bugs" is visible. The user is identified as "Head Weasel WGManager".

The main content area is divided into several sections:

- User:** Head Weasel, WGManager. Includes links for Issues, My Assignments, Communication, My Profile, and Log Out.
- Admin:** Projects, Users, Groups. Each has "Add", "Edit", and "Delete" options.
- Setup:** Statuses, Resolutions, Severities, Operating Systems, Browsers, Versions. Each has "Add", "Edit", and "Delete" options.
- Links:** TrackMyBugs Home, Take the Tour, Support Request.

The **Project Record** section includes a "NOTE: ♦ Indicates required information." and the following fields:

- Project Name:** Internal Website Project
- Description:** Weasel internal site
- Project Status:** On Hold
- Comments:** planning stages of the internal site structure

An "Update" button is located below the Project Record form.

The **Group Assignments** section shows a dropdown menu with the following options:

- Demo Weasel Group
- Weasel Group** (highlighted with a red circle)
- Weasel Internal Website

An "Assign" button is located below the Group Assignments dropdown.

The **Existing Projects** section lists the following projects:

- [Blog](#) The blog of Joe Blogs
- [Headquarters Expansion](#) A test project for weasels
- [Headquarters Expansion](#)
- [Internal Website Project](#) Weasel Internal site

The footer of the page contains the text: "TrackMyBugs is copyright ©2008 iterate [Terms of Use](#) [Privacy](#)".

4c. Group Management

Only users with workgroup manager privileges can manage groups. To create a group, click "Add" below the Groups link in the Admin area of the navbar. Give the project a unique name, add an optional comment, then click "Add".

Users are added to groups via that user's record. When viewing the Group record, the users assigned to that group are displayed under the head "Members of This Group" (see below).

The screenshot shows a web browser window titled "TrackMyBugs" with the URL http://www.trackmybugs.com/admin/setup_editrecord.lasso?DataType=Group&GroupID=28. The browser's toolbar includes buttons for "Disable", "Cookies", "CSS", "Forms", "Images", "Information", "Miscellaneous", "Outline", "Resize", and "Tools".

The page header features the "track my bugs" logo, the text "Workgroup issue tracking", and the "iterate" logo.

User
Head Weasel
WGManager

- Issues**
Add | Search
Issue Summary
- My Assignments**
All Issues
All Open Issues
- Communication**
- My Profile**
- Log Out**

Admin

- Projects**
Add | Edit | Delete
- Users**
Add | Edit | Delete
- Groups**
Add | Edit | Delete

Setup

- Statuses**
Add | Edit | Delete
- Resolutions**
Add | Edit | Delete
- Severities**
Add | Edit | Delete
- Operating Systems**
Add | Edit | Delete
- Browsers**
Add | Edit | Delete
- Versions**
Add | Edit | Delete

Links
[TrackMyBugs Home](#)
[Take the Tour](#)
[Support Request](#)

Group Record

NOTE: ♦ Indicates required information.

Group Name ♦ Weasel Group

Comments

Members of This Group

- [Frog, Beauregard](#)
- [Otter, Apprentice](#)
- [Weasel, Head](#)

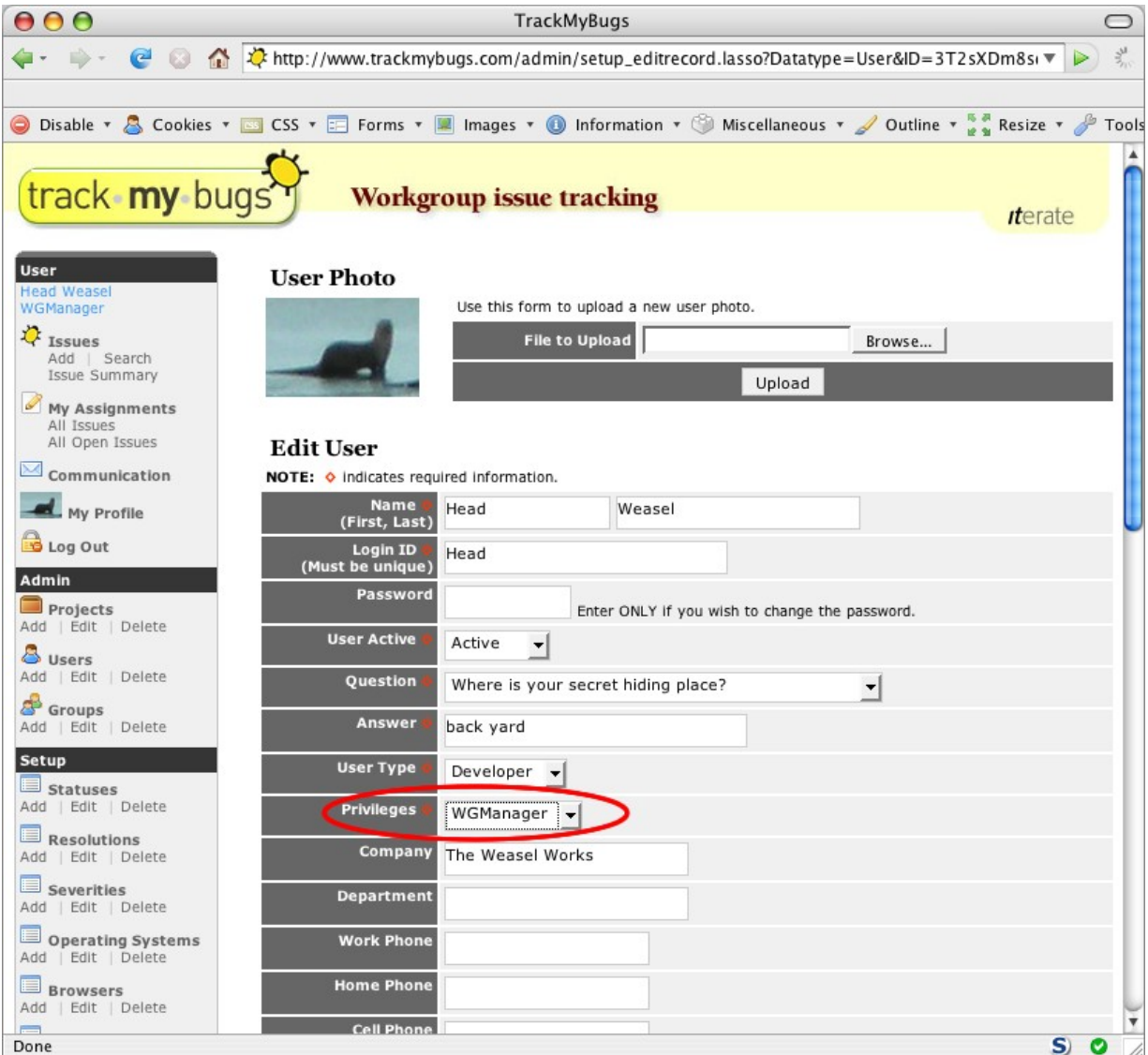
TrackMyBugs is copyright ©2008 **iterate** [Terms of Use](#) [Privacy](#)

Done

5. ADMIN FUNCTIONALITY

A user with **admin** privileges is the typical user, and can access all the issue tracking functionality, including adding and deleting issues, commenting issues, and adding attachments. A user is assigned an admin privilege through the users add/edit functionality, available only to the workgroup manager.

In our example for the Demo Weasel Site, all users except the workgroup manager are admins (i.e. Have their privileges set to "Admin").



6. HOW TO SET UP A PROJECT FOR TRACKING

- a. Set up the user (Users->Add).
- b. Set up the group (Group->Add).
- c. Assign the user to the group. (User record, at bottom). An example of the user after group assignments are made is below.

The screenshot shows the 'Edit User' form in the TrackMyBugs application. The user being edited is 'Head Weasel' (WGManager). The form includes fields for Name, Login ID, Password, User Active status, Question, Answer, User Type, Privileges, Company, Department, Work Phone, Home Phone, Cell Phone, Fax, E-mail, Chat, Website, Address, City, State, Zip, Country, and Comments. The 'Group Assignments' section at the bottom is circled in red, showing the following groups assigned to the user:

- Demo Weasel Group
- Weasel Group
- Weasel Internal Website

The 'Last Access' is recorded as 2008-08-11. An 'Update' button is visible at the bottom of the form.

d. Set up the project (Project->Add). To create a project, click “Add” below the Projects link in the Admin area of the navbar. Give the project a unique name, change the status, then click “Add” .

e. Assign the group to the project. (Project Record, bottom panel). After the project has been added, revisit the project record. The Group Assignment panel will now appear below the project record. Click the appropriate group, then click “Assign”.

If you want to assign more groups, option-click on each one. **IMPORTANT:** Each time you assign a group, you must select all of the groups that you wish to be assigned to the project.

The project is now ready to accept issue reports. An example project with a group assignment for the group “Weasel Group” appears below. Assigned groups are highlighted in the browser.

The screenshot displays the TrackMyBugs web application interface. The browser window title is "TrackMyBugs" and the URL is "http://www.trackmybugs.com/admin/setup_editrecord.lasso?Datatype=Project&ID=L3RS2ej:". The page features a yellow header with the "track my bugs" logo, the text "Workgroup issue tracking", and the "iterate" logo.

The main content area is divided into several sections:

- User:** Includes links for "Head Weasel" and "WGManager", and sections for "Issues", "My Assignments", "Communication", and "My Profile".
- Admin:** Contains sections for "Projects", "Users", and "Groups", each with "Add", "Edit", and "Delete" options.
- Setup:** Includes sections for "Statuses", "Resolutions", "Severities", "Operating Systems", "Browsers", and "Versions", each with "Add", "Edit", and "Delete" options.
- Links:** Provides links to "TrackMyBugs Home", "Take the Tour", and "Support Request".

The **Project Record** section is the primary focus, showing a form with the following fields:

- Project Name:** Internal Website Project
- Description:** Weasel internal site
- Project Status:** On Hold
- Comments:** planning stages of the internal site structure

An "Update" button is located below the form. Below the Project Record is the **Group Assignments** section, which contains a list of groups:

- Demo Weasel Group
- Weasel Group** (highlighted in yellow and circled in red)
- Weasel Internal Website

An "Assign" button is located below the group list. At the bottom of the page, there is an **Existing Projects** section listing:

- [Blog](#) The blog of Joe Blogs
- [Headquarters Expansion](#) A test project for weasels
- [Headquarters Expansion](#)
- [Internal Website Project](#) Weasel internal site

The footer of the page states "TrackMyBugs is copyright ©2008 iterate" and includes links for "Terms of Use" and "Privacy". The browser status bar at the bottom shows "Done" and security icons.

7. ISSUE REPORTING

Once the users, project, and group are set up, issue reporting is easy and straightforward. Click “Add” under the Issues item on the navpanel. Make all of the required selections, then click “Add” . Your new issue should show up under the project when you search. All information relating to a specific issue will show up on this one page. E-mails will be generated to any workgroup member with their Notify preference set to yes.

After the issue has been submit, you can come back and make comments or add attachments. When any change is made to the issue, that change will appear in the History area at the bottom of the page.

Attachments that have been added will show below the Attachments panel as a thumbnail. Clicking the thumbnail will open the attachment in a new browser window. Here is an example of a completed issue record:

The screenshot shows the TrackMyBugs web application interface. At the top, there's a navigation bar with the logo and the text "Workgroup issue tracking". Below this is a sidebar menu with categories like User, Issues, My Assignments, Communication, My Profile, Log Out, Admin, Projects, Users, Groups, Setup, and Links. The main content area displays the details for "Issue # 212 - View User Passwords". A green banner at the top of the issue details says "Attachments Deletion Successful" with the message "The requested file attachments were successfully deleted." Below this is a form with various fields: Date (2006-08-18), Reported By (Head Weasel), Project (dropdown), Version (Live Site), To be Closed in Version (dropdown), Closed in Version (dropdown), Title (View User Passwords), Description (I would like to be able to see user passwords in the Edit User Page.), Assigned to (Head Weasel), URL (http://lbt.landmanninteractive.com/), Severity (Feature Request), Priority (5 - High), Status (New), Resolution (dropdown), Browser (Not Relevant), and Operating System (All). There are "Update" and "Delete" buttons. Below the form is a "Comment" section with a text area and an "Add Comment" button. The "Attachments" section shows three files: "TangoIcons_At.w.png" (uploaded 2008-06-13), "OpenOfficeText_wYd.odt" (uploaded 2008-06-13), and "somejunkcode_s6C.pdf" (uploaded 2008-06-13). A red arrow points from the text "Uploaded Attachments" to these files. At the bottom is a "History" panel with a red arrow pointing from the text "History Panel" to it. The history entries include: "2006-08-18 New Issue.", "2006-08-22 Comment by Head Weasel: Waba, no chance.", "Assigned to Head Weasel by Head Weasel (Was: Nobody)", "2007-05-03 Comment by Head Weasel: No Comment", "Attachment deleted by Head Weasel", "2007-12-05 Priority changed to 5 - High by Head Weasel (Was: 1 - Low)", "2008-05-09 Attachment 'somejunkcode_s6C.pdf' uploaded by Head Weasel", and "2008-06-13 Attachment deleted by Head Weasel".

8. ATTACHMENTS

Documents or images can be attached to an Issue using the form in the Attachments panel, and will display a preview (for image files) or a generic icon (for document filetypes). These can be downloaded by any user by clicking the icon.

Filetypes that can be uploaded are:

Document Filetypes

- Adobe Acrobat (.pdf)
- Adobe Flash (.swf)
- Adobe InDesign (.indd)
- GZIP Compression (.gz)
- Microsoft Word (.doc)
- Microsoft Excel (.xls)
- Microsoft PowerPoint (.pps, .ppt)
- Omni Graffle (.graffle)
- OpenDoc Presentation (.odp)
- OpenDoc Spreadsheet (.ods)
- OpenDoc Text (.odt)
- Stuffit (.sit, .sitx)
- Text (.txt)
- ZIP Compression (.zip)

Image Filetypes

- JPEG Images (.jpg, .jpeg)
- GIF Images (.gif)
- TIFF Images (.tif, .tiff)
- PNG Images (.png)
- Photoshop Images (.psd)

NOTE: Files will be renamed with a 3-digit modification to the filename to assure uniqueness.

9. ISSUE SUMMARY

Clicking Issues in the navpanel will show the Issue Summary information. This includes the 10 most recently-submitted issues, and the 10 most recently-closed issues. Only those projects for which the currently logged-in user has been assigned will appear.

This page also indicates who initially opened the issue and the date it was first opened.

9a. Saved Queries

Also shown are Saved Queries, which is a short-cut method of searching. The queries shown are the currently logged-in user's queries.

10. TECH SUPPORT and VENDOR INFO

Support requests can be entered on the Support Request page: <http://www.trackmybugs.com/support> or by calling (608) 235-4714 (Central Time).

Vendor Info:

- Iterate, LLC
- 2602 Dunwoody Dr., Madison, WI 53713 USA
- Phone (608) 235-4714 (Central Time)
- Fax (607) 299-1558
- support@trackmybugs.com

11. COPYRIGHT

TackMyBugs is copyright ©2008, Iterate, LLC. All rights reserved. Portions of the application rely on open-source software and commercial software.