



# Support Tracker

## User Guide

Version 1.0  
14 January 2003

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## 1. Overview

This document is User Guide for **CompoundDev Support Tracker** product. It is designed to introduce the company, the product and to describe a basic functionality and usage.

### 1.1. Company overview

**CompoundDev** is a company that was found in 2001 in Oxford, the United Kingdom. The company was transformed from the existing SQA Alliance, a company that was found in 1998 in Prague, the Czech Republic. The company had been found for two main reasons:

1. To create a new business opportunity for the major product, Support Tracker.
2. To support existing products of SQA Alliance such as SQAOLmod, a product designed for archiving received emails.

**The main goals of CompoundDev Company are:**

1. To develop and distribute professional software mainly focused on a software development cycle.
2. Distribute and support existing and new products.
3. Keep developing of software free of errors and conclusions, the software that helps to customers and that makes work easier.
4. Co-operate with 3<sup>rd</sup> parties such as do developing for 3<sup>rd</sup> parties companies as outsourcing and application design.

**CompoundDev** is the company that is fully focused on the customer, the company that has been created to support and communicate with the customer.

## 1.2. Product overview

**Support Tracker** is a Client-Server solution that is designed to help in a software development cycle. The main focus of the functionality is set on tabular archiving of found / fixed and closed errors with availability to use them as a reference for a future development.

The functionality is extended to control the quality of a development and controlling a quality of done work of particular users of the system. The system is designed to help speed up the development cycle and improve the software quality checking during the cycle.

Because in the system there are various types of users inserted data are separated from each other and securely stored in a database. There is no way how a user A could modify or damage data inserted or managed by a user B. The only way how to modify data is through the system functionality.

The functionality of the system is mainly focused on easy-to-use way of working with the software. Many of features of the system are automatics so there are no additional requirements to user to do some extra work.

### **The key features of Support Tracker are:**

1. Easy to use and user friendly
2. Client-Server solution
3. Secure data storage
4. Support of e-mail notification
5. Scalability
6. Hi-functionality

## 2. User pre- requirements

For users there are no special requirements to use **Support Tracker**. The knowledge of using of operating system is recommended. When E-mail subsystem integration is used an additional requirements to users is to know how to operate with used E-mail client such as MS Outlook and fully understand the mechanism of notification that is used by Support Tracker.

It is fully recommended to read *“Client guide”* (this document) and *“How to effectively work with Support Tracker”* manual before using the system. .

For all users of the product is fully essential to understand the process in which Support Tracker would be involved the same as to understand their role in the business process. Without understanding the particular role in the business usage of the product is not guaranteed efficiency of the product. Please pay you're an attention to it.

Through the system there are various roles defined. For each role different pre-requirements are set up. For example, for the system administrator is essential to read *“Installation Guide”* to understand the installation process and then *“Administration Guide”* to understand the role Administrator from the Support Tracker point of view. There are typical requirements also like system knowledge and user rights assignment.

## 3. Users & Roles

This section describes what does it means to be a user in Support Tracker and what does means to have a role assigned by this system. Please pay a close attention to this description because without understanding of your role in the system you will never understand fully the process in which are you involved in.

### 3.1. Introduction to Users & Roles

To be able to use the system you have to be a member of the system – to be the Support Tracker user. Each user must be created by Administrator and assigned to the one of defined user's groups. By the terminology of Support Tracker we say that every user of Support Tracker has a role assigned. Each role is assigned to the specific group. You have to always know which role has been assigned to you and if the role doesn't correspond with your real assignment you have to notify the administrator about this fact.

The Role is a 'function' or 'profession' of the user. By the role you set up what the user does in your process of using the system. There are 4 pre-defined roles, provided by Support Tracker:

- **Administrator** – is administrating the system and it is responsible for running and setting up Support Tracker + other stuff.
- **Developer** – is responsible for a product development, so it is the first part in the product development chain. The profession of Developer should be developer, analyst, technical architect, business analyst, e.g.
- **Tester** – is responsible for a quality of the product. His profession is to find errors in the product before the product is distributed to a customer, so he is the middle part in the product development chain. The profession of Tester should be quality software tester, development support, project leader, project manager, technical architect, e.g.
- **Support** – is responsible for supporting of the existing product and communicating with a customer. Because of that he has an access to the project database and he is able to create new errors, track them and preview them. For the support person it is very important to be able to track through the existing errors to prevent creating a new, duplicity one and to use the existing solutions with his support. Because support is the last part in the product development chain it is the most important. That is the reason why is Support Tracker so called.

All above listed roles are able to co-operate with each other and has a specific rights and function through the system.

### 3.2. User groups abilities

As you've seen there are four types of user groups. Each group has a different meaning through the system and different rights to execute particulars tasks. As a part of the group you need to know what are you able to do with Support Tracker and which tasks are enabled to you. Let's have a look on particular roles.

### 3.2.1. Administrator's role

As a member of the administrator group you are typically the system administrator. The system is enabled to have more than one administrator and you will understand shortly why.

The typical function of the system administrator is to maintain the system and to ensure that everything is working in a right order. In Support Tracker administrator means little bit more.

The administrator is the only one who is capable to:

- Create users in the system
- Update users records
- Remove user from the system
- Configure E-mail support engine
- Delete stored record(s)

The administrator is able also to do the following:

- Add a new error
- Search through the existing error records
- Update assigned error record
- Fix assigned error record
- Close assigned error record
- Reject assigned error record
- Forward assigned error
- Find similar errors in the knowledge base
- Export error records to a MS Excel file

The **Delete error record** is a very important functionality that is enabled to the administrator only. The administrator is the only one system's role that is providing erasing records from the database. Because of that there is possible to have more than one administrator for the system – just for example, the real system administrator will maintain whole Support Tracker, but the chief tester will need to remove non-actual error records from the database. So let's create a 'virtual administrator' and give the access permission to the chief tester.

Because of the security it is not possible to remove non-closed error records from the system.

### 3.2.2. Developer's role

As a member of the developer group you are typically responsible for software development or other stuff that is connected with creating of something. Typically, you are the person who will receive most enquiries through the system and the most of notification messages distributed by E-mail engine.

The typical function of the developer is to develop, to create and to analyse. However, you should be involved in more tasks than development tasks, but it would be always connected with the development. The system is designed to help you with tracking of existing errors and helping to find the best, sometime already existing, solution. However, you have no chance to see running tasks that are assigned to somebody else. Your communication through the system is usually limited to Tester / Support person. The developer is able to:

- Add a new error
- Search through the existing error records
- Fix assigned errors
- Reject assigned errors
- Find similar errors in the knowledge base
- Export error records to a MS Excel file

### 3.2.3. Tester's role

As a member of the tester group you are typically responsible for a quality software testing and error tracking. It's quite difficult to describe in here what should be an ideal role of Tester in the development process but we are sure that if you are a tester you know best what are you supposed to do. The system helps you to create error records and manage them, export them and update them. You can also track a history of records and see records that are assigned to the others users. Because you'll be preferably the creator of errors you have a power to control all flow of the error records through the system. Because you are supposed to create errors you will be the person who will do the final bug testing and error closing. Please remember that without records closing it is not possible to remove them from the database in the case of urgent need. Because of that the administrator of the system should frequently contact you to close errors that are supposed to be deleted. Please be sure with closing and rejecting records.

The tester is able to:

- Add a new error
- Search through the existing error records
- Update assigned error record
- Fix assigned error record
- Close assigned error record
- Reject assigned error record
- Forward assigned error
- Find similar errors in the knowledge base
- Export error records to a MS Excel file

### 3.2.4. Support's role

As a member of the support group you are typically responsible for a final implementation testing and installation. Your role is sometime means that you have to communicate with a customer too. Please note that you are the most important person from the company product of view. On your support quality depends the satisfaction of the customer. Because of that the system is designed to help you in your process as much as possible. You have a really big power to control the system flow. The main focus of the functionality of the system designed for your role was set up to easy-to-use error records tracking, assigning and solving. You are able to create new errors for all types of groups that existing in the system. It is very important to understand the system properly, mainly because of your role. When you find how to use Support Tracker you will find soon that it helps you a lot.

The supporter is able to:

- Add a new error
- Search through the existing error records
- Fix assigned error record
- Close assigned error record
- Reject assigned error record
- Forward assigned error
- Find similar errors in the knowledge base
- Export error records to a MS Excel file

## 4. User process flow

As you have seen there are four types of users. Between these types there exist a specific process flow that will be described in here.

Everybody knows that administrator is a person who is responsible for hardware and software stuff and who is the one who will be called when some problems occurs. In Support Tracker the administrator has the same meaning + something more. The administrator is also responsible for all things around Support Tracker, like system setup, account administration and database records administration. When you need to communicate with the administrator you don't need to write E-mail or call him – the best way is to assign an error to him (like request). Because the administrator is a full member of the system too he is enabled to solve the problems Support Tracker's way.

Developer is usually communicating with all group-types members, but mainly with a tester and with a supporter. He is usually asked to do something. Because of this the process flow is almost always going through the developer.

Tester is a source of error records. We should say that he is the most important member of the process flow because without proper testing there wouldn't be error records; that means that support would be without a knowledge base and the developer wouldn't have something to do. The tester is also responsible for a quality of the product so because of that he is the most important part of the process flow.

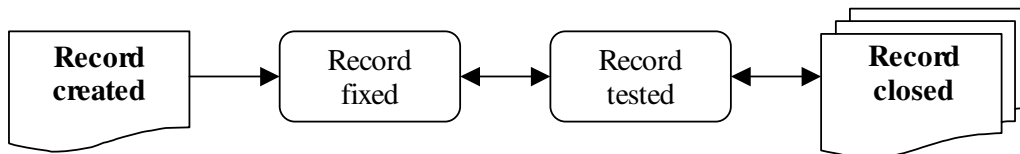
As we have said at the beginning of this chapter, supporter is a very important part of Support Tracker itself, but from the process flow view it is not as important as the tester or the developer. We should say that the supporter is mainly a passive member of the process flow because he is usually using the knowledge base to solve problems with a customer. But it shouldn't be always true! The active supporter should be the most important member of the process flow the same as the tester, because it should create error records for a development team and issues for testers. But we advise very tight communication between supporters and testers to prevent duplicate error records and inconsistency in a history. So, if you will be a passive or the active support member depends only on you but please pay attention to fully understand of your proper role; please don't forget that you are in a communication with the customer so you are representing the company.

## 5. Error process flow

The Support Tracker users are sharing so called error records process flow. This is a term used through Support Tracker to describe how records are flowing through the system and it is quite important to understand in it.

In a typical example of the error follow this happen:

- Tester creates an error record. The error is assigned to Developer.
- Developer checks the error and either fix it or reject it.
- If the error has been refused it is coming back to Tester and he must decide what to do next – reject the error and send it back to Developer or accept it and close it.
- If the error is fixed it is coming back to Tester and he must decide what to do next – reject the fixing or accept it and close the error record.
- When the error is coming back to Tester he can also update the error record or forward it to another user of the system.



From this example you can see that error record is flowing through the system from the time of creation until is closed.

The detailed process flow will be described in next parts of your guide, because all user roles are going through a specific flow process. Obviously, as the administrator of the system you have the highest user rights so because of that you will be involved in a whole process.

### **There are some error records process flow rules that are set:**

- 1. Error cannot be closed before is fixed.**
- 2. Error cannot be deleted until is closed.**
- 3. Error cannot be changed or updated by another user than is assigned to.**
- 4. It is not possible to enter no comment / description when error is created.**

## 6. User selection

In the following chapters there are described a specific users. After the preview you have to be clear what user role perfectly fits to you and which one is almost perfectly describes your professional assignment in the process in which Support Tracker is supposed to be involved.

Please continue with the chapter that best suits to you:

- For Administrator user role please continue through **Administrator user guide**
- For Developer user role please continue through **Developer user guide**
- For Tester user role please continue through **Tester user guide**
- For Supporter user role please continue through **Supporter user guide**

## 7. Support

If you need some additional information about the company products or you get confused with the description of some functionality described in here please contact the technical support of the company through our web site or through the E-mail:

Company web site: <http://www.compoundev.com/>  
Support E-mail: <mailto:support@compoundev.com>

When you contact the company because of the support please do not forget to include these information:

- Your customer registered name and ID
- Your system configuration
- The error description
- Both log files (server & client)
- Short description of your problem from your point of view

The company's support department will solve your problem as soon as possible and it will advise you the solution that will always fit your requirements.

With other enquiries please [contact the company](#).

We wish you to have a simple agenda with using of Support Tracker.