

Evaluator's Guide

Census v7.0

Getting Started

Logging On

Census supports integration with Windows NT and Active Directory domains, and can be set up to authenticate users using their Windows credentials. This means that users can skip the logon screen. However, during evaluation you most likely will have to log on using a Census account.

To log on to Census, you need a user account, which consists of a user name (sometimes called a logon name) and an optional password. Census includes several default user accounts that you can use to log on:

admin Has full administrative privileges.
Password = admin.

demo Has full administrative privileges. No password.

guest Has limited privileges. No password.

Jean Customer, Jean Manager, Jean Developer, Jean Tester Role-based accounts with different user permissions. Used to demonstrate the issue-tracking workflow of Census. No passwords.

To log on:

- 1 Start your Web browser and go to the Web view logon page (typically **http://server/Census**, where **server** is the computer name of your Web server).

To log on to the default Web views: on the **Start** menu, click **Programs > Census > Census Web**.

- 2 In the **Logon Name** box, type a user name.

- 3 In the **Password** box, type the password.

- 4 Click **Log On**.

After you log on, you will see a list of projects (in bold) and Web views (hyperlinks). Access to Web views is controlled by user permissions, so you see only the Web views you have permission to open.

- 5 Click the Web view you want to open.

What's a Project?

A Census project includes a database of issues, and a set of definitions (such as queries, reports, and notifications) that work with the issue database.

What's a Web View?

Census provides Web-based views of Census projects.

With Web views, you can provide separate views for external customers and for internal development staff. Each view is accessed through the same Web-based interface. Different views expose different queries and fields to users.

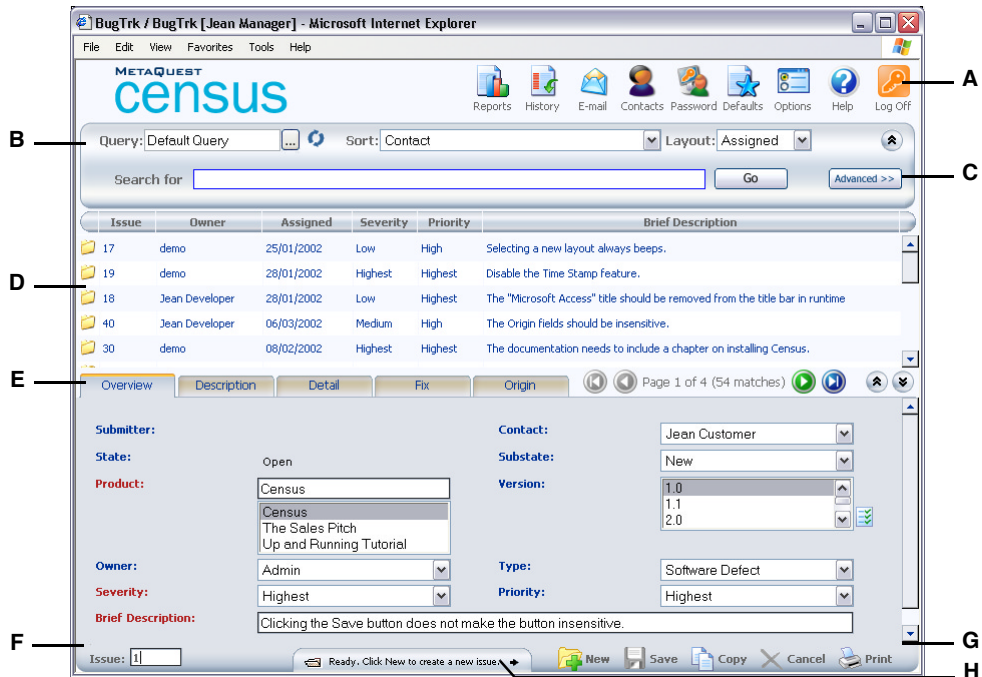
- Queries determine what issues users can retrieve from the project database.

For example, customers on a beta list don't need to see all the issues, just the issues submitted by the beta list.

- Fields determine what information users can see and edit.

For example, customers don't need to see any fix information added to the issues by the development staff.

Visual Tour of a Web View



A. The buttons in the view toolbar allow you to exit the Web view, get help, and set options. Depending on your user permissions, there may also be buttons for generating reports, reviewing the revision history of an issue, adding contacts, changing your password, setting default values, and sending e-mail.

B. Run predefined queries, sort the Summary List (see callout **D**), and change the layout (columns) of the **Summary List**.

C. The **Simple Search** bar allows you to quickly search issues for text. Click **Advanced** to build more complex ad-hoc queries.

D. The **Summary List** displays all the issues found by the current query. To load an issue, click any of the text on a row.

E. This tabbed form displays the details of an issue. Required fields are highlighted in dark red.

F. Shows the ID of the issue currently loaded into the form. To load an issue from the **Summary List**, type the number and press ENTER.

G. Create a new issue, save or cancel changes to the current issue, copy the current issue, and print the current issue.

H. Indicates the current status of the form (for example: editing, ready to create new, or loading data).

Click to refresh the Summary List.

Click to show more of the Summary List.

Click to show more of the issue details.

Click to page through the Summary List.

About the Default BugTrk Views


BugTrk Shows all issues and issue information, and is intended for use by development staff. Enforces workflow rules and defines an issue lifecycle.

Customer Shows only the issues and information submitted by customers. Internal notes and information added by qa and development staff is hidden. Allows customers to submit new issues and check the status of existing issues.

Exiting a Web View

Web views are applications, not simple Web pages. Exiting by closing the browser window can leave database connections open and will not free your license. The connection will eventually time out, but until then you (and other users) may not be able to log on.

To exit:

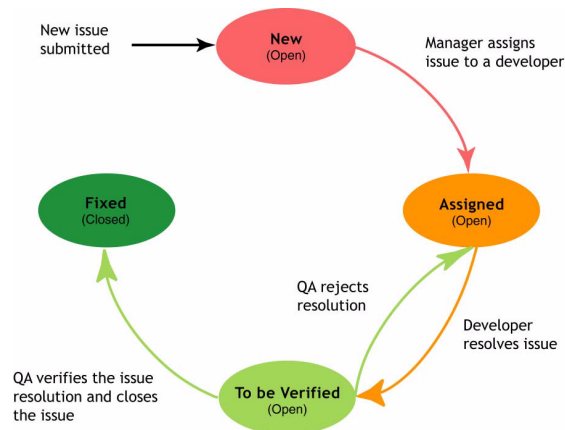
In the Web view toolbar (the buttons displayed at the top of a Web view), click **Log Off** .

Issue Tracking: Roles and Workflow

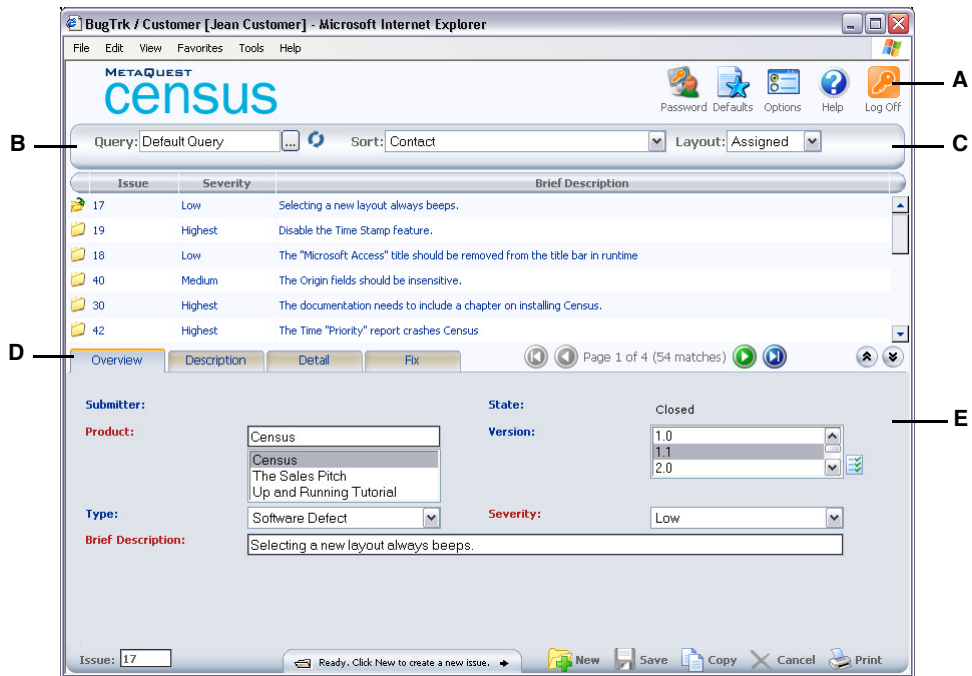
This section walks you through the workflow of recording, tracking, and resolving an issue. By logging on as a different user (customer, manager, developer, and qa tester) at each step of the process, you'll learn about the different role each user plays in the issue tracking workflow. You'll also see how different views are customized for different users, and how workflow rules are enforced.

You can customize the default workflow using the workflow editor in Census Web Admin.

Roles in a basic, four-step workflow



Customer View The Customer view is designed for reporting problems.



A. There are no **Reports**, **History**, or **Contact** buttons in the toolbar. Customers don't need these features to report problems.

B. The **Query** list includes only the default query (which returns all issues) and the query **My Found Issues** (which returns the issues reported by the user).

C. No ad-hoc query editor.

D. No **Origin** or **Version Control** tabs, because customers don't need the fields on those tabs to report issues.

E. No **Owner** field on the **Overview** tab, because customers don't assign issues. The **Fix** tab includes only the **Fixed in Version** and **Fixed on Platform** fields.

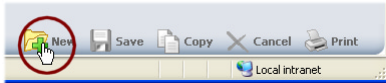
Step 1: Customer Reports a Problem

Log on to the Bugs - Customer View view:

- 1 Log on to Census as **Jean Customer**. Open the **Bugs - Customer View** view.
- 2 Take a minute to look over the Web view. You should notice a few differences from the view we looked at in “Visual Tour of a Web View” on page 5.

Report a problem:

- 1 Click **New**  to open a new issue.




- 2 Enter some information about the problem you want to report. For example, suppose you're having problems viewing a report.

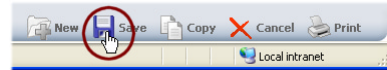
- a In the **Product** list, click **Census**.
- b In the **Severity** list, click **Highest**.
- c In the **Brief Description** box, type “Week to Date reports built with Crystal don't show a chart”.
- d Click the **Description** tab, and then in the **Description** box, type a more detailed description of the problem:

“When I view a Week to Date report in a Web view, the report header is displayed, but there the chart is NOT displayed in the body of the report.”

- 3 Click the **Substate** list. Note that it contains only one choice: **New**.


Customers are not allowed to change **Substate** from **New** to any other value. This is part of the default workflow, which controls how an issue progresses through the issue tracking process.

- 4 Click **Save** , and click **OK** when you are asked if want to save your changes.



When you save the issue, the text you typed in the **Description** box is automatically stamped with time and date information and moved to the **Description Log** box.

Description Log:	February 14, 2003 4:53 PM customer (N
	When I view a Week to Date report in a Web view, the repo
	displayed, but there the chart is NOT displayed in the bo
	report.

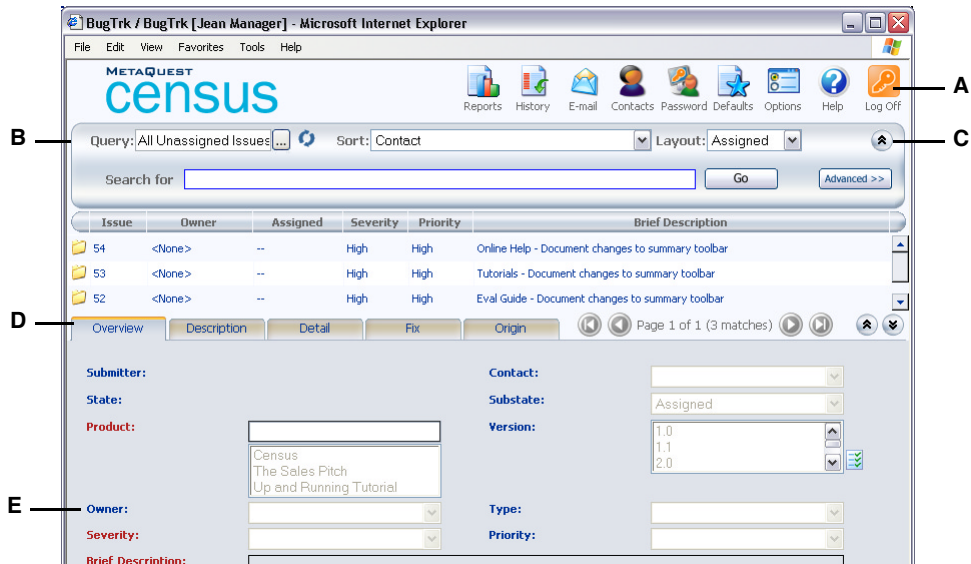
- 5 Click **Exit**  to exit the **Bugs - Customer View** view.

Step 2: Manager Assigns the Issue

Log on to the BugTrk view:

- 1 Log on to Census as **Jean Manager**. Open the **Bugs - Development** Web view.
- 2 Take a minute to look over the Web view. You should notice a few differences between this view and the [Bugs - Customer View view](#).

Development View The Development View is a detailed view designed for use by managers, developers, and qa staff.



A. The **Reports**, **History**, and **Contact** buttons are available.

B. The **Query** list includes a variety of queries.

C. The **Query Editor** is available.


D. The **Origin** tab is available. The **Fix** tab has a complete set of fields for recording fix information.

E. The **Owner** field is present on the **Overview** tab.

Check for new issues:

After you log on, you need to select the appropriate query, sort, and layout so the **Summary List** shows you the information you need (in this case, information about new, unassigned issues).

Each time you log on, Census restores the same query, sort, and layout you used the last time. So in practice, you don't always have to select a query, sort, and layout.

- 1 Beside the **Query** box, click . In the **Queries** dialog box, double-click **All Unassigned Issues** to list all issues where Owner = <None>.


You could also use the **All New Issues** query to list all issues with Substate = New.
- 2 In the **Sort** list, click **Severity and Priority** to sort the list so the highest severity issues are at the top.
- 3 In the **Layout** list, click **Standard**.

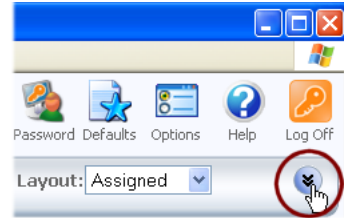
You should now see the "Week to Date reports built with Crystal don't show a chart" issue at the top of the **Summary List**.
- 4 In the **Summary List**, click the issue number of the "Week to Date reports built with Crystal don't show a chart" issue.

The issue details are loaded into the form at the bottom of the window.
- 5 Review the problem description (in the **Description Log** field).


Search for duplicate issues


Before assigning the issue to a developer, you can check if this problem was already logged.

- 1 Internet Explorer only: Click  to show the query editor.



- 2 Click **Advanced >>** to show the advanced query editor.

The simple query editor performs a text-based search of most fields. However, we want to build a slightly more complex query that searches only the Brief Description field.
- 3 In the **Field** list, click **Brief Description**.
- 4 In the **Test** list, click **Contains**.
- 5 In the **Value** list, type "report" (without the quotation marks).
- 6 Press **Enter** or click  to start the search.
- 7 If you don't see what you want in the search results, you can try expanding the search. In the **Retain Query** list, click **Or**.

Or combines the previous query (Brief Description contains "report") with a second ad-hoc query.
- 8 Create an ad-hoc query that searches for issues where the **Brief Description** field contains the string "Crystal".
- 9 Press **Enter** to start the search, or click .

The **Summary List** will list all issues that match this query:

```
(Brief Description Contains "report")
OR
```

(Brief Description Contains "Crystal")

Queries are case-insensitive, so you can search for either "report" or "Report".

Set the priority and assign the issue

Now that you know the issue is not a duplicate, you can set the priority and assign the issue to a developer.

You assign an issue by clicking a developer's name in the **Owner** list. After you set the owner, you mark the issue **Assigned** in the **Substate** list.


- 1 Return to the list of unassigned issues by running the **All Unassigned Issues** query.
- 2 Find the "Week to Date reports built with Crystal don't show a chart" issue and load it into the form.
- 3 In the **Priority** list, click **Highest**.
- 4 In the **Owner** list, click **dev**.
- 5 In the **Substate** list, click **Assigned**.

Note that the **Substate** list contains only **New**, and **Assigned**. A manager can change the **Substate** from **New** to **Assigned**, but not to any other value (for example, **Fixed**). This is part of the default workflow.

- 6 Click **Save**.

Note that now the **Substate** list contains only one choice: **Assigned**. Only a developer (or an administrator) can move an issue from the **Assigned** state.


Exit the view:

- Click **Exit**  to exit the **BugTrk** view.

Step 3: Developer Works on the Problem

While an issue is marked **Assigned**, it belongs to the assigned developer. When the developer fixes the issue, it is marked **To be Verified** so QA can verify the fix.

Log on and check for new issues assigned to you:

- 1 Log on to Census as **Jean Developer**. Open the **Bugs- Development** Web view.
- 2 Beside the **Query** box, click  and double-click **My Open Issues** to list the issues assigned to you that are marked **Assigned**.
- 3 In the **Sort** list, click **Priority** to list the new issues in ascending order by priority.

You should now see the "Week to Date reports built with Crystal don't show a chart" issue at the top of the **Summary List**.

- 4 In the **Layout** list, click **Description**.

Fix the issue

Suppose all it takes to fix the issue is to modify the report to display a message like "No issues submitted during the last week" when there is no data to chart.


- 1 In the **Summary List**, click the issue number of the "Week to Date reports built with Crystal don't show a chart" issue.
- 2 In the **Substate** list, click **To be Verified**.

Note that the **Substate** list contains only **Assigned** and **To be Verified**. In the default workflow, an **Assigned** issue cannot move directly to **Fixed** without first being marked **To be Verified**.

- 3 Click the **Fix** tab, and in the **Fix Information** box, type a summary of how the issue was fixed:

“Crystal reports don’t show charts if there is no data to chart. Updated all reports based on time periods to show a message if there is no data.”


Click **Save**  to save the issue.

- 4 In the **Fixed By** list, click **dev**.
- 5 In the **Fixed In Version** list, click **5.0**.
- 6 In the **Fixed On Platform** list, select one or more platforms.
- 7 Click **Save** to save the issue.
- 8 Click **Exit**  to exit the Web view.

Step 4: QA Verifies the Fix and Closes the Issue

After a developer fixes an issue, QA must verify the fix. After QA verifies the fix, the QA person closes the issue by marking it **Fixed**.

Verify the fix and close the issue

- 1 Log on as **Jean Tester** and Open the **Bugs - Development** Web view.
- 2 Beside the **Query** box, click  and double-click **All Issues To be Verified** to list the issues marked **To be Verified**.
- 3 In the **Summary List**, click the issue number of the “Cannot use multichoice lists to build charts in Crystal.” issue.
- 4 In the **Substate** list, click **Fixed**.

Note that if you do not accept the fix, you can move the issue back to **Assigned**.

More About Working with Issues





Finding and Listing Issues

You use the **Query** box and the **Sort** and **Layout** lists to generate and format lists of issues in the **Summary List**.



A layout is the set of columns displayed in the Summary List.

The **Summary List** displays the results of a query as pages. For example, each page may contain 15 results (the actual number of results per page is set by your Census administrator).

To browse the Summary List:

- Click  to move back one page.
- Click  to move forward one page.
- Click  to go to the first page.
- Click  to go to the last page.

To change the size of the Summary List:

- Click  and  to increase and decrease the number of visible issues.

-or-

- Click **Options** and change the height of the Summary List.

To print the Summary List:

- You can use the **Summary List** to generate reports. See “Generating Reports from the Summary List” on page 22.


To refresh the Summary List

- Click .


Running Global and Saved Queries

The Query box on the Summary toolbar allows you to run global queries and personal saved queries.

To run a global or saved query:

- 1 Click  beside the **Query** box.
- 2 In the **Queries** dialog box, double-click the query that you want to run.

Global Queries are the predefined queries available to all Census users. My Queries are the queries you defined and saved while working in Census.

Tip To see the definition of a query, click the query and then click .

Performing Simple Searches

By default, Census displays a Simple search form (a **Search For** text box with a **Go** button).

The Simple query editor allows you search the Summary List for issues that contain a specific string. For example, type "incomplete" in the **Search for** box and click **Go** to search the **Summary List** for issues that contain the string "incomplete".

Simple search searches:

- Text fields, such as Brief Description and Description Log.


- Choice lists, such as Severity and Substate.
- Number fields.

Building Advanced Queries


You use the Advanced query editor to build more complex queries that use wildcards and multiple search conditions.


Predefined queries find broad categories of issues, such as all open issues or all assigned issues. Often you need to find issues based on more specific criteria. For example, you may want to search the **Brief Description** or **Description** fields for keywords. Or you may want to search for all issues submitted during a specific period of time.

To define an advanced query:

- 1 Internet Explorer only: In the **Summary Toolbar**, click .
- 2 Click **Advanced >>**.
- 3 In the **Field** list, click the issue field you want to search against.
- 4 In the **Test** list, click a query operator.
- 5 In the **Value** field, enter the value you want to search against.

Notes

- To save a query so you can use it again, click .
- If you type a search string in the Value box, press ENTER to start the search. When you choose a value from the Value list, the search starts automatically, but when you type the search string directly in the Value box, you must press ENTER.

- When you change the test in an ad-hoc query, you must click  to run the new ad-hoc query.
- Text searches are case insensitive.

Combining Ad-hoc Queries

The **Retain Query** list allows you to combine an ad-hoc query with the previous query (which can be a predefined query from the **Query** list or another ad-hoc query). Use **And** to narrow the search and restrict the list of issues. Use **Or** to broaden the search and expand the list. Use **No** when you want to search the entire database of issues.

For example, **And** allows you to search the **Summary List**.

To search the issues in the Summary List:

- 1 In the **Query** list, click a query.
- 2 In the **Retain Query** list of the **Ad-hoc Query Editor**, click **And**. This combines the ad-hoc query with the current predefined query.
- 3 Run an ad-hoc query.

Searching for Dates

To search against dates, use the date format used by Census to display dates such as **Submitted Date**. For example, to find all issues submitted since October 2004, use this ad-hoc query:

```
Submitted Date >= 10/1/2004
```


Using the Contains, Like, and Not Like Operators

Contains matches any part of a field, while **Like** and **Not Like** match the entire contents of a field. For example, the query

`Brief Description Contains "keyword"`
matches any issue that contains the string "keyword" anywhere in the **Brief Description** field.

The query

`Contact Company Name Like ACME`
finds issues reported by customers from ACME, but not from ACME Inc. Because **Like** applies to the entire field, it is typically used with wildcards. For example, the query

`Contact Company Name Like ACME%`
finds all issues submitted by customers whose company name starts with ACME (such as "ACME", "ACME Software", and "ACME Inc").

Not Like is also useful when combined with wildcards. For example, the query

`Severity Not Like "Low%"`
finds all issues with severity set to Highest, High, or Medium (not Low or Lowest). Note that this example shows that you can use **Contains**, **Like**, and **Not Like** to search choice lists as well as text fields.

Searching with Wildcards

The **Like**, **Not Like**, and **Contains** operators support wildcard characters, which gives you considerable flexibility in the specification of search patterns. Using wildcards, you can search for inexact patterns of text in any field.

Wildcard	Matches
–	Any single character.
%	Zero or more characters. For example: " Contains fr%ze" matches any string that contains "freeze" or "froze" "Like Install%" matches any string that starts with "Install"
[charlist]	Any single character in charlist. Can include spaces, but not the right bracket (]) character. For example: "SP[56]" matches "SP5" or "SP6" Use a hyphen to specify a range of characters. For example: "[1-36-9]" matches the digits 1, 2, 3, 6, 7, 8, or 9 To match the hyphen character, the hyphen must be either the first or last character in charlist. For example: "[-0-9]" or "[0-9-]" match any digit or a minus sign
[^charlist]	Any single character not in charlist. For example: "[^tb]rash" matches "crash" but not "trash" or "brash"



To search for the wildcard characters % and _, you must enclose them in brackets. For example, to search for a percent sign, use the pattern "[%]".

To search for character ranges in numeric fields (such as Issue and Revision Number), type quotation marks around the character range. For example, type "1[6-9]" to find issues 16, 17, 18, and 19.

Printing the Summary List

You can use reports (Listing or Custom) to print the contents of the Summary List. For example, you can use ad-hoc queries to find all issues submitted during the given time period, and then print a list of these issues.

To print the Summary List:

- 1 Click **Reports** .
- 2 In the **Reports** dialog box, click a report in the **Report Name** list.
- 3 Internet Explorer only: click .
- 4 Click **Issues in the Summary List**.
- 5 Click **View**.
- 6 On the **File** menu of the browser, click **Print**.

Viewing Issues



The **Summary List** displays a summary of each issue. To view the full details of an issue, you select it from the list.

To view issue details:



- In the **Summary List**, click the issue number or the folder icon.
- or -
- Type an issue number in the **Issue** box and press ENTER.

Submitting Issues

To submit a new issue:

- 1 Click **New**  to open a new issue.
- 2 Enter all available information about the issue.
- 3 Click **Save**  to save the new issue.


Tips

- To save time, you can create a new issue by copying an existing issue. Just load the issue and then click **Copy** .
- If you do not fill in all the required fields, Census prompts you to fill in the missing information.
- If you decide not to submit an issue, click **Cancel**  to discard the issue.

Attaching Files to Issues

If you have notes, pictures, and other files that document an issue, you can attach them to the issue.

To attach an ASCII or binary file:

- 1 Beside the **Attachments** field, click .
- 2 In the **Attachments** dialog, click **Browse** and locate the file you want to attach.

- 3 Click **Upload File** to copy the file to the server. Click **Link File** to add a link to the file on your local computer.

Use attachments instead of entering large amounts of text (over 100,000 characters) into memo fields such as the Description field. If you want to be able to search against the text, you can put a summary or some keywords in the Description field.

Linking Child Issues to a Parent Issue

Census allows you to link one or more child issues to a parent issue. For example, if you have several bugs that are all symptoms of the same problem, you can make those bugs the children of the main, parent bug for the problem. Or if a task consists of a number of sub-tasks, the sub-task issues can be children of the main task.

By default, the parent issue controls the substate of the child issues. For example, when you change the substate of the parent to Fixed, all the children are also marked Fixed. If you want the substate of a child issue to be independent from the substate of the parent issue, load the child issue and on the **Overview** tab, change **Substate controlled by parent** to **No**.

To add child issues to a parent issue:

- 1 Make a note of the issue numbers of the child issues.
- 2 Load the parent issue.
- 3 Click the **Child Issues** tab. For each child issue, click **Add**, type the issue number of the child, and click **OK**.


Notes

- To view a child issue, click the issue number, owner, substate, or brief description of the issue. This displays information about the child issue in a separate window.
- To edit a child issue, select the issue (click in a blank area of the row) and then click **Load**.
- To remove a child issue, select the issue (click in a blank area of the row) and then click **Remove**.
- You can find the parent issues of a child issue by searching against the **Child Issues** field. For example, to find the parent issues of the issue 22, use the Advanced query editor to search for **Child Issues = 22**.
- To find all parent issues, use the Advanced query editor to search for **Child Issues <> 0**

Viewing an Issue's Revision History

Census maintains a revision history for each issue. The revision history is a list of all changes made to the issue after it was first submitted. Each time you save an issue, Census records the changes you made in the revision history.

To open the Revision History for an issue:



- 1 In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
- 2 In the Web view toolbar, click **History**. 

The revision number (Revision column in the Revision History column) increases by one each time the issue is saved. The first revision, which is not shown, is the initial submission of the issue.

Updating Issues

A typical issue is constantly updated during its lifetime, as managers, developers, QA, support staff, and technical writers all track and follow up on the issue. Depending on your role in the company, you may update an issue by changing its status, assigning it to a developer, adding notes, or adding fix information when the issue is closed.

To update an issue:


- 1 In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
- 2 Edit the issue information.
- 3 Click **Save**  to save your changes, or **Cancel**  to discard your changes.

Setting the Default Values for New Issues

To help save time when submitting new issues, you can set your own personal default values for new issues.


To set the default values for a Web view:

- 1 Log on to the Web view.


- 2 In the Web view toolbar, click **Defaults** .
- 3 In the **Default Values** dialog box, set the field values you want to use as defaults for new issues.
- 4 Click **Apply**.

Printing Issues

To print an issue:

- 1 In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
- 2 Click **Print**  to generate a detailed report for the current issue.
- 3 On the **File** menu of the browser, click **Print**.

To print an issue using a different report:

- 1 In the **Summary List**, click an issue number, or type an issue number in the **Issue** box and press **Enter**.
- 2 Click **Reports** .
- 3 In the **Reports** dialog box, click a report in the **Report Name** list.
- 4 Internet Explorer only: click .
- 5 Click **The current issue**.
- 6 Click **View** to generate and view the report.
- 7 On the **File** menu of the browser, click **Print**.

Reporting

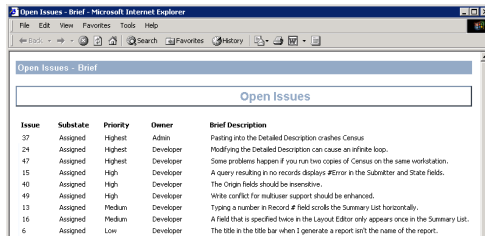
Census provides Web-based reporting to help you manage your projects. Census uses HTML to display Listing reports, and Crystal Reports to display custom reports.

Census includes the Crystal Reports v9.0 Runtime Software, which is used to display custom reports.

Listing Reports

Listing reports extract and present subsets of the information entered in the issues.

Sample HTML Listing Report

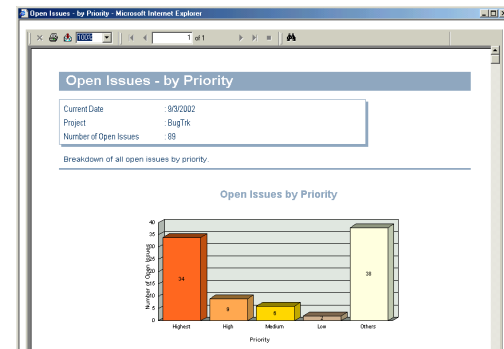


Issue	Substate	Priority	Owner	Brief Description
37	Assigned	Highest	Admin	Pasting into the Detailed Description crashes Census.
24	Assigned	Highest	Developer	Modifying the Detailed Description can cause an infinite loop.
47	Assigned	Highest	Developer	Some problems happen if you run two copies of Census on the same workstation.
15	Assigned	High	Developer	A query resulting in no records displays #Error in the Submitter and State fields.
40	Assigned	High	Developer	The Origin fields should be interactive.
49	Assigned	High	Developer	White conflict for multuser support should be enhanced.
13	Assigned	Medium	Developer	Typing a number in Record # field scrolls the Summary List horizontally.
16	Assigned	Medium	Developer	A field that is specified twice in the Layout Editor only appears once in the Summary List.
6	Assigned	Low	Developer	The title in the title bar when I generate a report isn't the name of the report.

Custom Reports


Custom reports are customized listing reports that present data in graphic formats such as pie charts and bar charts. Custom reports are built with Crystal Reports, so you can add features such as charts, formulas, field highlighting, and running totals to a listing report. You can also import graphics (such as company logos) and completely reformat a listing report.

Sample Custom Report




Viewing Reports

To view reports:

- 1 Click **Reports** .
- 2 Click the **Listing** tab or the **Custom** tab.
- 3 Click the report you want to report view, and then click the **View** button.

To view reports in landscape mode:

You can view custom reports in landscape mode (landscape mode requires the Crystal Reports viewer).



- 1 Internet Explorer only: in the **Report Viewer**, click .
- 2 In the **Layout** list, click **Landscape**.

Printing Reports

To print HTML reports:

- In the **File** menu of the browser, click **Print**.



To print reports from the Crystal Reports viewer:

- In the toolbar of the Crystal Reports viewer, click  to print the issue. Click  to save the report as PDF, Word, or Excel.

Generating Reports from the Summary List

You can use reports (Listing or Custom) to print the contents of the Summary List. For example, you can use ad-hoc queries to find all issues submitted during the given time period, and then print a list of these issues.


To generate reports from the Summary List:

- 1 Use predefined and ad-hoc queries to list the issues you want to include in the report.
- 2 Click **Reports** .
- 3 In the **Reports** dialog box, click a report in the **Report Name** list.
- 4 Click  and then click **Issues in the Summary List**.
- 5 Click **View** to generate and view the report.

Viewing Crystal Reports

With Crystal Reports, you can use either ActiveX or a Java report viewer. The ActiveX report viewer works only on Internet Explorer. By default, Census detects your browser type and sets the viewer type for you.

To change the report viewer:

- 1 Internet Explorer only: in the **Report Viewer**, click .
- 2 In the **Viewer Type** list, click the viewer you want to use.



Contacts, Passwords, and Options

Adding and Editing Contacts



A contact is a person who does not have a Census user account, but who reports issues. For example, many defects are reported by customers, who are not Census users.

When you submit an issue, you select a contact from the **Contact** list. By default, the **Contact** list includes the name of all Census users. To add other names to this list, you use the **Contact** command.

To add a contact:

- 1 In the Web view toolbar, click **Contacts** .
- 2 Click .
- 3 Enter the contact information and click **Apply**.


To edit a contact:

- 1 In the Web view toolbar, click **Contacts** .
- 2 In the **Display** list:
 - To list all contacts, click **Contacts**.
 - To list only the names starting with a certain letter or string, click **Names starting with**, type the letter or string, and press ENTER.
 - To list only the names containing a certain string, click **Names containing**, type the string, and press ENTER.
- 3 In the list of contacts, click a contact and then click .
- 4 Edit the user information and then click **Apply**. Click **Cancel** to cancel the changes.

Disabling a contact has no effect.

Changing your Password


To change your password:

- 1 In the Web view toolbar, click **Password** .
- 2 In the **Old Password** box, type your current password.
- 3 In the **Password** box, type your new password.
- 4 In the **Confirm Password** box, type your new password again.
- 5 Click **OK**. Click **Clear** to clear all text boxes, or click **Cancel** to exit without changing your password.

If you forget your password, ask your Census administrator to reset your password.

Setting Options

To set the heights of the Summary List and the issue details:


- 1 In the Web view toolbar, click **Options** .
- 2 Enter a percentage value for either the **Summary List** or the **Details** (the form that displays the issue fields). The other value is automatically calculated.

The percentages indicate the amount of vertical space used by the **Summary List** and the issue.

The percentages add up to 100% and divide the available vertical space between the list and the form (a certain amount of vertical space is reserved for the other elements of the Web view).

To set the default query editor:

By default, Census displays the Simple search form when users log on. You can change this so Census displays the Advanced query editor by default.

- 1 In the Web view toolbar, click **Options** .
- 2 Under **Ad-hoc Query Editor**, click **Advanced Search**.

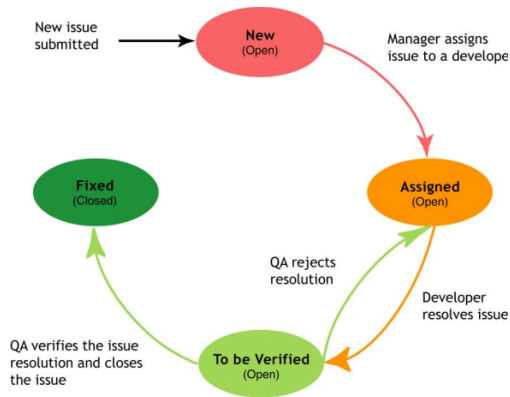
Chapter 7: About the Census Projects

BugTrk

BugTrk allows you to record and track development issues, such as defects, feature and enhancement requests, user suggestions, and change notices.

BugTrk is shared by customers, developers, QA staff, project managers, and anyone else involved in the life of the product. As new issues are submitted into the system, managers assign them to the appropriate developers. Once an issue is fixed, it is sent to QA for verification. The issue is then either closed or returned to the developer.

BugTrk Workflow



BlankProject

BlankProject includes the absolute minimum: a handful of fields, one query, one sort, one layout, and no reports or notifications. If you don't need most of the fields defined in one of the other projects, you may want to consider using BlankProject as your base project.

Requirements

The Requirements project helps in the painstaking task of gathering, documenting, editing, and communicating project requirements (functional, technical, and other).

The Requirements Web view includes pop-up help that describes the purpose of each field.

Test Suite

Designed for use by QA staff, TestSuite allows you to record and track test cases.

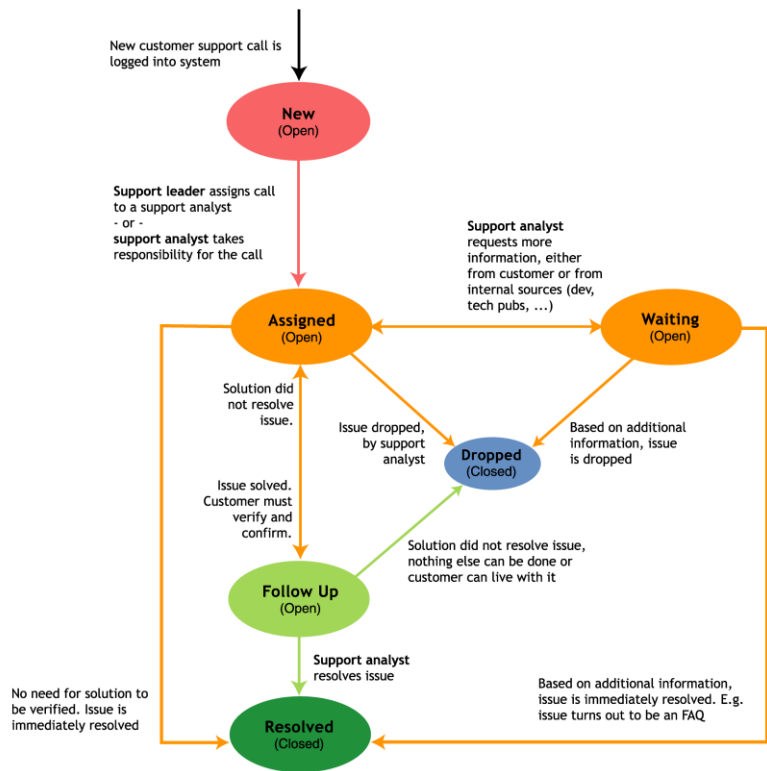
Timesheet

Timesheet allows you to record and track weekly timesheets. You can track employee time by project, holidays, vacation, and sick days.

XSupport

XSupport allows you to record and track support calls from external customers. Front-line support analysts log new calls into the system, where support group leaders assign them to the appropriate support analysts. Analysts investigate, communicate resolutions to customers, follow up to verify that problems were solved to the customer's satisfaction, and finally, close the calls in the tracking system.

Support call workflow



XSupportBugTrk

XSupportBugTrk combines customer support (XSupport) and defect tracking (BugTrk). Using XSupportBugTrk, you can:

- Record and track support calls from external customers.
- Record and track development issues such as defects, tasks, and feature requests.
- Convert closed support calls into development issues without having to log a separate issue into the database. All you have to do is change the **Type** field (for example, from Support Call to Software Defect).

Support calls and development issues are stored in the same database, using the same set of fields. Some fields, such as **Summary**, **Product**, **Version**, **Severity**, **Priority**, **Type**, **Problem Area**, and **Description**, are shared by calls and issues.

Other fields, such as **Owner**, **State**, **Substate**, **Assigned Date/Time**, and **Closed Date/Time**, are duplicated so that information can be tracked separately for calls and issues. For example, two **Substate** fields are required so that separate workflows can be provided for tracking support calls and for tracking development issues.

Separate Web views are provided for customer support staff and for development staff. Each view exposes the relevant fields for either call tracking or bug tracking.

How a support call becomes a development issue

