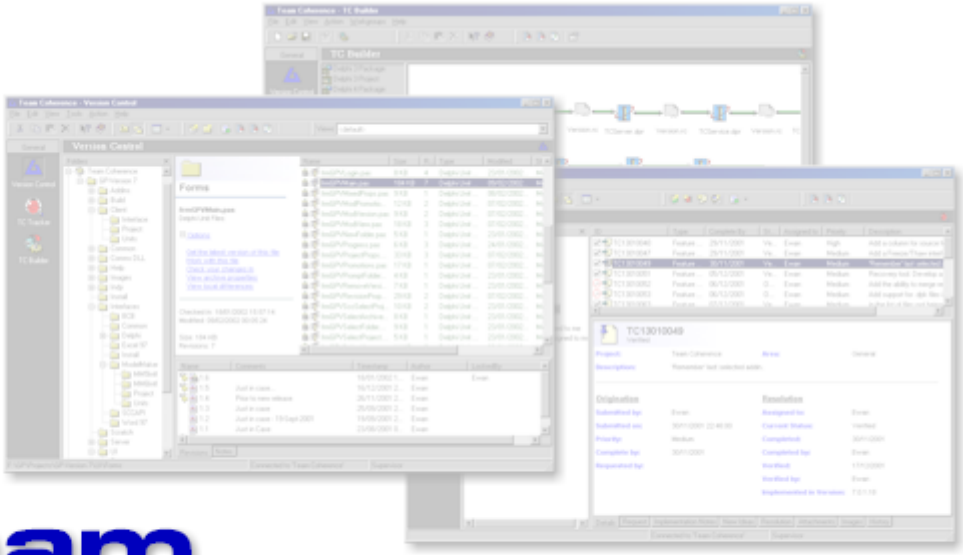
MCN Software Solutions



Team Coherence

www.teamcoherence.com

TC Tracker
User Guide

MCN Software Solutions

TC Tracker User Guide

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Table of Contents

Introduction

Part I

1 Introduction

TC Tracker is an Issue tracking addin to the popular Team Coherence Software Configuration Management (SCM) tool. TC Tracker integrates tightly with Team Coherence to add issue tracking and to link issues with file archives.

Using TC Tracker, you can log and control the progress of various types of Issues and maintain a history of how the issues progress. The tight integration with Team Coherence means that Issues can be associated with project files, and vice versa.

This help file contains all the information you should need to guide you while using TC Tracker.

- Guide to TC Tracker Documentation
- Overview
  - What is TC Tracker
  - How to Buy TC Tracker
  - End User License Agreement
- Getting Started
  - Objects Maintained by TC Tracker
  - Using TC Tracker
- Tasks

Guide to TC Tracker Documentation

Part II

2 Guide to TC Tracker Documentation

2.1 Typographical Conventions

- ***Bold Italics***

Indicates button presses or menu selections required for an action

- Forward Slash **/**

Separates menus and their associated commands. For example ***Action / Checkin*** means select Checkin from the Actions menu

- Block Quotation

Emphasizes important information and useful hints

- UPPERCASE

Indicates keys or key combinations you can use. For example, press the ENTER key

2.2 Mouse Conventions

- **Click**
Point to an object with the mouse pointer and press the left mouse button.

- **Double-click**
Press the left mouse button twice in quick succession.

- **Right-click**
Press the right mouse button

- **Drag**
Press and hold the left mouse button while dragging the selected object(s) to another part of the Screen.

- **SHIFT+Click**
Press and hold the SHIFT key and make a selection, allowing you to select a series of objects.

- **CTRL+Click**
Press and hold the CTRL key while clicking on objects, allowing you to select objects randomly.

- **CTRL+Drag**
Press and hold the CTRL key while dragging objects.

Overview

Part III

3 Overview

3.1 What is TC Tracker?

TC Tracker is an Issue tracking tool designed specifically to integrate with the popular SCM tool, Team Coherence. TC Tracker allows you to track the progress of Issues (Bug Reports, Feature Requests, Enhancements, Tasks, and Work Requests) as they pass through various stages to eventual completion.

A large amount of information can be stored against Issues, including images and screenshots. User definable fields per Issue type and HTML Templates for screen layout mean that the amount of information you store, and how it is displayed is entirely configurable. In addition, tight integration with Team Coherence allows you to associate actual source files and documents with individual issues.

TC Tracker has been designed with the future in mind. It is easily extendable through addins and has a modular architecture to allow for future enhancement.

3.2 Team Coherence Server

Team Coherence Server is the core of the Team Coherence suite of configuration management tools, and is a required component of TC Tracker. It provides secure access to the data managed by Team Coherence, and its addins, either through a Local Area Network, or remotely through a WAN or the Internet.

Team Coherence Server can be run as a Service under Windows NT and 2000, or as a standalone application under Windows 9X and multiple instances of the server can be run on the same machine. Each instance of the server represents a Team Coherence Repository.

Information on installing and running the server can be found in the server documentation.

3.3 How to Buy TC Tracker

You can order TC Tracker online directly from our home page, or through one of our many resellers

Home page

www.teamcoherence.com

Email support

support@teamcoherence.com

Post

MCN Software
6 Suttie Way
Bridge of Allan
FK9 4NQ
Scotland

Fax

+44 (0)1786 834908

3.4 A word about Licensing

The TC Tracker licensing model is **not** concurrent. That is: you must have as many licenses installed as you have users that can login to an instance of the Team Coherence Server.

You can have the same licenses installed on any number of servers within your organisation, but each user must be accounted for in the total number of individual licenses.

See also: License Agreement

3.5 License Agreement

See also: A word about Licensing

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Contractor/manufacturer is MCN Software

Contact:
MCN Software
www.teamcoherence.com
info@teamcoherence.com

Getting Started

Part IV

4 Getting Started

4.1 Getting Started

If you are using TC-Tracker as an addin to Team Coherence, then you should already be configured. If you have not yet configured a repository, or are just browsing the documentation, please read the Team Coherence and Team Coherence Server documentation to find out how to create a new repository.

If you are using TC Tracker as a standalone tool, please refer to the following sections for information on connecting to a repository.

- Connecting to a Repository

The following topics describe the objects maintained by TC Tracker, and a bit about the user interface

- Objects Maintained by TC Tracker
- Using TC Tracker

An additional important topic you should check out before using TC Tracker in anger is the topic about Users and Groups. This is covered in the Team Coherence documentation, but is also listed here for reference.

4.2 Objects Maintained by TC Tracker

4.2.1 Repositories

In Team Coherence, a repository is simply a central location, available to all interested users, where the files and issues maintained by Team Coherence are stored. Each repository is controlled by a Server application that contains all the core logic for the Version Control and Issue Tracking functionality.

To all intents and purposes, and as far as TC Tracker is concerned, the repository can be considered a black box that is used to manage the following items:

- Projects
- Issues
- Queries

Connection to a repository is via standard TCP/IP so the server could, if necessary, reside on the other side of the planet and be accessed using a standard Internet connection.

4.2.2 Projects

In TC Tracker, a Project is simply used to group related Issues together and to define which users or groups can carry out specific actions. A repository can contain any number of projects, but each has to have a unique name.

Note that, by default, only Issues assigned to you will be displayed under Projects and Folders. You can also view issues from all users (see the **Show Issues for All Users** checkbox under Tools/Options/General).

Security in TC Tracker is defined at the Project level. Access to the security options is via the Project Properties dialog box (select the Project and choose ***Action / Properties*** from the main menu). The various security levels apply to all Issues contained by the project:

- **Access** - defines which users can specify security privileges
- **Delete** - defines which users can delete an issue
- **Modify** - defines which users can modify an issue
- **Can Complete** - defines which users can complete an issue
- **Can Verify** - defines which users can verify an issue
- **Can View** - defines which users can view the issues contained by this project.

Note that Admin users, and Supervisor, have full access to all issues regardless of these settings.

A Project can contain any number of Folders.

4.2.3 Folders

For every Project, there are one or more folders. Folders are simply an organisational tool used to group issues, for example, by their status or importance. Each user can define any number of folders and use them for any purpose.

It is important to note that folders are created on a per-User basis and are an organisational tool only. For this reason, different users logging into the system will only see the folders defined by themselves and other users may see a completely different folder structure for the same Project.

The main folder contained by a Project is called the **In Tray**. The **In Tray** contains all issues that are assigned to you and have not yet been moved to other folders. All new issues will initially be found in the In Tray.

Note that, by default, only Issues assigned to you will be displayed under Projects and Folders. You can also view issues from all users (see the **Show Issues for All Users** checkbox under Tools/Options/General). In this case, the In Tray will show all issues from all users unless they have been moved into another folder.

4.2.4 Issues

In TC Tracker, an Issue refers to either a Bug Report, Feature Request, Enhancement, Task, Work Request, Information Request, Change Request, Requirement, or Idea. All contain very similar information, but the distinction makes it easier to visually distinguish between the two in our user interface. Although the field descriptions may differ for each type, the data stored is identical in all cases.

In most cases, the options available for any key field are selected from a predefined list (configurable). Free-form fields allow you to enter plain text, or text formatted using HTML.

All changes to key fields are recorded in a History list which cannot be modified. This list provides valuable information about the progress of the Issue.

The information stored for Issues includes:

Area (List)
This is the functional area within the project that this Issue references.

Description
Basic description of the Issue. Displayed in the list view.

Origination

The Origination section defines how the issue was raised, by who, and what priority was assigned to it.

Submitted by
Displays the name of the user that created the Issue (cannot be modified)

Submitted on
Displays the date that the Issue was created (cannot be modified)

Priority (List)
Specifies the priority of the Issue.

Complete by
Specifies the date that the issue should be completed by. If an issue is unresolved after this date, it is highlighted in the listview.

Requested by/Reported by
Freeform text that allows you to define who requested the change or reported the bug.

Severity (Bugs)(List)
Specifies how serious the reported Bug is.

Reported in Version (Bugs)(List)
Defines the Version of the product that the issue was reported in. If Tracker is integrated with Team Coherence, a list of existing Version Labels will be displayed.

Resolution

The Resolution section describes the current and final status of the Issue.

Assigned to (List)
Shows who the Issue is currently assigned to.

Current Status (List)
Specifies the current status of the Issue.

Completed
Specified the date that the Issue was marked as 'Completed'. This field cannot be modified, but changing the Status to another value (other than 'Verified') will clear this date. The change will be recorded in the History.

Completed By (List)
Specifies the User that marked this issue as 'Completed'. Setting this field, by whatever method, will set the Completed date value.

Verified
Specified the date that the Issue was marked as 'Verified'. This field cannot be modified, but changing the Status to another value will clear this date. The change will be recorded in the History.

Verified By (List)
Specifies the User that marked this issue as 'Verified'. Setting this field, by whatever method, will set the Verified date value.

Implemented in Version (List)
Defines the Version of the product that the issue was implemented in. If Tracker is integrated with Team Coherence, a list of existing Version Labels will be displayed.

Closure Category (Bugs) (List)
Specifies a category that can be used for reporting.

Request / Report

Free-form notes about why the issue was raised. This field can be either plain text, or can be formatted using HTML to include tables, different fonts, and colour.

Implementation Notes / Notes

More free-form notes to allow you to specify how the issue was implemented, or record any other information.

New Ideas / Other

More free-form notes to allow you to specify any new ideas that arose during the implementation or resolution of this issue. This field can be included in the page report.

Resolution

Yet another free-form note field. This one can be used to describe how the issue was resolved.

Attachments

This 'field' allows you to attach documents to the issue. In particular, it allows you to directly link an issue to one or more Team Coherence archives. Normal files, when associated with an Issue are ***not*** stored as part of the Issue, so avoid using local pathnames or these files may not be accessible to others. To make sure that all documents are accessible to others, archive them using Team Coherence before adding them. In this way, you also get a history of the changes to the documents.

Images

Images can be stored against an Issue. In most cases, a picture can better describe why an issue was raised than words. Images are stored as part of the issue, so are available to anybody who can view the Issue. Images can be pasted from the clipboard as well as being loaded from file. All

images are compressed at the server-side.

History

The history 'field' displays all the changes made to key fields during the life of the Issue. The details cannot be modified and provide a valuable history of who did what in the resolution of th issue.

4.2.5 Queries

With a large number of issues defined in a repository, it can be difficult to keep track of which issues are assigned to who, and what their current status is. Queries allow you to define any number of 'Views' of this information and quickly switch between these views.

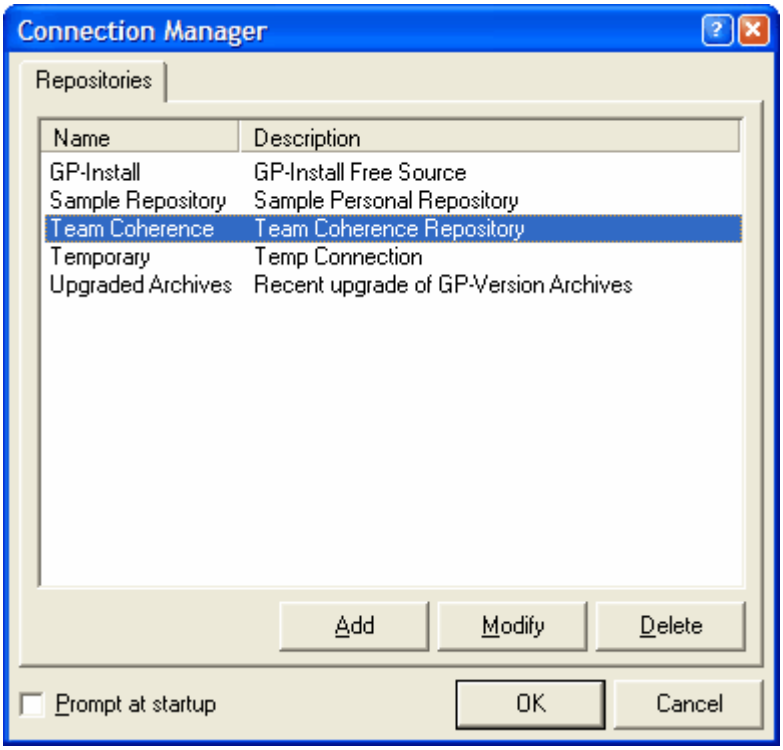
Shared queries provide a way to define a set of standard queries that might be useful to all users connected to a repository, while User queries allow individual users to define their own. Temporary queries allow users to create queries for one-off tasks such as reporting, and are deleted when TC Tracker is shut down.

4.3 Using TC Tracker

4.3.1 Connecting to a Repository

Before you can start the TC Tracker client application you must tell Tracker the location of a valid connection to a running repository. This can be done using the Connection Manager.

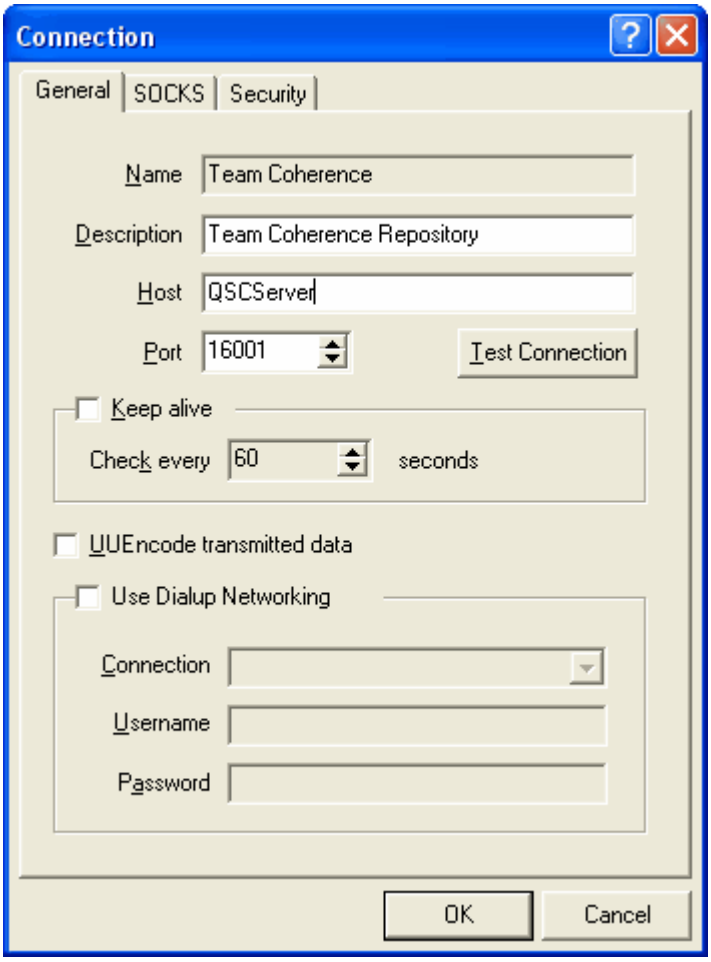
Note that this only applies to the standalone version of Tracker. With the addin for Team Coherence, connection is done through Version Manager.



To start the connection manager select ***Start / Programs / MCN / Team Coherence / Connection Manager***

The Connection Manager displays a list of known connections to repositories. If you want this dialog to be displayed each time you start Team Coherence, make sure that ***Prompt at startup*** is checked. It can also be displayed while running Version Manager by selecting ***Tools / Connection Manager...*** from the main menu.

To add a new connection, click on the ***Add*** button. To modify an existing connection, click on the ***Modify*** button. This will display the properties dialog box for the selected or new connection:



The Connection Properties dialog box allows you to specify the connection parameters to an existing repository. As well as a Name and Description for the connection, used to identify the connection, you must specify:

Host
The host is the address of the computer that is running the instance of the Team Coherence Server you wish to connect to. You can either use the HostName for the machine, or can specify a valid IP address.

Port
The Port is the port that the instance of the Team Coherence Server you are connecting to is listening on. This information will be available from the person responsible for maintaining the server.

Dialup Networking
If you are accessing a remote repository via a dialup connection you can select an existing DUN connection to use from the list. You also need to enter a valid username and password for that connection.

Security
If the Team Coherence Server you are connecting to has had an additional security key assigned to it, you will also need to enter that key in the Security page. The key should be supplied by your system administrator.

Note that this security key is *only* required if a key has been applied to the server.

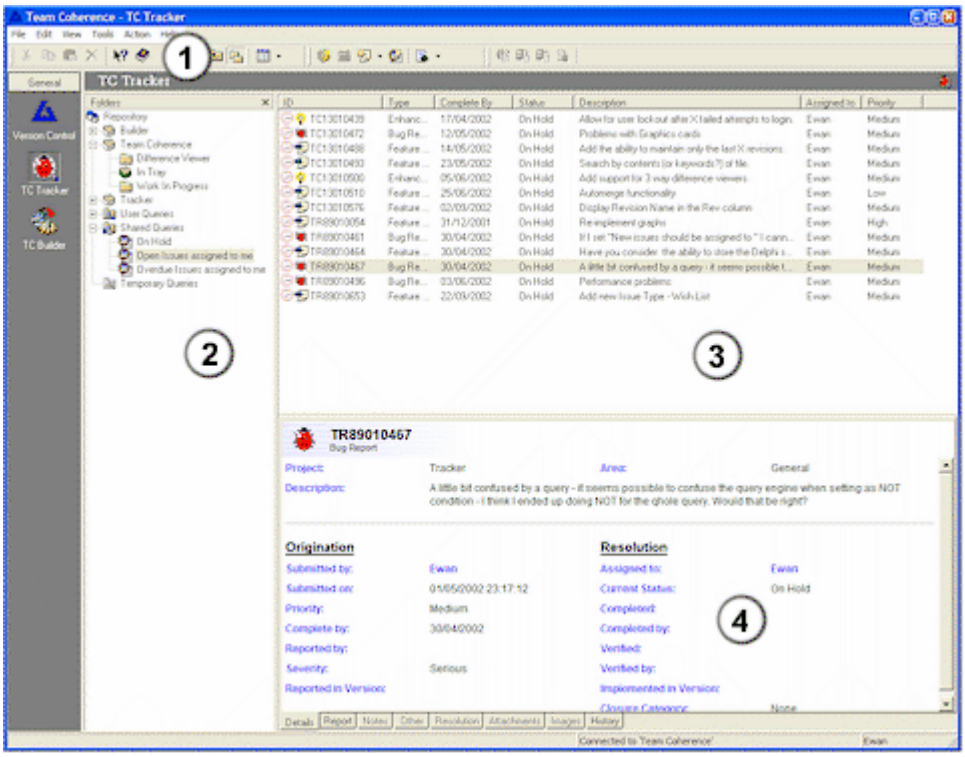
Once the parameters have been set for this connection, you can use the ***Test Connection*** button

to check that the connection is valid. This will try and connect to the server and wait for a valid reply.

4.3.2 Visual Elements

The main visual element in TC Tracker allows you to get an overall view of the Issues contained in a repository. It is also where most of the administrative tasks are carried out.

To access TC Tracker, use the link under the Windows ***Start*** menu and switch to the TC Tracker window.



The main TC Tracker window is split into four areas. The actual contents of these areas may vary based on the current selection.

1) Main Menu / Toolbar
The main menu and toolbar give full access to the features of TC Tracker. Some menu options are dependent on the current selection, and the ***Action*** menu is also available as a context menu when right-clicking in some of the other windows.

2) Folder Pane
The Folder Pane is used to display the Projects and Queries contained in a Repository. Right-clicking on any object in this pane will display a context menu based on the current selection.

Selecting an object in this pane will cause the Details Pane to update based on this selection.

3) List Pane
The List pane displays the list of objects directly contained by the object selected in the Folder Pane. Depending on the current selection, this is normally a list of the Issues or Queries contained or referenced by this object. Right-clicking on any object in this pane will display a context menu based on the current selection.

Selecting an object, or multiple objects, in this pane will cause the Detail and pane to update based on this selection.

4) Detail Pane
The detail pane displays details for the currently selected object in the Folder or List pane, depending on which is currently active. It contains a number of pages based on the current selection and may contain pages created by addin applications.

Tasks

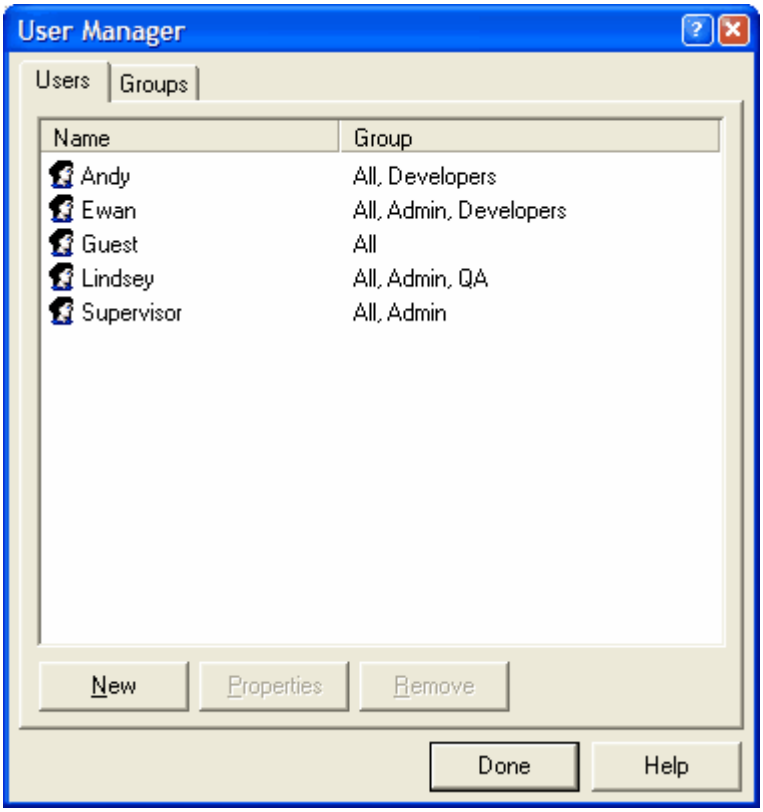
Part V

5 Tasks

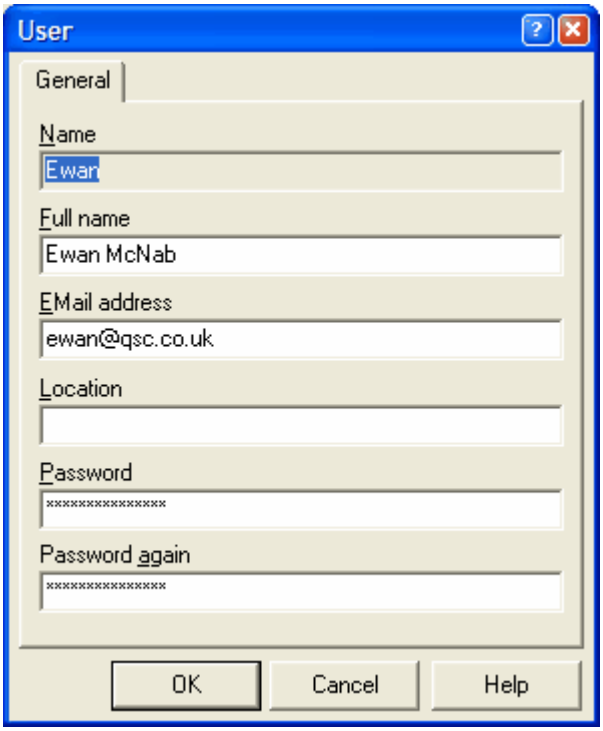
This section will outline how to carry out some common tasks in TC Tracker. This is by no means an exhaustive list of the features available in TC Tracker, but is meant to help get you up to speed quickly.

5.1 Users and Groups

One of the first things to do before defining security is to group users into logical groups according to their function. User management in TC Tracker is carried out using the User Manager dialog. This is accessible to ADMIN users by selecting ***Tools/User Manager…***:

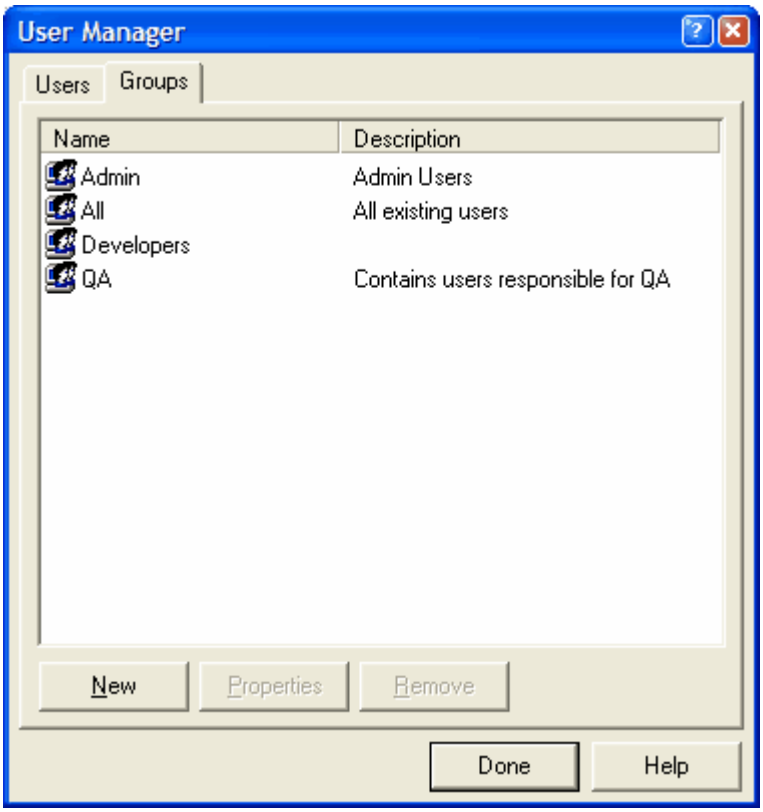


This dialog is split into two pages Users (above) and Groups. The Users page lists all users defined for the current repository as well as the groups they belong to. To modify an existing User, select the user and click the ***Properties*** button. To add a user, click the ***New*** button. This displays the User Properties dialog box:

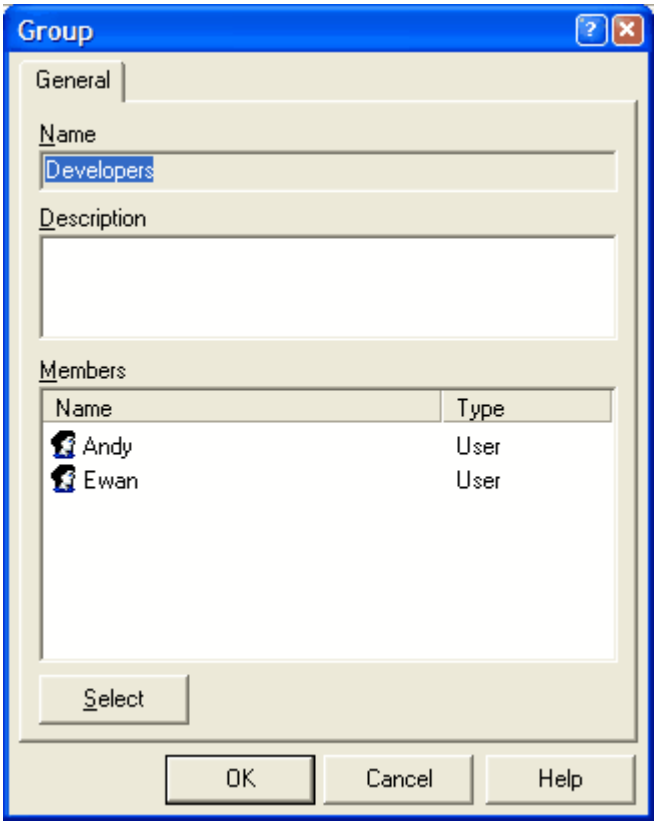


The ***Name*** property is the name that the user logs in under. In addition, a valid password is required. If you change the password for a user, they will need to enter the new password the next time they log in.

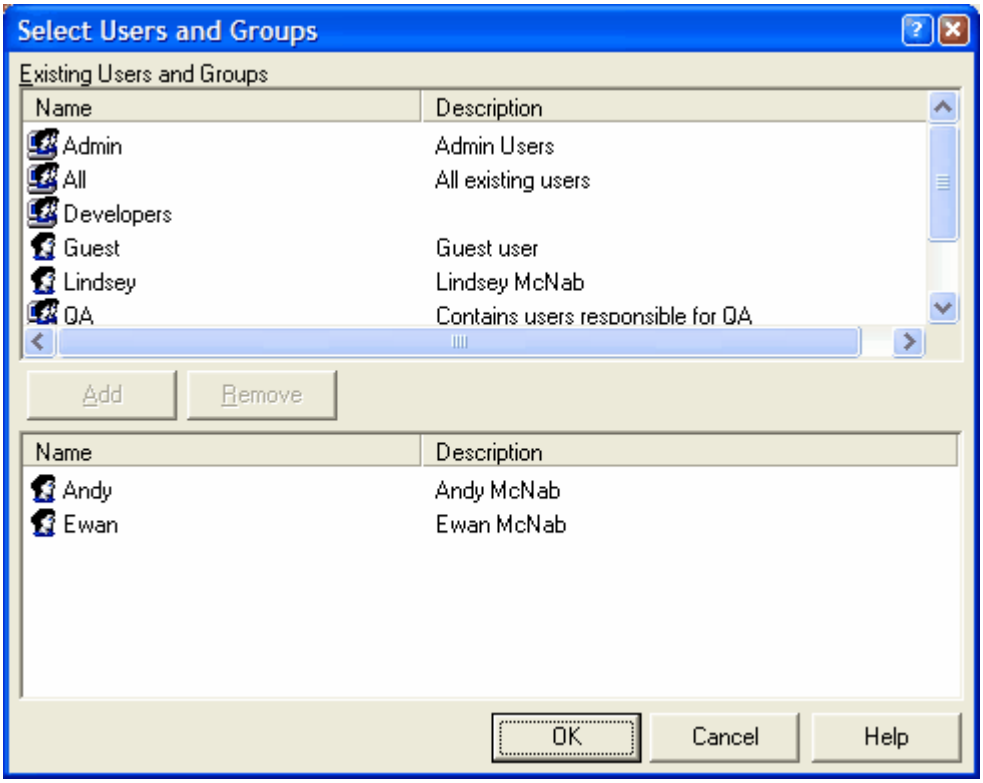
The Groups page of the User Manager allows you to organize users into logical groups based on their function:



Groups can contain other groups as well as users, so care is required when defining the members of a group. To modify an existing group, select the group and click the ***Properties*** button. To create a new group and assign users to it, click on the ***New*** button:



To add and remove members of a group, click the ***Select*** button. This displays the Select Users dialog that is also used elsewhere in TC Tracker when defining security:



To add a user or group to the group, select the item in the upper list and click the ***Add*** button. To remove an item, select the item in the lower list and click the ***Remove*** button. If you are adding a group, Team Coherence will check for recursion (i.e. Group1 containing Group2 containing Group1) and will disallow the action.

When you have finished selecting the members of the group, press the OK button to save your changes.

5.2 Creating a Project

Before you can add Issues to TC Tracker, you need to create at least one Project. Projects allow you to organise issues into logical groups. In addition, Projects allow you to specify which users have what access to the issues contained within the project.

To create a new Project, select ***Action / New / Project*** from the main menu, or press the New Project button in the toolbar. When prompted, enter a name for the project. This has to be unique within the repository.

The project is created with default security settings based on the current user. To modify the security settings, select the project and select ***Action / Properties*** from the main menu. Security settings are discussed under Projects.

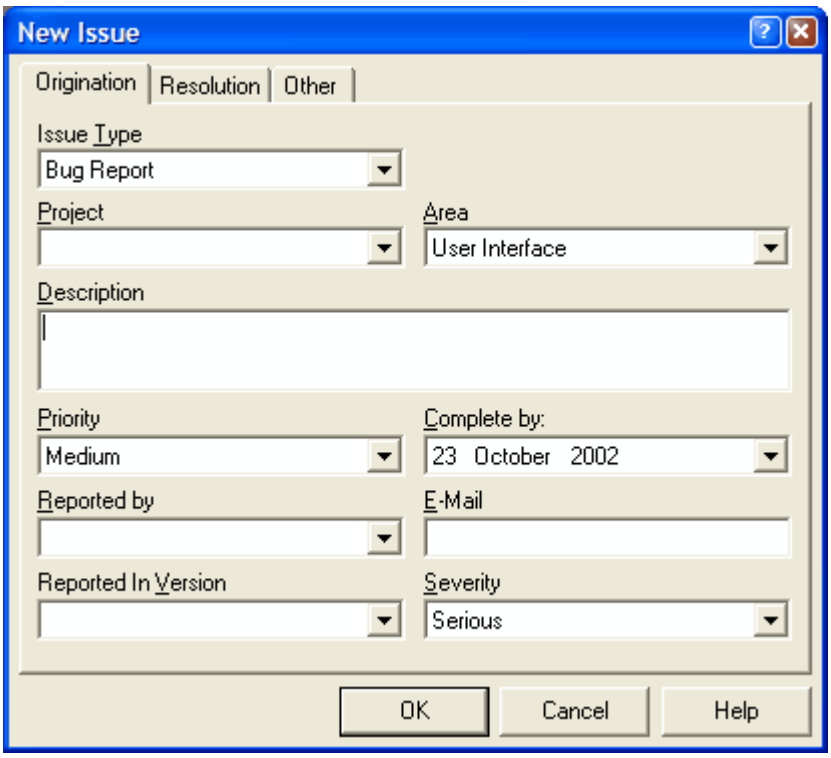
If another user has created or modified an object since you have started TC Tracker, the new settings will not show up on your system until you do a refresh. To refresh the local cache, press **F5**, or select **View / Refresh** from the main menu.

5.3 Creating an Issue

Issues are the core element in TC Tracker and are used to maintain all the information associated with Bug Reports and Feature Requests. Once an issue is created all changes to the values of the key fields maintained by the issue are tracked and reported in the History report.

To create a new Issue, select ***Action / New / <Issue Type>*** from the main menu, or click on the relevant button in the toolbar.

The following dialog is displayed:



Most of the important fields will already be filled in with (configurable) default values, so the initial description of the issue is all that is required.

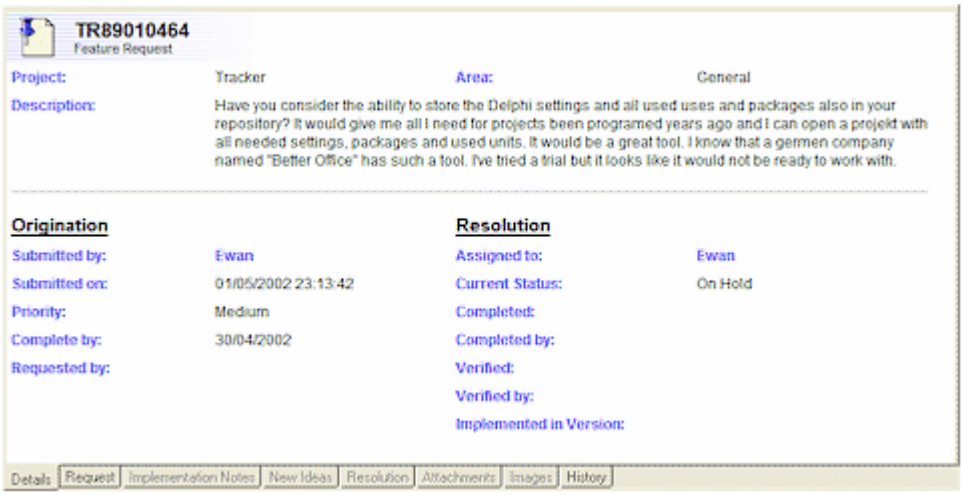
Pressing the OK button will validate the information and create the new issue.

5.4 Updating an Issue

There are several ways to update an existing issue. TC Tracker makes extensive use of HTML to make access to Issues and related information as easy as possible.

Note: if another user has created or modified an object since you have started TC Tracker, the new settings will not show up on your system until you do a refresh. To refresh the local cache, press **F5**, or select **View / Refresh** from the main menu.

On the details screen, the following view is displayed when an issue is selected:



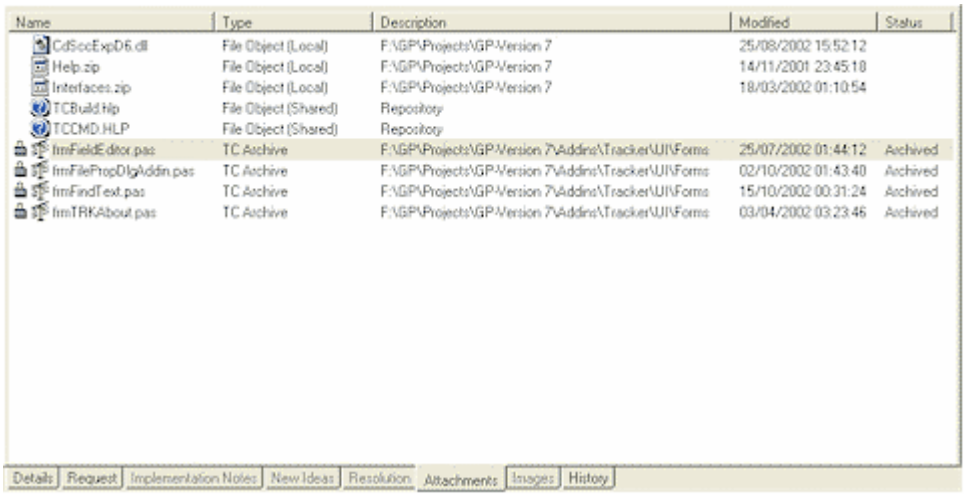
Moving the mouse over the description of any editable field and clicking it will pop up an editor for that particular field.

An issue can also be edited using it's property sheet. The Issue Properties dialog box can be accessed by selecting the relevant issue and choosing ***Action / Properties*** from the main menu.

The various notes fields can be edited by selecting the relevant page in the above view and either clicking on the Properties hyperlink, or double-clicking on the page itself.

Attachments

The Attachments page allows you to add and manipulate references to either standard files, or Team Coherence archives:



To add a Team Coherence Archive to the current Issue select ***Action / Add / TC Archive*** from the main menu. This will display a selection dialog to allow you to select the relevant archives.

Once associated with the Issue, Issue properties are available from the Check In, Check Out and Properties dialog boxes of Team Coherence. In addition, the standard Check In, Check Out, Get and Properties menu options and tool buttons are available for the selected archives within TC Tracker.

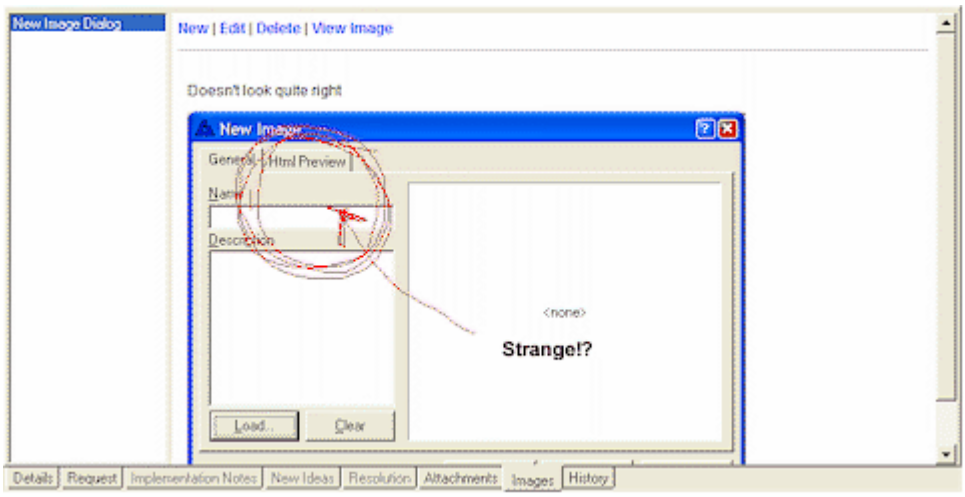
Two other types of attachment can be made:

Standard file attachments. These are not stored in the repository, but are references to files stored on your local machine or a network drive. These types of attachment may not be available to other users.

Shared file attachments. These attachments are stored in the repository and are available to all users with adequate rights. Double-clicking on one of these files opens it in the default editor for the file and, if any changes are made, they can be stored again in the repository.

Images

Images can be associated with any issue. This makes it easier to describe the particular issue, and can be referenced in the notes pages. Images and screenshots are stored (compressed) as part of the Issue, so are always available to users viewing the issue (although images are stored with the issue, they are only ever retrieved from the server when viewed). To add an image to an issue, select the Images page:



Either click on the New hyperlink, or right-click and use the popup menu. Once an image is defined, it can be modified by clicking the Edit hyperlink.

Images can be pasted into the Edit Image dialog box.

History

The History page displays a history of the changes to the current Issue. The details on this page cannot be changed but are provided for information and reporting purposes:

Author	Timestamp	Description
Ewan	14/11/2001 03:49	**Assigned To** changed from *Andy* to *Ewan*
Ewan	13/11/2001 01:49	**Severity** changed from *Serious* to *Minor*
Ewan	13/11/2001 01:49	**Assigned To** changed from *Ewan* to *Andy*
Ewan	13/11/2001 01:49	**Area** changed from *General* to *User Interface*
Ewan	12/11/2001 22:40	**Created**

Details | Report | Notes | Other | Resolution | Attachments | Images | History

5.5 Moving an Issue

By default, all new issues will appear in your In Tray folder. You can move issues into other folders simply by dragging the issue and dropping it onto the relevant folder. If the Folder is part of another Project, the Issue will automatically be moved into that project (access restrictions allowing).

You can also move issues by using Cut and Paste: Select the issue and select ***Edit / Cut*** from the main menu. The issue icon will change to reflect the state of the issue. Select the Folder you want to move the issue to, and select ***Edit / Paste*** from the main menu. The Issue will then be moved to the new Folder.

Note: Issues are copied to the clipboard in two formats. The first format is for internal use, but there is also a textual representation of the issue that can be copied into text-based applications. The text version in the clipboard is the XML representation of the Issue.

See Also: Duplicating an Issue

5.6 Duplicating an Issue

It is quite common to have a new issue that is similar to an existing one. In TC Tracker, you have the ability to duplicate an existing issue when creating a new one. This can save a certain amount of time when creating new Issues.

To duplicate an existing Issue, select the Issue in question and choose ***Edit / Copy*** from the main menu. You can then duplicate the issue in any Project by selecting the project and choosing ***Edit / Paste*** from the main menu.

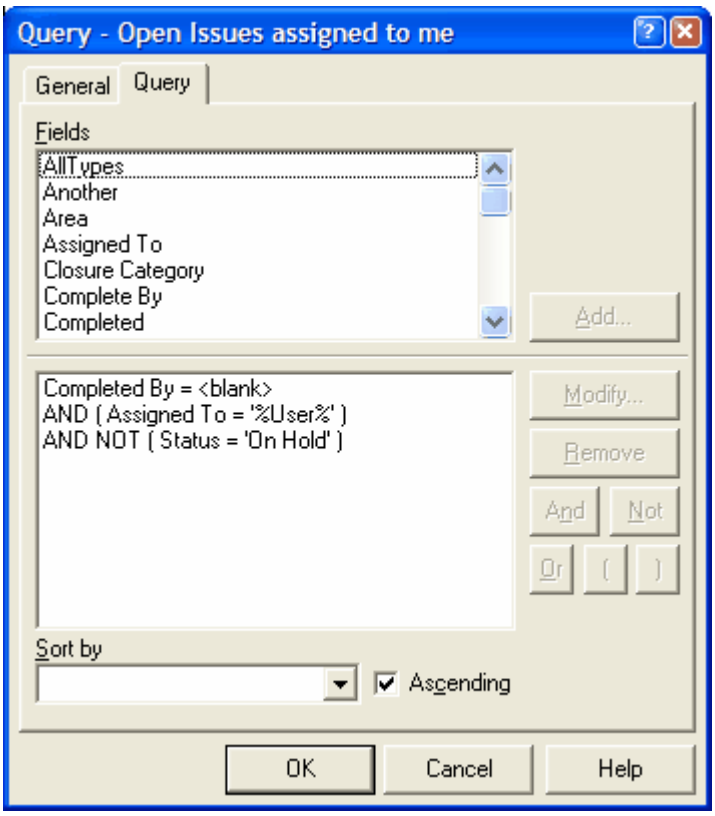
When pasting an Issue, a new issue is created using the details of the issue that was copied. If the Issue is being duplicated (as opposed to being Moved), the History of the new issue is changed to reflect that it is a new Issue.

Note: Issues are copied to the clipboard in two formats. The first format is for internal use, but there is also a textual representation of the issue that can be copied into text-based applications. The text version in the clipboard is the XML representation of the Issue.

5.7 Defining a Query

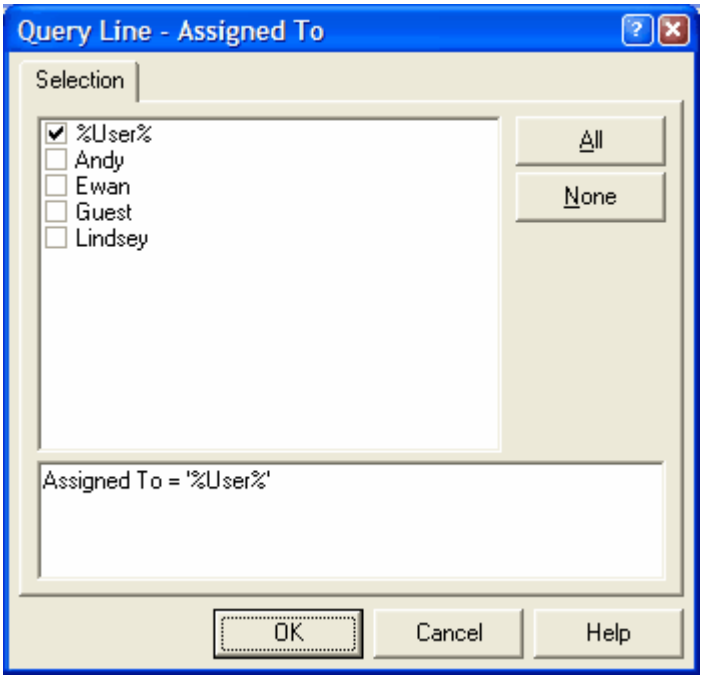
With a large number of issues defined in a repository, it can be difficult to keep track of which issues are assigned to who, and what their current status is. Queries allow you to define any number of 'Views' of this information and quickly switch between these views.

Queries are easy to create and allow more pertinent information to be displayed when required. They can also be used as the basis of reports. To create a new Query, select ***Action / New / Query*** from the main menu, or click on the New Query button in the toolbar. The Query definition dialog box will be displayed:



The General page allows you to enter a Name and Description for the query as well as to specify whether it is Temporary, User, or Shared. The Query page allows you to define the query itself.

The actual fields of the issue are displayed in the top list, and the current query definition is displayed below. To add a field to the query, select the field and press the Add button:



The actual contents of the dialog depend on what type of field is being added, but full selection criteria can be specified for each field.

The And, Or, Not, and Brackets buttons can be used to define complex relationships between the various criteria entered.

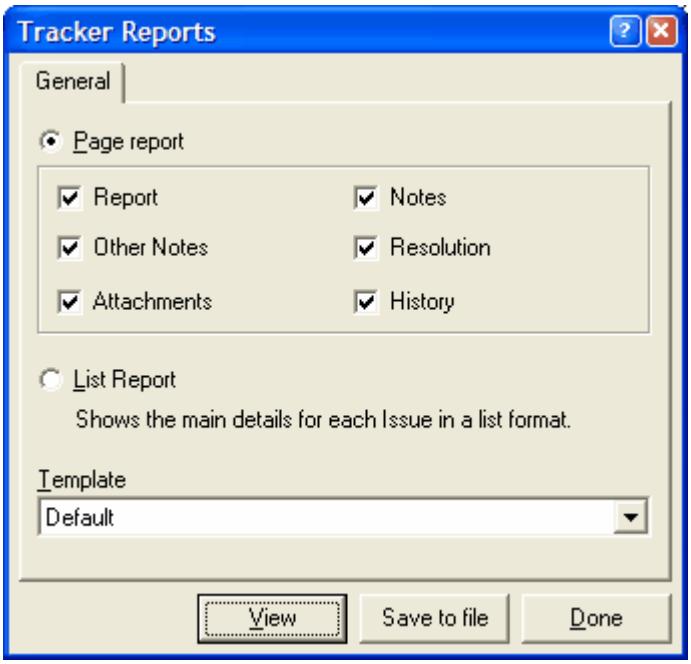
Pressing the OK button will create the new query. Selecting a query in the main window causes the query to be executed against all issues in the repository and the results to be displayed in the List Pane.

The results of a query are fully editable, and changes that affect the query results will cause the query to be re executed.

Note: if another user has created or modified an object since you have started TC Tracker, the new objects will not show up on your system until you do a refresh. To refresh the local cache, press **F5**, or select **View / Refresh** from the main menu.

5.8 Viewing a Report

Reports basically give you the ability to print out the information contained in the TC Tracker repository. Reports can be based either on the current selection, or the results of a query. To view a report, select the relevant objects in the main Window and select ***Action / Report*** from the main menu. This displays the report dialog for specification of the information you want listed:



You have a choice of either a page style report containing most of the information associated with the issue, or a list report which displays the main fields in a basic list report.

The reports are output as HTML using the selected Template, and can either be displayed and printed using the internal viewer, or can be saved to file for accessing later.

Saving a report to a file allows the report to be Emailed or sent to other users who may not have TC Tracker installed. The reports will be stored in HTML format and can be viewed by most internet browsers.

See Also: Exporting Issues, Sending via Email

5.9 Exporting Issues (XML)

In TC Tracker, you can export Issues to an external file in XML format. This allows you to use more complex reporting tools that can read and report on XML data, or to send details of the issues to other people who may not have TC Tracker installed.

To export an Issue, Query, Folder, or Project to an XML file, select the relevant objects and select ***Action / Export to XML*** from the main menu. You will be prompted to enter a filename and the selection will then be exported.

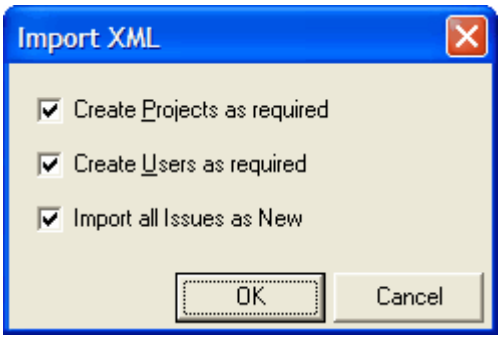
Note: the date values are exported in Local time.

See Also: Viewing a Report, Sending via Email, Importing Issues

5.10 Importing Issues (XML)

Issues can be imported from XML files provided the field names match those exported by the export utility.

To import Issues previously exported, or generated by another application, select ***Tools/Import Issues from XML...*** from the main menu. You will be prompted to select the XML file and the following dialog will be displayed:



Create Projects as required

If this option is checked, any projects defined in any of the imported Issues will automatically be created if they do not already exist. If this option is not checked, and any of the Issues refer to projects that do not already exist in the repository, the validation of the XML will fail.

Create Users as required

If this option is checked, any users defined in any of the imported Issues will automatically be created if they do not already exist. If this option is not checked, and any of the Issues refer to users that do not already exist in the repository, the validation of the XML will fail. If a user is created by the import routine, it will have the default password.

Import all Issues as New

If this option is checked, all issues in the XML file will be created in the repository. This is the same as if all Issues in the XML file have a blank ID.

Once the ***OK*** button is pressed, the import will begin.

If an Issue in the XML file has a blank ID, a new Issue will be created in the repository. If it has a valid ID, the import routine will try and match the Issue with an Issue existing in the repository.

5.11 Sending Issues via EMail

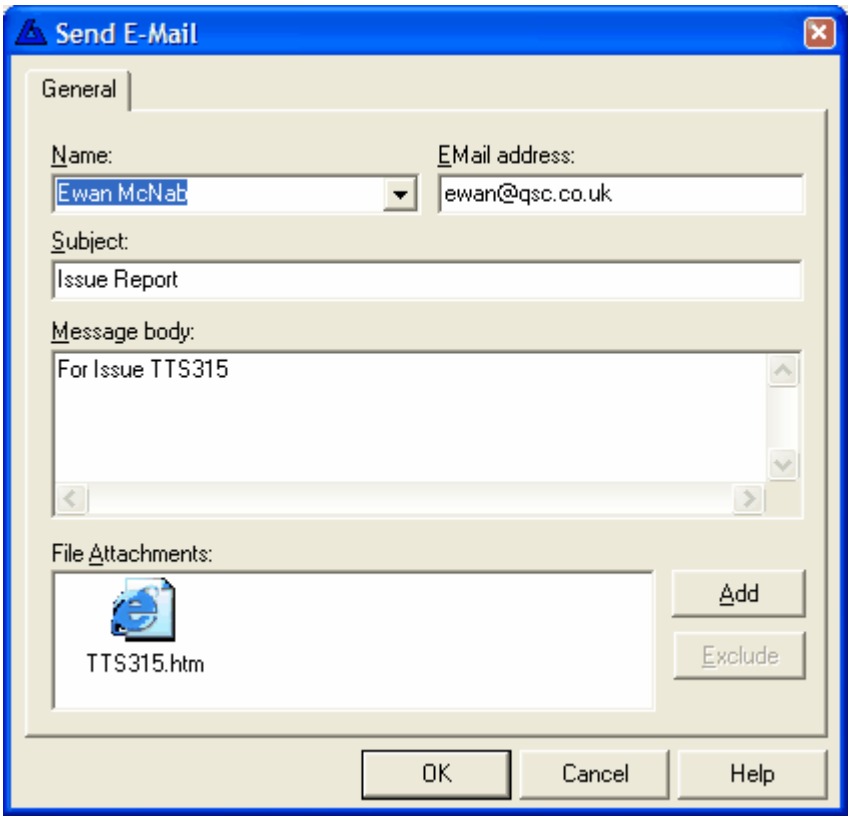
There are several methods of sending Issues to other users who may not have TC Tracker installed, or to the users who reported the issues in the first place.

Note: the Default Email capability in TC Tracker is based around MAPI and a MAPI compliant Email package must be installed for it to work. Another Email protocol (SMTP) is supported and can be installed using the Options Dialog. If neither of these protocols suit, you can still send issues by exporting or reporting to a file and attaching the generated file to an Email using the Email package.
For more information on sending Email via SMTP, see the topic: Configuring Tracker to support SMTP.

The easiest method, if you have entered a username and email address in the Requested By fields of the Issue, is to simply click on the special hyperlink created for that issue:

Priority:	Medium
Complete by:	04/06/2002
Requested by:	**Ewan McNab**

When you click on the username, the current issue will be exported to an HTML file and attached to an E-Mail addressed to that user. Before the mail is sent, the mail definition form will be displayed to allow you to modify it:



Pressing the OK button will generate the final Email.

Alternatively, you can select multiple Issues and other objects and Email them either as XML or HTML documents to other users. To do this, select the relevant objects and choose ***Action / Send via Email / as XML...*** or ***Action / Send via Email / as HTML...***

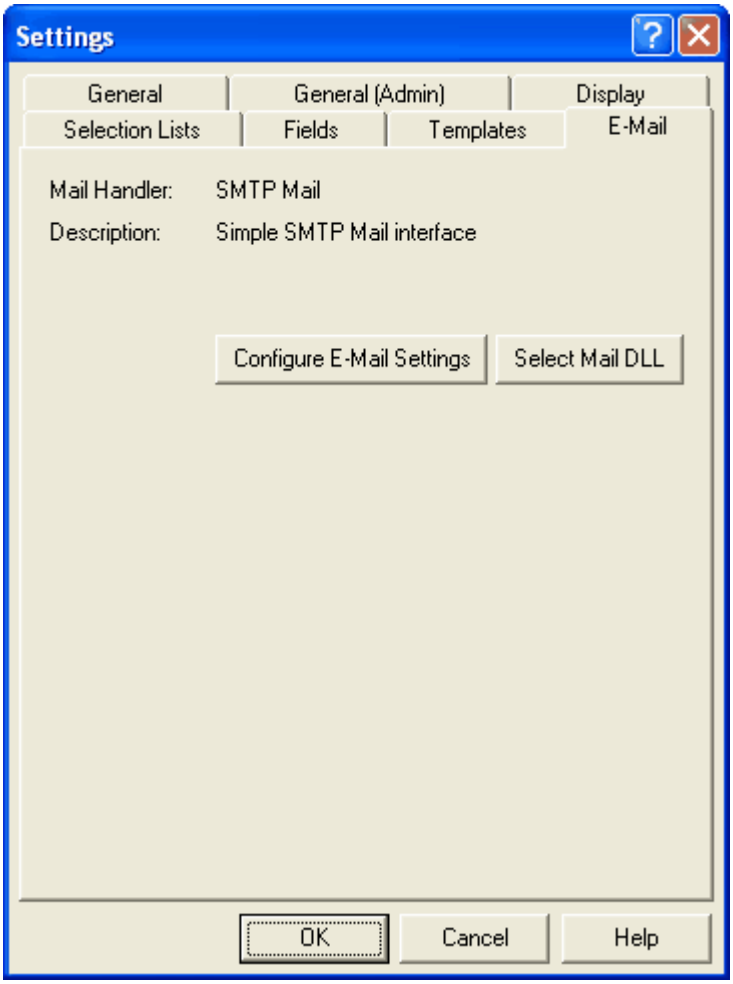
The selected objects will be extracted to the relevant format and attached to an Email for sending.

See Also: Reports, Exporting Issues

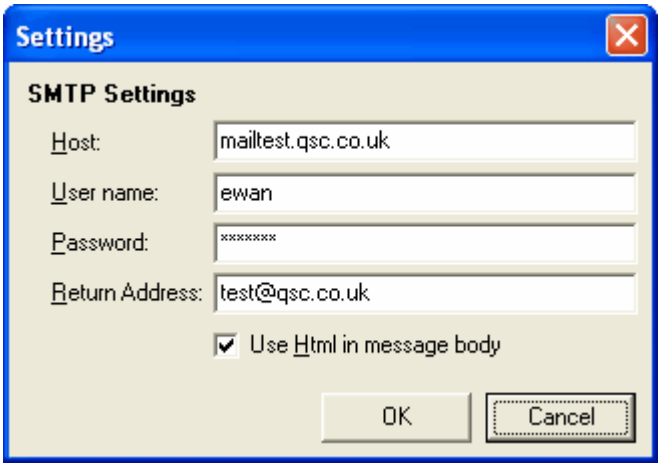
5.12 Configuring Tracker to support SMTP

By default, Tracker supports sending of Email through MAPI. If required, you can also send mail directly via SMTP if you know your SMTP settings. Using this option allows you to format the contents of the Email message using HTML, and include associated images in the message.

To install SMTP support, select ***Tools/Options*** from the main menu and select the ***E-Mail*** page:



Click on the ***Select Mail DLL*** button and choose the **SMTPMail.dll** file from the Tracker installation folder. SMTP support requires certain information to work. Clicking on the ***Configure E-Mail Settings*** button allows you to configure SMTP support:



Use this dialog to configure the support for SMTP send of Email

Host
This is the hostname of your SMTP server

User Name/Password
Enter the username and password you use to access your Email via SMTP

Return Address
This is the return address associated with all EMails you send through Tracker.

Use HTML in message body
If you check this option, the details of the Issue you are sending, including any associated Images, will be included as the message body of all emails sent.

See Also: Sending Issues via Email

5.13 User defined fields

Tracker comes as standard with the most commonly used fields for Issue tracking. However, these may not sufficient for all organisations. User defined fields allow Admin users to define any number of additional fields that can be used to store extra information against issues.

Combined with Templates and Queries, this allows you to store and display information however you like. There are four basic field types that can be added:

String

String fields can be used to store any amount of textual information against an issue, or can be restricted to a set of options. You can specify a maximum size of the field, or allow unlimited text. A text field could be used to enter keywords which could be combined with a query to create a rudimentary helpdesk.

Date

Date fields can be used to store additional dates against issues, for example the date a client was notified of an update, etc. Date entry is via the calendar popup, and blank dates can aslo be stored.

Integer

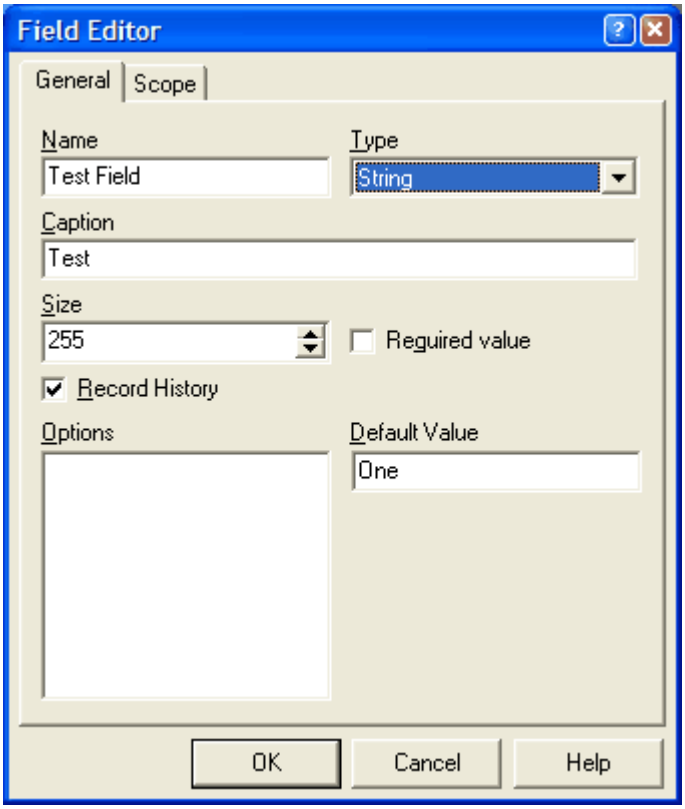
Integer fields can be used to store integer data against issues, for example the number of times a particular issue has been reported.

Number

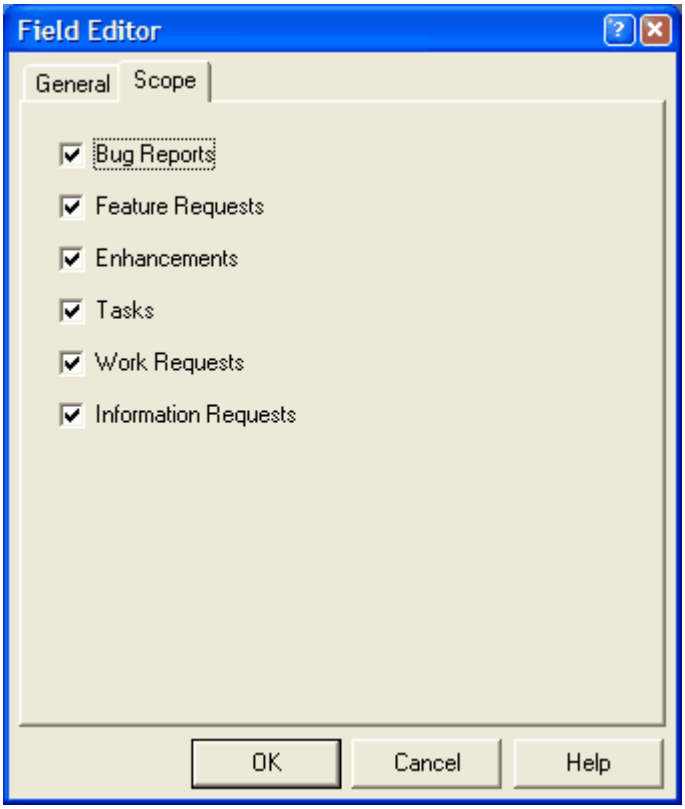
Stores floating point data against Issues.

Fields can be marked as **Required**. If a field is marked as required, the user must enter a value or select an option before the changes to the Issue can be saved. For all types of field, you also have the option of adding it to the **History** list. This will record all changes to that particular field, and who made the change.

To add and modify fields you need to be logged in as an Admin user and select ***Tools / Options... / Fields*** to display the following dialog box:



In addition to the type of field, you can also specify the Scope:



The Scope page allows you to define which type of Issue that you want the Field to be associated with. By default, all new field definitions are associated with all issue types.

For more information on the meaning of the options, open the dialog in TC Tracker and click on the ? button.

5.14 Templates

Templates allow you to create custom screen layouts that can be applied to individual issues, thus allowing you to completely define what is displayed on screen. In addition, report templates allow you to create additional reports and specify different layouts for these reports.

Templates use plain HTML to define the layout and special fields that are replaced with actual field values when displayed or printed. For screen layouts, there are also special link formats that allow you to insert links to individual field editors. Templates have full access to User Defined Fields.

Maintenance of templates is carried out via the ***Tools / Options... / Templates*** menu option and is available only to Admin users. The built-in editor is used to modify template sections but, since it is not wysiwyg, you may find it easier to use an external editor and paste the results into the built-in editor.

There are three types of template:

Screen

This type of template allows you to define the layout of the visual elements of the pages displayed in the Detail Pane of the main screen. This template type is subdivided into separate sections representing the individual tabs:

- Bug Report
- Feature Request
- Enhancements
- Tasks
- Work Requests
- Notes (used for all notes fields)
- Images
- No Images (when no images are associated)
- History
    - Header
    - Odd
    - Even
    - Footer
- Criteria (for Queries)

As well as allowing `%fieldname%` keywords which are expanded to the actual value of the field at runtime, screen templates allow links to be inserted to the built-in field editors. These links take the form:

```
<a href="FieldEdit:FieldName,%25id%25">DisplayText</a>
```

where `FieldName` is the name of the field, `DisplayText` is what the user sees, and `%25id%25` is replaced with the current Issue ID. In the built-in Html editor, all the valid Links and Values are available from the toolbar and the context menu and the relevant Html will automatically be inserted for the relevant fields.

When a user clicks on one of these fields, the default editor for that field type is displayed to allow users to modify the value assigned to it.

Page Report

Page Report templates are similar to the Screen templates in that they are separated into similar sections:

- Header
- Bug Report
- Feature Request
- Enhancements

- Tasks
- Work Requests
- Notes (used for all notes fields)
- Attachments
    - Header
    - Odd
    - Even
    - Footer
- History
    - Header
    - Odd
    - Even
    - Footer
- Footer

Note that, with page reports, the **Header** section must start with the <body> tag and the **Footer** section must end with the </body> tag. The sections in between should not contain either of these tags.

Page Reports can use the <page> tag to force a new page when printing. This tag has no effect when displaying the report.

List Report

The List Report templates can be used to report on the fields common to Bug Reports and Feature Requests. For this reason they have the following section:

- Issue (Bug/Feature)
    - Header
    - Odd
    - Even
    - Footer

Neither the Page Report or the List Report have access to the `<a href` links since they are designed for printed output or use outside TC Tracker.

5.15 Exporting Templates

Templates are used for formatting on-screen and report layouts. There is a facility in TC Tracker to allow exporting of Templates so that they can be imported into other repositories.

When a template is exported to a file the full definition of that template is exported, including the definitions of any User Defined Fields that the templates refer to. This feature means that, if you have defined templates and additional fields to fit a particular requirement, e.g. a HelpDesk application, you can easily redistribute that template, along with all the necessary field definitions, to other users of TC Tracker.

To export a template, select ***Tools / Options / Templates*** from the main menu, select the relevant template, right-click to display the context menu, and select ***Export***. You will be prompted to enter the filename and the template will be stored.

By default, exported templates will be stored in a file with the extension .tkt

5.16 Importing Templates

The ability to export and import Templates allows you to transfer templates between individual repositories and organisations. When you import a template, the User Defined Field definitions required by that template are also imported.

To import a template, select ***Tools / Options / Templates*** from the main menu, right-click to display the context menu, and select ***Import***. You will be prompted to select the template filename and the template will be imported.

By default, exported templates will be stored in a file with the extension .tkt

Dialogs

Part VI

6 Dialogs

6.1 Login

The Login Dialog box is displayed when you first log in to Team Coherence. By default, Team Coherence remembers your Username and Password for subsequent logins.

To change the username you use to login to Team Coherence, select ***Tools / Login as Different User...*** from the Version Manager main menu.

Click What's This? Help in the dialog box for field definitions.

By default, there is one user created when Team Coherence is first installed. This user has full access to all functions. The username is supervisor with the default password of password. This user cannot be deleted, but it is advisable to change the password as soon as possible to prevent unauthorised modification of your files.

6.2 Change Password

This dialog is displayed when you select ***Tools / Change password...*** from the main menu in TC Tracker.

To change your password, enter your new password in the two edit boxes and press the ***OK*** button. If you were added to Team Coherence as a new user, your initial password will be set to **password**. Obviously, one of the first things you should do after starting Team Coherence for the first time is change your password.

Click What's This? Help in the dialog box for field definitions.

See also: Users and Groups

6.3 Change Date Field

This dialog box is displayed when you click on an edit hyperlink for a date-type field and is used to enter or select a date value to assign to that field.

Click What's This? Help in the dialog box for field definitions.

See also: Issues

6.4 Change Value

This dialog box is displayed when you click on an edit hyperlink for a String or Numeric field and is used to enter a value to assign to that field.

Click What's This? Help in the dialog box for field definitions.

See also: Issues

6.5 Change Selection Field

This dialog box is displayed when you click on an edit hyperlink for a list-type field and allows you to select a value from a predefined list to assign to that field.

Click What's This? Help in the dialog box for field definitions.

See also: Issues

6.6 Change Request Field

This dialog box is displayed when you click on the edit hyperlink for the Requested By field and allows you to enter a Name and E-Mail address for the person.

Click What's This? Help in the dialog box for field definitions.

6.7 Text Editor

This dialog box is displayed when you edit one of the text fields associated with an Issue, or when modifying a Template. You can enter either plain text into this field, or can use HTML to add tables, highlight text, etc.

You can preview how the text will be displayed by selecting the HTML Preview page of this dialog.

6.8 Template Editor

The Template Editor allows you to modify the sections of a template. Templates allow you to define how Screen and Reports are displayed and are created using simple HTML.

This screen shows a preview of the currently selected template section and you can use the buttons in the toolbar to modify the Html used to create each section. In addition, for reports that are exported:

CSS - This is the Cascading Style Sheet that will be embedded in the output reports.
Pre <HTML> - The HTML, JavaScript, etc, you enter here will be inserted prior to the <HTML> tag in the output reports.
<HEAD> - The HTML, JavaScript, etc, you enter here will be inserted in the <HEAD> tag before the CSS
Post <HTML> - The HTML, JavaScript, etc, you enter here will be inserted after the final </HTML> tag in the output reports.

The ***CSS***, ***Pre <HTML>***, ***<HEAD>***, and ***Post <HTML>*** buttons apply to the entire template and not simply the section you are editing.

To access this form, select ***Tools / Options... / Templates*** from the main menu and select a template to edit.

6.9 Group Properties

This dialog box is displayed when you select a Group in the User Manager and click on Properties...

It is used to describe the Group and to allow addition of members to the group.

Click What's This? Help in the dialog box for field definitions.

See also: Users and Groups

6.10 Mixed Properties

This dialog is displayed when you view the properties of a selection of different types of object. It displays basic information about the contents of these objects.

Click What's This? Help in the dialog box for field definitions.

6.11 Query Definition

This dialog allows you to modify an Query definition, or create a new one.

To create a new Query definition:

1. Select a Query Folder in the main window
2. Right-click to display the Context menu
3. Select ***New / Query...***

To modify an existing query:

1. Select the Query in the main form
2. Right-click to display the Context menu
3. Select ***Properties...***

Click What's This? Help in the dialog box for field definitions.

See also: Queries, Defining a Query

6.12 Issue Properties

This dialog allows you to modify an existing Issue, or create a new one.

To create a new Issue:

1. Select a Project in the main window
2. Right-click to display the Context menu
3. Select ***New / Bug Report...*** or ***New / Feature Request...***

To modify an existing Issue:

1. Select the Issue in the main form
2. Right-click to display the Context menu
3. Select ***Properties...***

Click What's This? Help in the dialog box for field definitions.

See also: Issues, Creating an Issue, Updating an Issue

6.13 Project Properties

The Project Property Sheet allows you to modify the basic properties and security attributes of a project. To access this property sheet:

1. Select the Project in the main window
2. Right-click to display the Context menu
3. Select ***Properties...***

Click What's This? Help in the dialog box for field definitions.

The Name property of the project is the name that is used in TC Tracker when displaying this project.

The security page allows you to define which users and groups are allowed to modify the properties of the Project, and also who is allowed to modify the Issues stored within the project.

6.14 Query Line

This dialog is used to allow modification of individual lines in a Query. The contents of this dialog are dependent on the type of field the line represents.

Click What's This? Help in the dialog box for field definitions.

6.15 Select Users and Groups

This dialog is displayed whenever you need to select a list of Users or Groups, most commonly when defining security settings or defining Groups.

Click What's This? Help in the dialog box for field definitions.

6.16 User Settings

This dialog allows you to set local options such as which Panes to display, what date format to use, etc. In addition, Admin users can use this dialog to define the selection lists and default values for certain Issue fields.

To access this dialog:

1. Startup Version Manager
2. Select ***Tools / Options...***

Click What's This? Help in the dialog box for field definitions.

6.17 Status Dialog

This dialog shows the status of any action you take in TC Tracker. It lists all objects involved in the action, along with the status after the action is carried out.

Click What's This? Help in the dialog box for field definitions.

6.18 Update Image

This dialog allows you to modify the properties of an Image associated with an Issue. Images can either be pasted from the clipboard, or can be loaded from file.

You can preview how the image will be displayed by selecting the HTML Preview page on this dialog.

Click What's This? Help in the dialog box for field definitions.

6.19 User Info

This dialog displays the properties of a User. If you want to modify user info, see the section on Users and Groups. To send an E-Mail to this user, press the ***E-Mail*** button.

Click What's This? Help in the dialog box for field definitions.

6.20 User Properties

This dialog is displayed when you modify a User in the User Manager. Use this dialog to specify the properties of a user, including the E-Mail address.

Click What's This? Help in the dialog box for field definitions.

6.21 FieldEditor

This dialog is displayed when you edit a User-defined field (UDF) in ***Tools / Options...***. Use it to define additional fields that can be associated with Issues, and to redefine existing UDFs. In addition to specifying the type of data stored by the field, you can specify a default value and a list of options for the user to select from.

This dialog is only available to Admin users.

Click What's This? Help in the dialog box for field definitions.

See also: Issues

6.22 New Template

This dialog is displayed when you create a new Template. It allows you to specify the Name and Description of the template, and to specify the template you want to use as the basis for the new one.

This dialog is only available to Admin users.

Click What's This? Help in the dialog box for field definitions.

Index

- C -

- D -

- E -

- F -

- G -

- H -

- I -

- L -

- M -

- O -

- P -

- Q -

- R -

- S -

- T -

- U -

- V -