Census User’s Guide

Using Web Views

A Web view is a Web-based application for tracking and managing issues (such as bugs and feature requests). Web views allow developers, testers, vendors, and customers to view the status of existing issues, submit new issues, and edit existing issues from around the world.

Each Census project can have multiple Web views. For example, customers on a beta list don't need to see all the issues in a project, just the ones submitted by the beta list. And customers don't need to see any fix-related information added to the issues by the developement staff. Internal development staff, on the other hand, needs access to all the issue information in the project.

Your Web views may not look like the ones shown in this documentation. The Web view user interface is customizable, and access to Web view features is controlled by user group permissions.

Running Web Views

All Web views require you to log on with your user name and password. If you don't have a user name and password yet, ask your Census administrator.

Logging On

To log on:

1. Start your Web browser and go to the Web view logon page. If you don't know where the logon page is located, ask your Census administrator for the link.
2. In the **Logon Name** box, type your user name.
3. In the **Password** box, type your password.
4. Click **Logon** to display a list of the available Web views.
5. Click a Project / View to open the Web view.

To log on to another Web view, you must exit and log on again. Depending on how your Census administrator set up the views, you may have to go to a different logon page.

Don't know where to find the log-on page?

Ask your Census administrator for the URL of the log-on page for the Project / View you want to work with.

Want to change your password? Your default password (if any) is assigned by the person responsible for administering Census. To change your password, click the **Password** button (if you have access to the Password feature, the button appears at the top of the Web view page). If you don't see this button, ask your Census administrator to change your password.

Forgot your password? Ask your Census administrator to clear your password and define a new password.

Exiting

Web views are applications, not simple Web pages. Exiting a Web view by closing the browser window can leave the database connections open. This means that your Census license will not be freed until the connection times out.

Until the license is freed, you (and other users) may not be able to log on.

To exit:

- In the Web view toolbar (top of the page), click the **Exit** button.

It is highly recommended that you use the **Exit** button to exit Web views.

Web Views At a Glance

Web View Toolbar Allows you to set options, get help, and exit the Web view. Depending on your user group permissions, there may also be buttons for generating reports, reviewing the revision history of the current record, adding contacts, and changing passwords.

Web View Toolbar

Summary Toolbar The **Query**, **Sort**, and **Layout** drop-down lists allow you to run predefined queries, sort the **Summary List**, and change the layout (columns) of the **Summary List**.

Summary Toolbar

Ad-hoc Query Editor Allows you to create ad-hoc queries. For example, you use ad-hoc queries to search for keywords.

Ad-hoc Query Editor

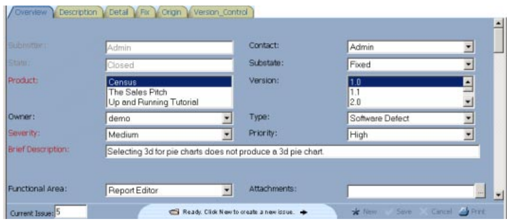
Summary List Displays all the issues found by the current query. The records are sorted based on the selected sort, and the columns of the summary list are defined by the selected layout.

Click the issue number or the folder icon to view the issue details.

Summary List

Issue Displays the details of the selected issue. The number of the selected issue is displayed in the Current Issue box. The tabs (Overview, Description, Detail, Fix, and Origin) allow you to switch between the different tabs defined in the Census project.

Issue



Working with Issues

The bottom section of a Web view allows you to enter, view, and update the details of individual issues.

Product:	This color indicates a required field.
State:	This color indicates a field that is automatically calculated or filled in.

Current Issue	Shows the number of the issue selected from the Summary List. To load a specific issue from the Summary List, type the number and press Enter. For example, if the current query is All Open Issues, you must enter the number of an open issue.
New	Opens a new issue.
Save	Saves changes to the current issue.
Cancel	Cancels changes made to the current issue since the last time it was saved.
Print	Prints the current issue. Also allows you to export the issue in a variety of formats, such as Crystal Reports (*.rpt), Microsoft Word (*.doc), Microsoft Excel (*.xls), Rich Text Format (*.rtf), or Adobe Acrobat (*.pdf).

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 **Current 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.

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.

Viewing an Issue's Revision History

Census maintains a revision history for each issue. The revision kistory 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 **Current 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 **Current Issue** box and press **Enter**.
2. Edit the issue information.
3. Click **Save** to save your changes, or **Cancel** to discard your changes.

Printing Issues

To print an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Current Issue** box and press **Enter**.
2. Click Print.
3. Click to print the issue. Click to export the issue.

To print the Summary List

1. Click any of the issues in the **Summary List**.
2. In the **File** menu of the browser, click **Print**.

Exporting Issues

To export an issue:

1. In the **Summary List**, click an issue number, or type an issue number in the **Current Issue** box and press **Enter**.
2. Click the Print button.
3. Click to save the issue as either Crystal Reports (*.rpt), Microsoft Word (*.doc), Microsoft Excel (*.xls), Rich Text Format (*.rtf), or Adobe Acrobat (*.pdf).

Linking Issues to Version Control

In a Web view, the **Version Control** tab allows you to associate an issue with any source object under version control. Since all project-related issues (bugs, issues, feature requests, suggestions, ...) are stored in a Census project, linking issues to version control brings together everything about an issue in one place.

For example, when a developer initially investigates a bug, the developer can link the related source files (the files containing the code that needs to be fixed) to the bug report. This is especially important if the bug fix is deferred until later.

When the developer actually starts fixing the bug, all the developer has to do is open the bug report in a Web view, and from there check out the files that need to be changed. Once the code is fixed, the files can be checked back in via the Web viewand the issue marked as **Fixed**.

At this point, Census documents what code was changed to fix the bug. QA can use this link between the bug and the changed code to determine what needs to be retested.

To link an issue to source files under version control:

1 In the Web view, click the **Version Control** tab.

2 Click **Add** .

3 In the **Version Control Browser**, select the source files you want to link with the issue and click Add.

To check out a file:

1 Click the file you want to check out.

2 Click **Check Out**.

3 Enter your working folder in the **To folder** box
- or -
Select the **Don't get local copy** check box if you don't want a copy of the file put in your working folder.

4 In the **Comment** box, type a brief description of the reason for the check out.

5 Click **Ok**. Click **Close** to exit the dialog without checking out the file.

To check in a file:

1 Click the file you want to check in.

2 Click **Check In**.

3 Type the location of the file in the **From** box.

4 In the **Comment** box, type a brief description of changes.

5 Select the **Keep checked out** check box if you want to update the master copy of the file but keep the file checked out.

6 Click **Ok**. Click **Close** to exit the dialog without checking in the file.

To undo a check out:

1 Click the file you want.

2 Click **Other** and then click **Undo Check Out**.

Undoing a check out through a Web view does not overwrite your local version of the file with the most recent version in VSS.

To get the most recent version of a file

1 Click the file you want to get.

2 Click **Get Latest**.

3 Enter your working folder in the **To folder** box.

4 Select the **Writable** check box to get a writable copy of the file.

5 Click **Ok** to get the file. Click **Close** to exit the dialog without getting the file.

To get an earlier version of a file:

1 Click the file you want to get.

2 Click **Other** and then click **History**.

3 In the **Version Control History** dialog, select the version of the file you want a copy of.

4 Click **Get**.

5 Enter your working folder in the **To folder** box.

6 Select the **Writable** check box to get a writable copy of the file.

7 Click **Ok** to get the file. Click **Close** to exit the dialog without getting the file.

To view file properties

1 Click the file whose properties you want to view.

2 Click **Other** and then click **Properties**.

Finding and Listing Issues

You use the **Summary Toolbar** to generate and format lists of issues in the **Summary List**. In the **Summary Toolbar**, the **Query**, **Sort**, and **Layout** lists provide quick access to predefined queries, sorts, and layouts.

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 run a predefined query:

- In the **Query** list, click a query.

To sort the Summary List:

- In the **Sort** list, click a sort.

To change the layout of the Summary List:

- In the **Layout** list, click a layout.

  Each layout displays a different set of columns.

To browse the Summary List:

- Click  to move back one page.
- Click  to move forward one page.
- Click  to go 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.

To print the Summary List:

- Click an issue in the **Summary List**. In the **File** menu of the browser, click **Print**.

To refresh the Summary List

- Click the  button.

Building Ad-hoc Queries

You use the Ad-hoc Query Editor to build queries that test the value of a single field. For example, you use ad-hoc queries to search for keywords in the Brief Description field. You can combine multiple ad-hoc queries with And or Or. You can also use And or Or to combine a predefined query with an ad-hoc query.

To define an ad-hoc query:

1 In the **Summary List**, click **Show**.

  Access to the Ad-hoc Query Editor is controlled by user group permissions.

2 In the **Field** list, click the issue field you want to search against.

3 In the **Test** list, click a query operator.

4 In the **Value** field, enter the value you want to search against.

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 Refresh to run the new ad-hoc query.

Text searches are case insensitive.

Combining Ad-hoc Queries The **Retain Query** list allows you to combines 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.

Searching for Dates To search against dates, use the same date format as used by Census to display dates such as **Assigned Date**. For example, to find all issues submitted in March 2002, use this ad-hoc query:

```
Submitted Date >= 3/1/2002
```

Searching for Keywords

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.

To search for keywords in a text field:

1. In the **Summary Toolbar**, click **Show** to show the **Ad-hoc Query Editor**.

   If you do not see a **Show** button, then the **Ad-hoc Query Editor** is not available (because your user group permissions do not include this feature). You can still search the **Summary List** to check if the issue already exists.

2. In the **Field** list, select a text field (such as the **Brief Description** field).
3. In the **Test** list, select **Contains** to search for keywords.
4. In the **Value** box, type the keyword. The search is case-insensitive (for example, you can type "Query Ed" or "query ed").
5. Press **Enter** to start the search.

To extend the search to include another text field, select **And** from the **Retain Query** list. Then repeat the above steps to define a query that searches for the same keywords in the second text field.

Another approach to keyword searches is to get a list of issues in the **Summary List**, and then search through those issues for the keywords. The difference is that instead of searching all issues for the keywords, you search only the issues in the **Summary List**.

For example, you can run a query to retrieve a list of all open issues, and then search the **Summary List** for the keywords "query ed".

To search the issues in the Summary List:

1. In the **Query** list, click a query.
2. Click **Show** to show the **Ad-hoc Query Editor**.
3. In the **Retain Query** list, click **And**.
4. Run an ad-hoc query.

   The ad-hoc query is combined with the predefined query.

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
*	Zero or more characters. For example: "*rash*" matches "crash" or "rash"
#	Any single digit (0, 1, 2, 3, 4, 5, 6, 7, 8, or 9). For example: "##MB" matches "16MB" or "12MB" but not "8MB"
[charlist]	Any single character in charlist. Can include spaces, but not the right bracket (]) character. For example: "[34]86" matches "386" or "486"
	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 an asterisk, use the pattern "[*]".*

Generating Reports

Reports help you understand and assess the state of your project. A issue tracking system like Census contains a lot of valuable information about the state of a project . Reports allow you to access this information, break it down and analyze it, and present it.

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

Custom reports are customized listing reports that present data in graphic formats such as pie charts and bar charts.

To view and print reports:

1 Click the **Reports** button.

2 Click the **Listing** tab or the **Custom** tab.

3 Click the report you want to view, and then click the **View** button.

4 Click  to print the report. Click  to save the report.

To view or print landscape reports:

1 In the **Report Viewer**, click **Show**.

2 In the **Layout** list, click **Landscape**.

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 **Add** and then click **Contact**.

3 Enter the contact information and click **Apply**.

To edit a contact:

1 In the Web view toolbar, click **Contacts**.

2 In the list of contacts, click a contact and then click **Edit**.

3 Edit the user information and then click **Apply**. Click **Cancel** to cancel the changes.

Disabling a contact has no effect.

Setting Options

To set the heights of the Summary List and Issue:

1 In the Web view toolbar, click **Options**.

2 Enter a percentage value for either the **Summary List** or the **Issue (Details)**. 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%, but this does not mean that the **Summary List** and issue take up the entire browser window. The percentages divide the available vertical space between the **Summary List** and the issue (a certain amount of vertical space is reserved for the other elements of the Web view).

Sending Change Notifications

When you submit or update issues, Census can notify other team members of your changes by sending e-mail messages. These messages are known as notifications.

The type of events that can trigger notifications include:

- Reassigning an issue.
- Opening a high priority issue.
- Changing the state of an issue (for example, to **Assigned** or to **Fixed**).

The actual events that trigger notifications are determined by your Census administrator.