Project Issue Tracking System (PITS)

Tutorial

Last Updated:

July 2, 2004
Chip Smith
Titan Corporation

Table of Contents

1.0 Introduction 1
2.0 Logging into PITS 1
2.1 Changing Projects 1
3.0 The PITS Home Page 2
3.1 Navigation Menu 2
3.2 User Information 3
4.0 Technical Issue Memorandums (TIMs) 3
4.1 Creating a new TIM 4
4.2 Saving Defaults 4
4.3 Using Defaults 5
4.4 Opening an existing TIM 5
4.5 Updating an existing TIM 5
4.6 Adding Relationships 6
4.7 Adding Textual Relationships 7
4.8 Adding TIM Relationships 7
4.9 Adding Attachment Relationships 9
4.10 Creating/Editing Resolution Chronologies 9
4.11 Rollback a TIM 10
4.12 Creating a copy of a TIM (Save As) 11
4.13 Editing Multiple TIMs 12
4.14 Spell Checker 12
5.0 Querying the Database 13
5.1 Build a Query on a Date Range 14
5.2 Build a Query on a Text String 14
5.3 Build a Query for a Select List Value 15
5.4 Order a Query by a Returned Field 15
5.5 Executing a query 15
5.6 Loading a Previous Query 16
5.7 Saving Queries 17
5.8 Editing an Existing Query 17
5.9 Retrieving/Deleting Saved Queries 18
5.10 Using Quick Queries 18
5.11 Going Directly to a TIM 19
5.12 Querying a Text Field 19
5.13 Rerunning Last Query 20
6.0 Query Results 20
6.1 Open Existing TIMs 20
6.2 Paging through results 20
6.3 Results Reporting 21
6.4 Results Reporting - More Options 22
6.5 Printing Current Page 23
6.6 Adjusting Visible Columns 23

7.0 Reporting 25
7.1 Custom Reports 26
7.2 Aging Report 27
7.3 Activity & State Reporting Options 29
7.4 Defined Filters 31
7.5 Magnitude Matrix 32
7.6 Matrix Reporting 33
7.7 Metrics 34
7.8 State Distribution 35
7.9 State Transition 36
8.0 User Permissions 37
8.1 My Permissions 37
9.0 Maintenance 38
9.1 Change Password 38
9.2 Analysts 39
9.3 Edit Analyst Information 40
9.4 Add Multiple Analysts 40
9.5 Groups 41
9.6 Documents 43
9.7 Editing Group Permissions 44
9.8 Field Values 46
9.9 Configurable Fields 47
9.10 Field Filters 49
9.11 Field Control by State 50
9.12 State 51
9.13 TIM Deletion 53
9.14 Orthogonal Defect Classification 54
9.15 Project 54
9.15 Email Notifications 55
9.16 Email User Exceptions 56
9.17 Custom Email Notifications 57
9.18 State Machine 59
9.19 Customizing the TIM Form 60

Table of Figures

Figure 1 - PITS Home Page 2
Figure 2 - TIM Creation Form..... 3
Figure 3 - Relationships Screen..... 6
Figure 4 - Textual Relationships..... 7
Figure 5 - TIM Relationships..... 8
Figure 6 - Attachment Relationship..... 9
Figure 7 - Resolution Chronology Screen..... 10
Figure 8 - TIM Form Buttons 11
Figure 9 - Edit Multiple TIMs Screen..... 12
Figure 10 - Query Screen..... 13
Figure 11 - Query History Screen..... 16
Figure 12 - Save Query Screen..... 17
Figure 13 - Retrieving/Deleting Saved Queries..... 18
Figure 14 - Quick Query List..... 19
Figure 15 - Query Results 20
Figure 16 - Reporting Options Screen..... 21
Figure 17 - Advanced Reporting Options 22
Figure 18 - Printing Query Results 23
Figure 19 - View Maintenance Screen..... 25
Figure 20 - Custom Reports..... 27
Figure 21 - Aging Report Setup 29
Figure 22 - Activity & State Reporting Options 30
Figure 23 - Defined Filters Report Setup..... 31
Figure 24 - Magnitude Matrix Report Setup..... 32
Figure 25 - Matrix Report Setup 33
Figure 26 - Field Usage Metrics 34
Figure 27 - State Distribution Report..... 35
Figure 28 - State Transition Report Setup 36
Figure 29 - User Permissions Screen..... 37
Figure 30 - Change Password Interface 38
Figure 31 - Analyst Maintenance..... 39
Figure 32 - Edit Analyst Information..... 40
Figure 33 - Add Multiple Analysts 41
Figure 34 - Group Maintenance..... 43
Figure 35 - Document Maintenance..... 44
Figure 36 - Field Value Maintenance 47
Figure 37 - Configurable Fields Maintenance 49
Figure 38 - Field Filter Maintenance 50
Figure 39 - Field Control by State Maintenance..... 51

Figure 40 - State Maintenance 52
Figure 41 - Issue Maintenance 53
Figure 42 - Project Maintenance 55
Figure 43 - Email Maintenance 56
Figure 44 - Email Constraints Interface 57
Figure 45 - Custom Email Notifications Interface 58
Figure 46 - State Machine 59
Figure 47 - Customizing the TIM Form Interface 60

1.0 Introduction

The Project Issue Tracking System (PITS) is a tool that provides an automated approach to tracking and reporting IV&V and/or program issues through closure.

The system also provides advanced reporting capabilities, collaboration features well suited for distributed users, and extreme extensibility through comprehensive configuration capabilities.

2.0 Logging into PITS

1. Enter the PITS URL into your web browser.
2. Enter your username and password in the fields provided. Email the PITS Help Desk if you need assistance.
3. Click the "Login" button to complete PITS login.
4. Change your project if you are not automatically logged in to the project you wish to work in.

2.1 Changing Projects

1. Click on the "My Projects" link at the bottom of the Navigation Menu to expand the list of projects available to you.
2. Click on the project you wish to log in to.

3.0 The PITS Home Page

After logging into PITS, the PITS Home Page will be displayed in your web browser. The current project's name will be displayed by the "Project:" label and at the top of the Navigation Menu.

Figure 1 - PITS Home Page

3.1 Navigation Menu

The Navigation Menu on the left side of the screen will be available throughout the system. The items in this menu provide the user with access to the functionality offered by the application. The menu items that are available may differ for each user, depending on their permissions within the system. The "Information" and "Mail Support" links are useful if you need additional help.

3.2 User Information

Your user information is also displayed on the PITS Home Page. Be sure to keep this information current. The system will send email notifications and, therefore, requires an accurate email address. If you do not wish to receive email notifications when you make changes to a TIM, click the 'Do not send me emails...' checkbox.

4.0 Technical Issue Memorandums (TIMs)

The following sections describe the ways in which TIMs (issues) can be manipulated in PITS.

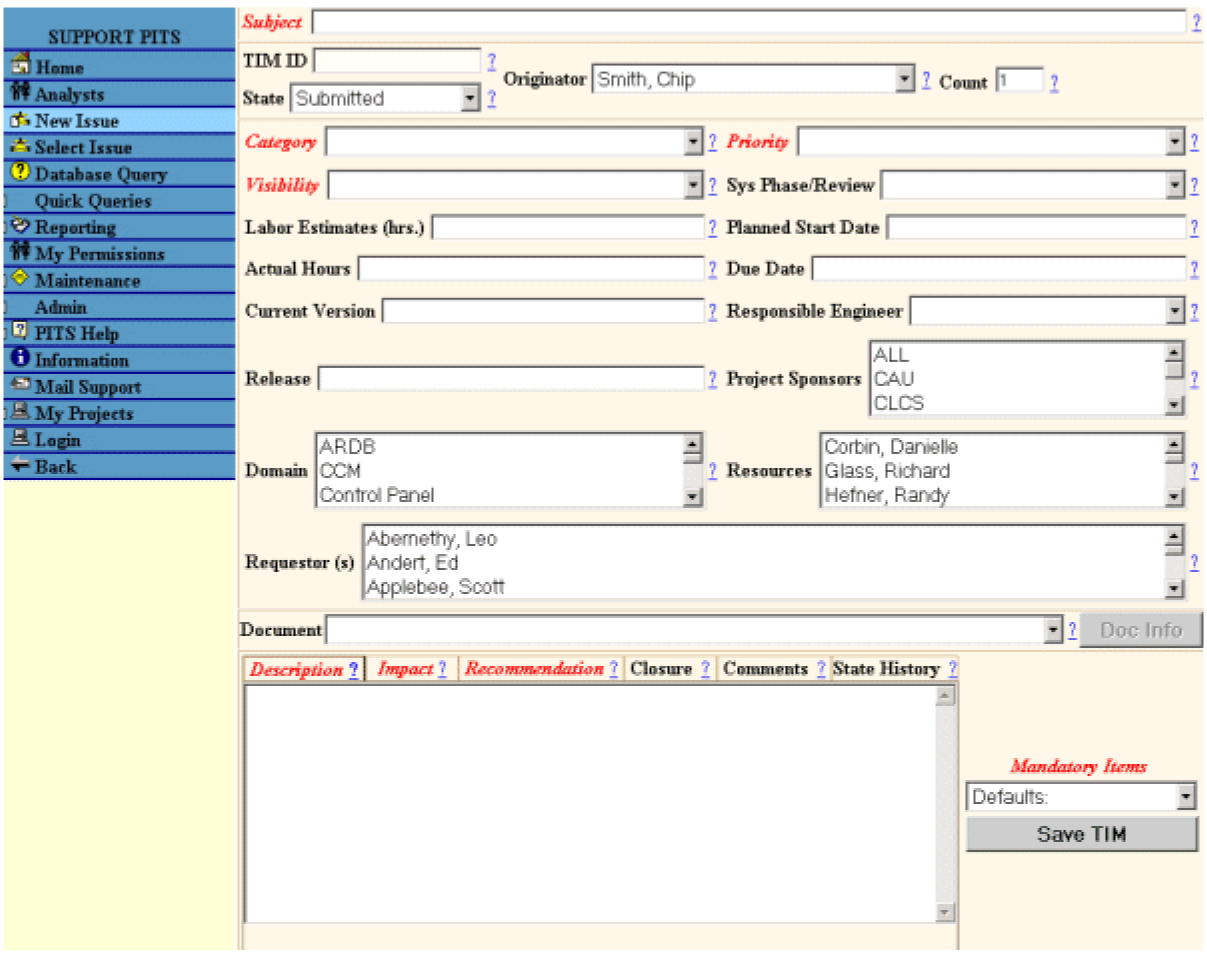

Figure 2 - TIM Creation Form

4.1 Creating a new TIM

The following steps describe the process of creating a new TIM. Making use of either the "User Defaults" option or saving an existing TIM as a new TIM by using the "Save As" option can simplify this process.

1. Click on the "New Issue" item on the Navigation Menu.
2. Enter or select a value for the fields describing the issue. You must enter values for fields whose labels are displayed in *red italics*. These are required fields. You may optionally enter values for the other fields.
3. If you are unsure about which value to enter or select for a field, click on the "?" to the right of the field for assistance. If you are still unsure, speak with your manager or team lead.
4. If the special "Document" field is visible, and you select a document, you may click the "Doc Info" button to enter information that identifies the portion of the document referenced by the TIM.
5. If you plan to fill out multiple TIMs that are similar to this one, you can save user defaults at this time.
6. Click on the "Save TIM" button to save your new TIM to the database.

4.2 Saving Defaults

PITS allows defaults to be saved in every available field.

1. Enter all data into the TIM form that you want to be in your defaults.
2. Pull down the "Defaults" selection box above the "Save TIM" button at the lower right corner of your screen.
3. Choose "Save User" to save user defaults or "Save Project" to save project defaults (if this option is available).
4. The TIM form will reload with your defaults after saving them.

4.3 Using Defaults

1. Save your defaults.
2. Click on the "New Issue" item in the Navigation Menu.
3. Your user defaults are now loaded.
4. To load project defaults, pull down the selection box above the "Save TIM" button at the lower right corner of your screen.
5. Click on the "Load Project" option.
6. The TIM form will reload with the project defaults. If the selected default does not exist, the fields will be cleared.

4.4 Opening an existing TIM

There are multiple methods by which an existing TIM can be opened for viewing or editing in PITS. The simple selection method is described here. Methods that allow the user to query for a specific TIM or a set of TIMs are described in the section on database queries.

1. Click the "Select Issue" item from the Navigation Menu.
2. Locate the TIM that you would like to view or edit by examining the list. You may also need to use the "Prev" and "Next" buttons to page through the TIMs until you locate the TIM in which you are interested.
3. Double-click the issue in the list to open it.

4.5 Updating an existing TIM

1. Open an existing TIM.
2. Make the necessary updates to the fields describing the TIM.
3. Click on the "Save TIM" button to save the changes to the database.
4. A revision will automatically be created containing the previous version of the TIM, which you have updated.

4.6 Adding Relationships

Relationships can be used to store text, files, or other TIMs that relate to a given TIM. To create a new relationship or edit an existing one, follow these steps:

1. Open the TIM that the relationship is to be associated with.
2. Click on the "Relationships" button.
3. Select the type of relationships to add from the "ADD" drop box or double click on an existing one to edit/view it.
4. Enter the necessary information for the given relationship type (Textual, TIM, or Attachment).
5. Click the "Save" button to save any changes.
6. Click the "Done" button to close the window and return to the previous one.

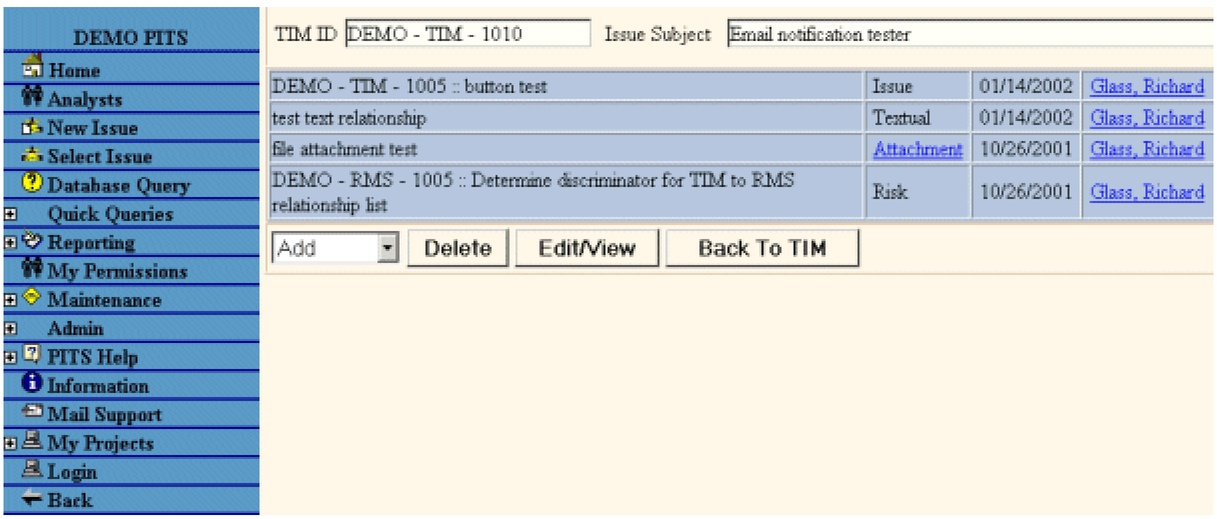

Figure 3 - Relationships Screen

4.7 Adding Textual Relationships

Textual Relationships store text that relates to a given TIM. To create or edit a textual relationship, follow these steps:

1. Open the TIM that the textual relationship is to be associated with.
2. Click on the "Relationships" button.
3. Select 'Textual' from the "ADD" drop box.
4. Enter the desired text in the text box.
5. Click the "Save" button to save any changes.
6. Click the "Done" button to close the window and return to the previous one.

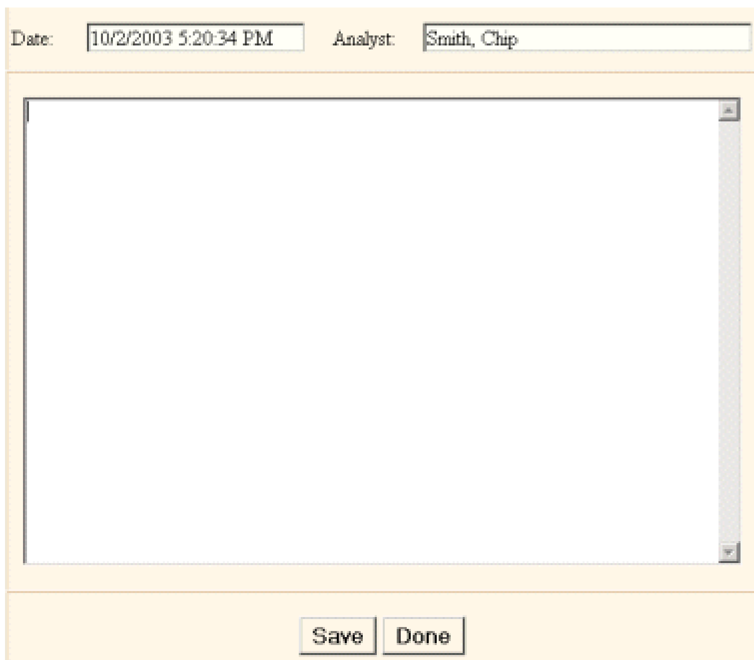

Figure 4 - Textual Relationships

4.8 Adding TIM Relationships

TIM relationships allow TIMs existing in the same project or other projects to be related. To create a TIM relationship, follow these steps:

1. Open the TIM that the relationship is to be associated with.
2. Click on the "Relationships" button.
3. Select “TIM” from the "ADD" drop box.

4. Select the desired TIM to relate to using the "Add TIM Relationships" list.

   To select TIMs in other projects, change the "Project" drop box to the desired project.

   To limit the list of TIMs available to add, select a saved query from the "Apply Query" drop box. This drop box will display a list of queries that are specific to the chosen project. For example, if the related TIM is in the Open state and the DEMO project has a saved query called “Open TIMs”, then this query can be selected and the “Existing TIM Relationships” list box will reload with only the TIMs that are in the Open state. So, instead of 1000 TIMs, the list may shrink to display only 10. This makes it easier to find the TIM of interest.

5. Click the "Save" button to save any changes.
6. Click the "Done" button to close the window and return to the previous one.

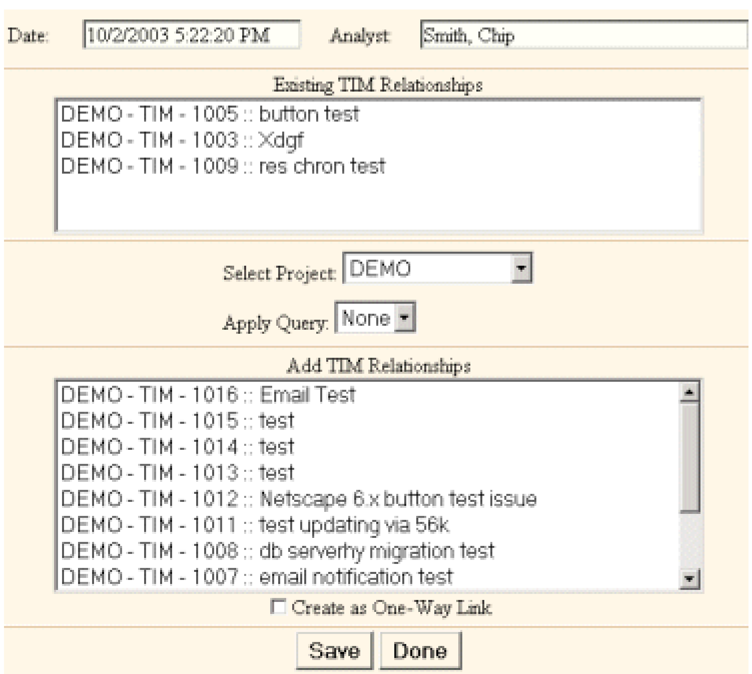

Figure 5 - TIM Relationships

4.9 Adding Attachment Relationships

Attachment relationships allow a file to be saved with a given TIM. To create or edit an existing attachment relationship, follow these steps:

1. Open the TIM that the attachment relationship is to be associated with.
2. Click on the "Relationships" button.
3. Select "Attachment" from the "ADD" drop box.
4. Click on the "Browse" button to load the file to be attached.
5. Enter descriptive text about the attachment in the text box.
6. Click the "Save" button to save any changes.
7. Click the "Done" button to close the window and return to the previous one.

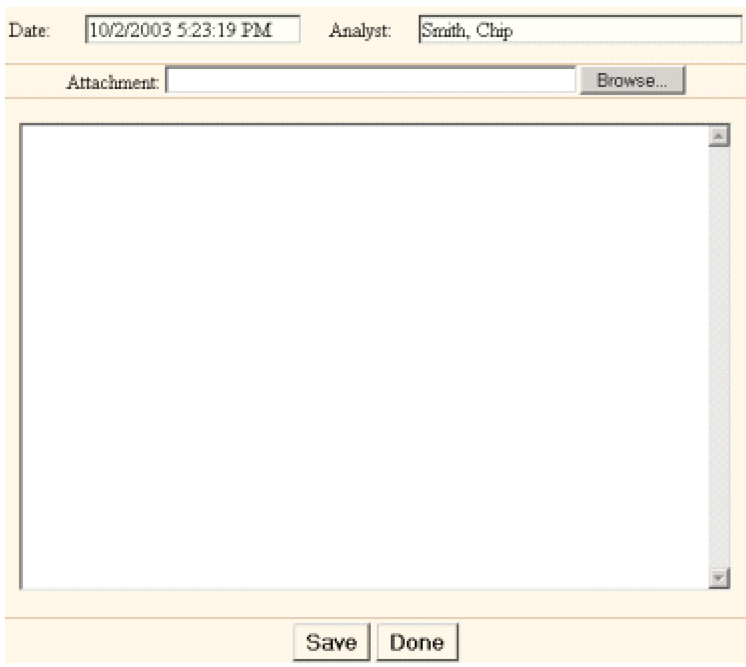

Figure 6 - Attachment Relationship

4.10 Creating/Editing Resolution Chronologies

Resolution Chronologies can be used to store notes or extra information about a given TIM. To create a new resolution chronology or edit an existing one, follow these steps:

1. Open the TIM that the resolution chronology is to be associated with.
2. Click on the "Resolution Chronology" button.

3. Click "Add" to create a new chronology or double click on an existing one to edit it.
4. Enter the text for the resolution chronology in the text box.
5. Click the "Save" button to save the resolution chronology.
6. Click the "Done" button to close the screen and return to the previous one.

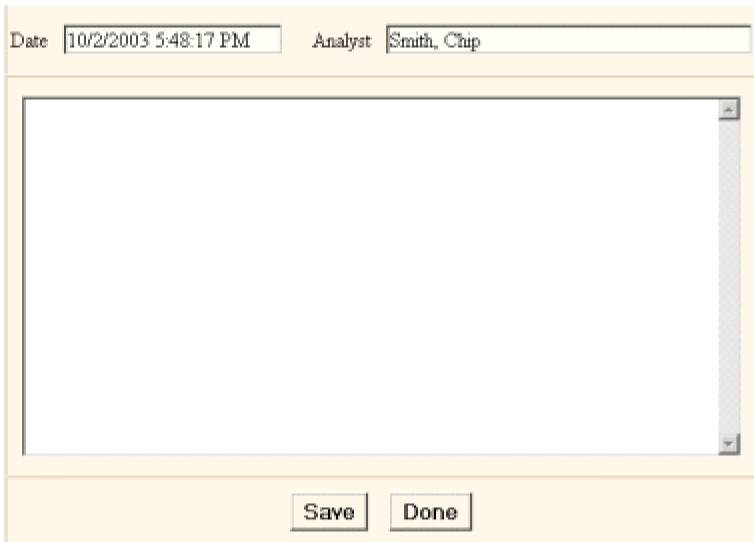

Figure 7 - Resolution Chronology Screen

4.11 Rollback a TIM

Rollbacks within PITS allow a previous revision of a TIM to become the current revision. All changes in revisions after the new current revision are removed. To rollback a TIM, the user will require the "Rollback Own" or "Rollback Any" permission available through Group Maintenance.

THIS PROCESS IS NOT REVERSIBLE

1. Open the TIM you wish to rollback.
2. Click on the "Revisions (...)" button.
3. Use the "<- Revision" and "Revision ->" buttons to find the revision to rollback to.
4. Click the "Rollback Issue" button to begin the rollback process.
5. Click "Ok" when asked if you are sure you wish to delete the data.
6. Click "Ok" to keep any relationships created after the given revision. Click "Cancel" to delete them.
7. Click "Ok" to keep any resolution chronologies created after the given revision. Click "Cancel" to delete them.

8. Click "Ok" to finalize the process or "Cancel" to abort.

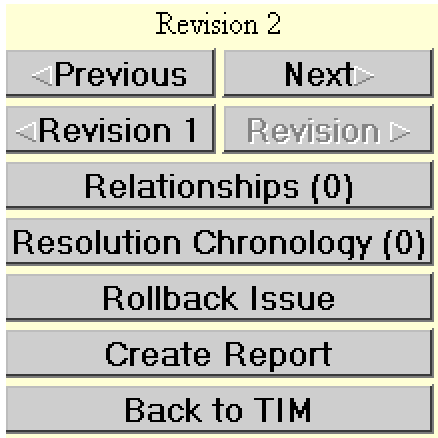

Figure 8 - TIM Form Buttons

4.12 Creating a copy of a TIM (Save As)

1. Open the existing TIM that you would like to create a copy from.
2. Click the "Save As" button.
3. Click "Ok" to create a relationship with the new TIM and the current one.
4. Update all fields in the new copy you wish to change.
5. Click the "Save TIM" button to save the new TIM.

4.13 Editing Multiple TIMs

1. Run a query or click on the "Select Issue" menu item in the Navigation Menu.
2. Click on the "Edit" link in the lower left-hand corner of the page. It may be necessary to change the columns displayed before performing this step. To change the columns that will be displayed for editing, select a view from the drop box located on the lowest left corner of the page. Select "Setup" to create a new view if.
3. Edit the fields of the TIMs.
4. Click on the "Save Issues" button.

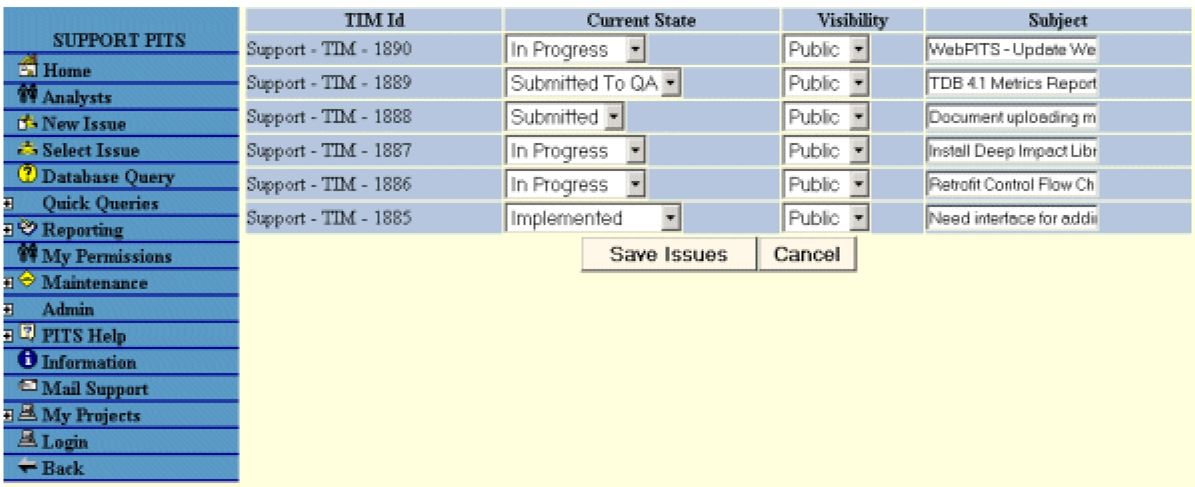

Figure 9 - Edit Multiple TIMs Screen

4.14 Spell Checker

Visit http://129.164.50.230/tools/asp/SpellCheck.asp for more information.

5.0 Querying the Database

You can query for TIMs in PITS meeting a given criteria by going to the Database Query page pictured below. From this screen you will be able to specify the criteria that you want your results to match.

As you build your query, a description of your current query will appear in the blue box in the top center of the page, which reads, "Show me all Issues" or contains the description of the last executed query. Entering data or selecting values in the fields located below the query description builds queries. Note that a dark blue border surrounds these fields.

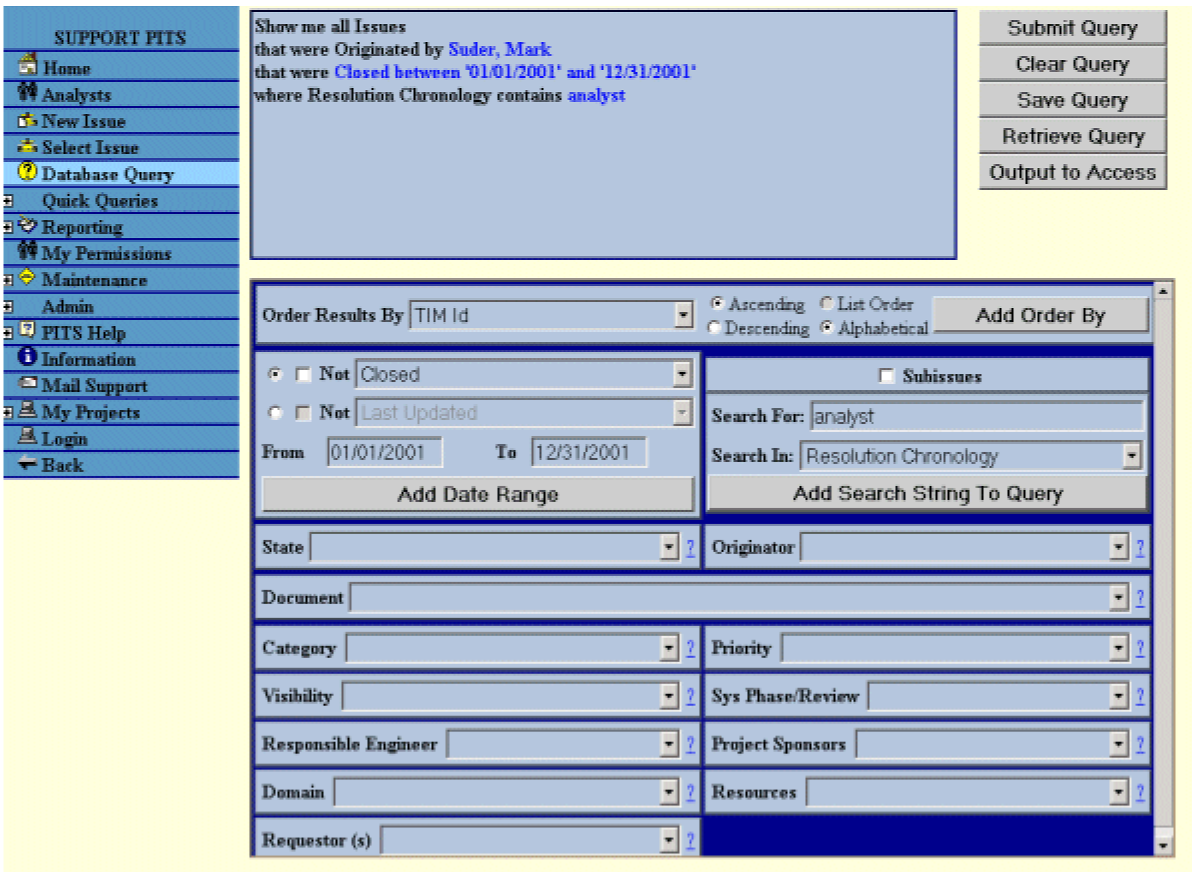

Figure 10 - Query Screen

5.1 Build a Query on a Date Range

To build a date range query, use the following procedure:

1. Locate the fields that allow you to specify a data range. These fields are directly above the "Add Date Range" button.
2. Using the radio buttons, choose the type of date query. Use the first radio button to select a State for a specific date range query. Ex. You'd like to see all TIMs that were in the Open state between 9/2/2003 and 9/30/2003. Use the second radio button to select an actual Date Field Value for a specific date range. Ex. You'd like to see all TIMs where the "Last Updated" date was between 9/2/2003 and 9/30/2003.
3. If desired, check the "Not" checkbox next to the radio buttons to reverse the query. Using our examples above, by checking the "Not" checkbox beside the first radio button, you will see all TIMS that were NOT in the Open state between 9/2/2003 and 9/30/2003. Checking the "Not" checkbox beside the second radio box will show you all TIMs that were NOT last updated between the dates.
4. Specify the date range by entering a start date in the "From" field and an end date in the "To" field.
5. Click the "Add Date Range" button to add the date range to your query.

5.2 Build a Query on a Text String

To build a text string query, use the following procedure:

1. Locate the fields that allow you to specify a text string search. These fields are directly above the "Add Search String To Query" button.
2. Enter the text you would like to search for in the "Search For:" field. For example, you might want to search for the word "testability".
3. Select a value from the "Search In" list to choose the TIM field within which you would like to search for the search string.
4. Hover your mouse over the "Add Search String To Query" button to preview the search query. Continue if the query is acceptable.
5. Click the "Add Search String To Query" button to add the text search to your query.

5.3 Build a Query for a Select List Value

To build a query for one or more selection values, use the following procedure:

1. Locate the select list labeled with the name of the field you want to search on. The special "State", "Originator", and "Document" fields are located at the top, and the remaining fields are in the same order as they appear on the TIM form. It may be necessary to scroll to find the desired list.
2. Choose the values for the given field that should be selected for TIMs returned by the query. You can select the "Null" value at the end of the list to find TIMs that have no value specified for the field. For example, you may want to look for all of your Open TIMs. You would select your name under the “Originator” textbox and “Open” under the “State” field.

5.4 Order a Query by a Returned Field

You can specify a particular order for the TIMs to be displayed on the Database Query Screen. If multiple “Order By” fields are required, the results will be ordered by each field in the order they were selected

1. Refer to the select list labeled "Order Results By".
2. From the "Order Results By" list, select the field by which you wish to order your query results.
3. Select the "Ascending" radio button to sort the query results in ascending order, or select the "Descending" radio button to sort the query results in descending order.
4. Click the "Add Order By" button to add the ordering to your query.

5.5 Executing a query

After building the query you desire, in the query description field at the top of the screen will display your query to you. You can submit the query by clicking the "Submit Query" button at the top of the page. The matching TIMs will then be displayed on the query results page.

5.6 Loading a Previous Query

The five most recent queries run are available for viewing and loading.

1. Click on the " Database Query" menu item in the Navigation Menu.
2. Click the "Retrieve Query" button at the top right of the page.
3. The five most recent queries run are displayed under **Query History**.
4. Double click on a query to load the given query.

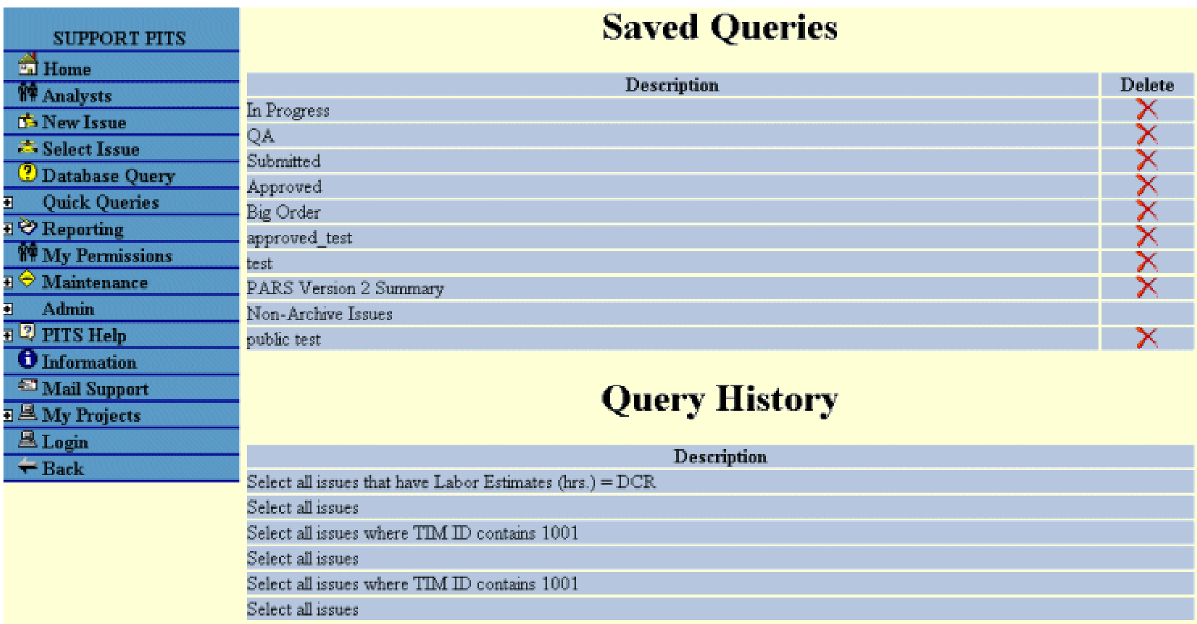

Figure 11 - Query History Screen

5.7 Saving Queries

After building a query you can use the "Save Query" button at the top right-hand side of your screen to save the query for later use.

1. Build a query.
2. Click the "Save Query" button.
3. Type a description for your query. (If you were searching for items originated by you, a possible description is "My items".)
4. Check the box labeled "Make Available to Project" if you want this query to be public to all project personnel.
5. Click the "Save" button.
6. Access your saved queries from the "Quick Queries" menu item in the Navigation Menu or using the "Retrieve Queries" button on the Database Query page.

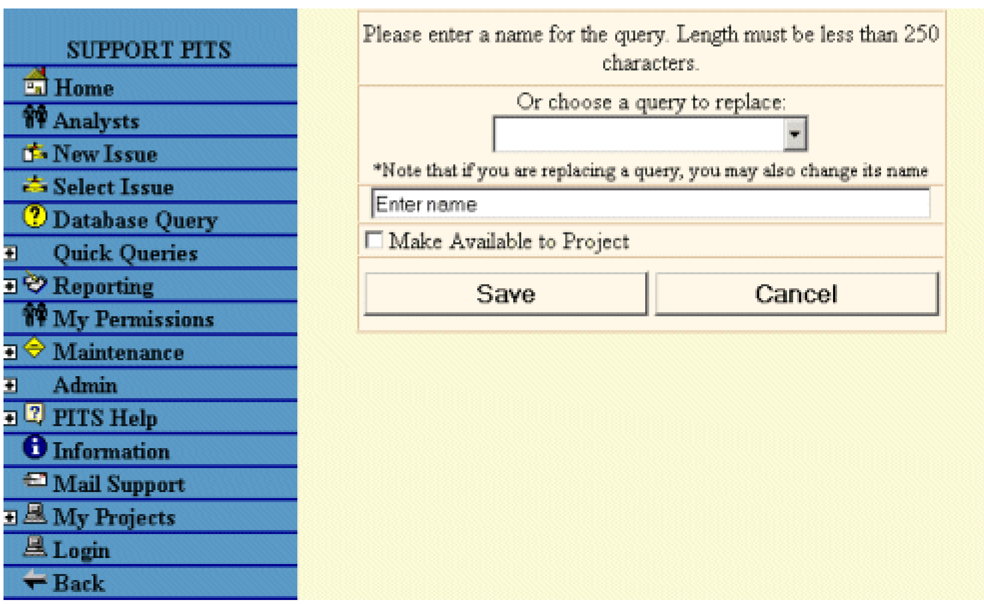

Figure 12 - Save Query Screen

5.8 Editing an Existing Query

1. Retrieve an existing query
2. In the Database Query page, make the desired changes to the query.
3. Click the "Save Query" button.
4. Select the existing query from the dropdown list identified by the label "Or choose a query to replace".
5. Click the "Save" button.
6. Click the "Ok" button to overwrite the existing query.

5.9 Retrieving/Deleting Saved Queries

To retrieve or delete an existing query, follow this procedure:

1. Click on the " Database Query" menu item in the Navigation Menu.
2. Click the "Retrieve Query" button at the top right of the page.
3. To retrieve an existing query or previous query run, double-click the description of the desired query from the list of available queries; or
4. To delete an existing query, click on the to the right of the query you wish to delete. (Items without an "X" are public queries and cannot be deleted.)

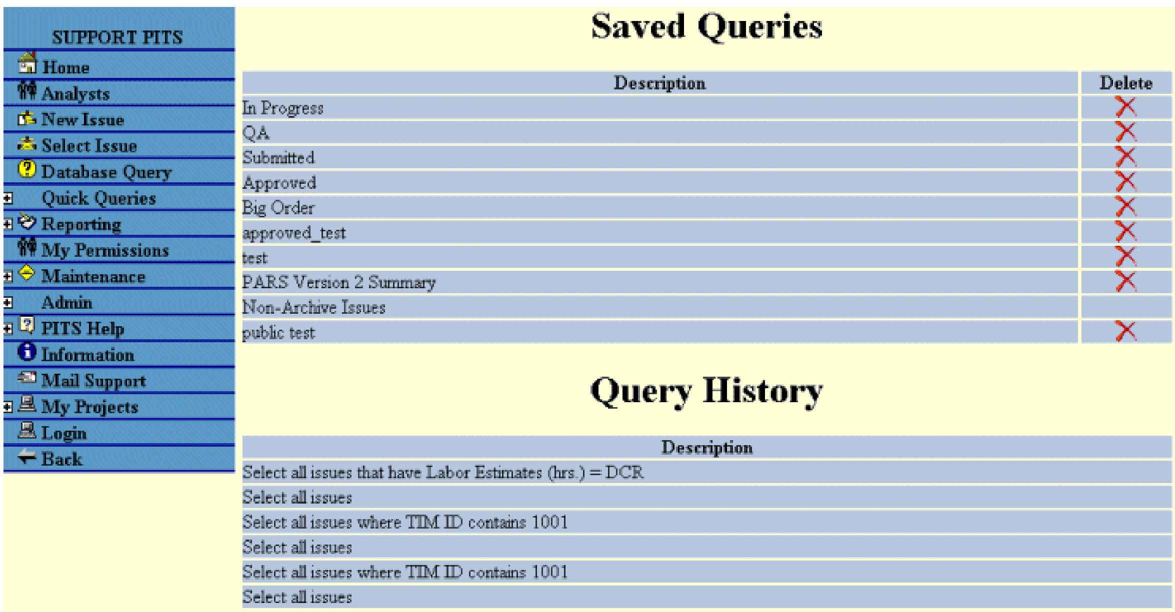

Figure 13 - Retrieving/Deleting Saved Queries

5.10 Using Quick Queries

To use a quick query, you will first need to save a query. After you have saved a query, you can execute the query from “Quick Queries” by following this process:

1. Click on the "Quick Queries" menu item from the Navigation Menu.
2. Click on the type of quick query you wish to open.
    - Click on Field to run searches on a given text field.
    - Click on Public to run public quick queries.
    - Click on Private to run private quick queries.
3. Click on the description of the query you wish to execute.

4. Your query is executed and the results are displayed on the query results page. You can also now select the "Database Query" menu item from the Navigation Menu if you wish to edit this query.

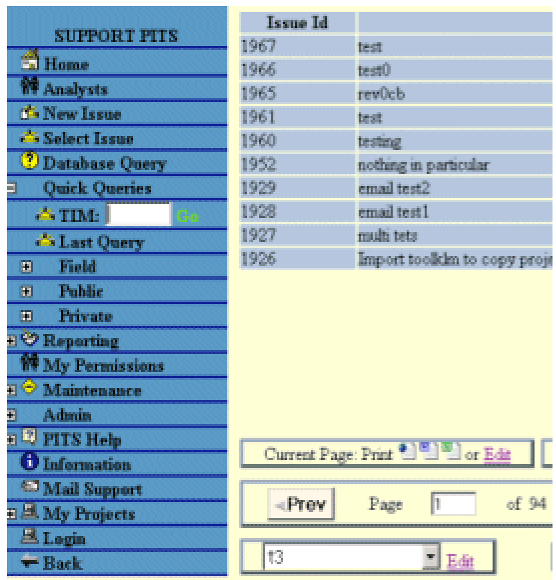

Figure 14 - Quick Query List

5.11 Going Directly to a TIM

1. Click on the "Quick Queries" menu item in the Navigation Menu.
2. Enter the TIM ID of the TIM you wish to view in the "TIM" textbox.
3. Click the "Go" link to jump directly to the requested TIM.

5.12 Querying a Text Field

Some text fields within PITS can be directly queried against. These fields must be marked as [quick search fields](#) in field maintenance.

1. Click on the "Quick Queries" menu item from the Navigation Menu.
2. Click on "Field" (If not available, there are no fields in the project that are marked as quick query).
3. Enter the search parameter for the given field.
4. Click on the Go button.
5. Your query is executed and the results are displayed on the query results page.

5.13 Rerunning Last Query

1. Click on the "Quick Queries" menu item from the Navigation Menu.
2. Click on the "Last Query" menu item.
3. Your query is executed and the results are displayed on the query results page.

6.0 Query Results

The query results page will be visible when you click on the “Select Issue” menu item from the Navigation Menu, execute a Quick Query, or submit a query from the Database Query page.

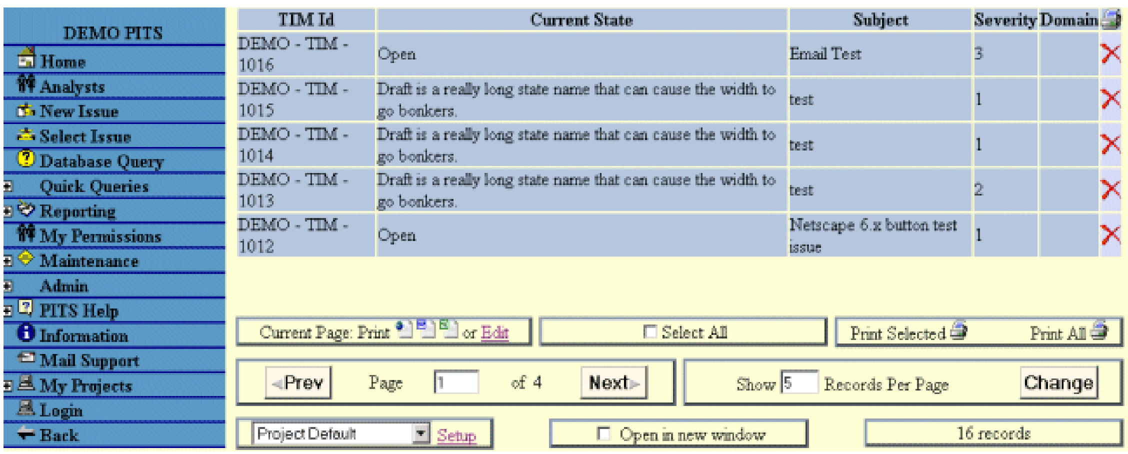

Figure 15 - Query Results

6.1 Open Existing TIMs

From the query results page, double-click the row of the TIM you wish to view. To open the TIM in a new browser window, select the “Open in new window” checkbox at the bottom center of the page BEFORE double-clicking the TIM.

6.2 Paging through results

1. Click on the "Prev" or "Next" buttons to page through the TIMs returned by your query; or
2. Enter the page number in the "Page" textbox between these buttons and press the Enter or Return key on the keyboard to jump to a specific page in the query results.

6.3 Results Reporting

1. Click once on each of the TIMs in the results list to select a subset of TIMs for the report, or click on the "Select All" checkbox to select all listed TIMs for the report. *Note that only the TIMs that are visible on this page will be printed. All other pages will NOT be printed.
2. Click on the image labeled "Print Selected" at the bottom of the page or the at the top of the page to create a document consisting of all TIMs now having a beside them. Or, click on the image labeled "Print All" to create a document consisting of all TIMS returned by the query.
3. Select the report type. (TIM or a custom report)
4. Select the report format. (EXCEL, HTML, or RTF).
5. Make sure the checkbox labeled "Insert page breaks after every TIM" is not checked if you do not want page breaks between TIMs.
6. Click the "More Options" link to specify the contents of reports using the HTML or RTF format.
7. Click the "OK" button to generate the report.

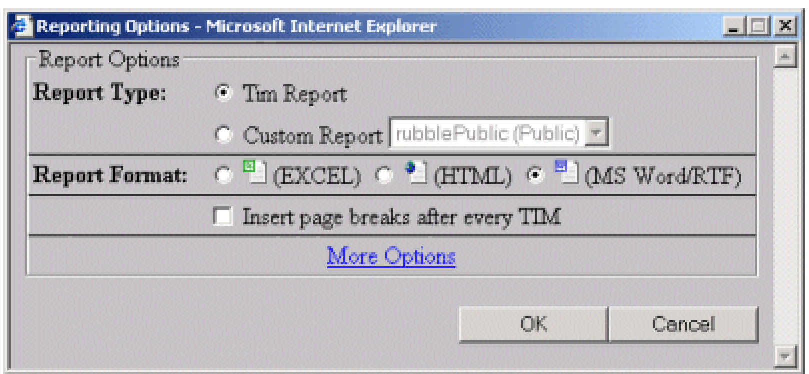

Figure 16 - Reporting Options Screen

6.4 Results Reporting - More Options

The reporting dialog has a link selection labeled “More Options”. This allows you to specify the contents of TIM reports using the RTF or HTML formats. By selecting this link, the dialog will expand, displaying more options for printing TIMs. To use the “More Options” functions, perform the following steps:

1. Open the Reporting Dialog by initiating report generation.
2. Click on the "More Options" link.
3. Select a desired value from the "Report Length" list. *Note: "No Report" includes TIM ID, "Short Report" adds standard fields, "Long Report" adds all short text fields.
4. Click the "Include Revision History" checkbox if you wish to display the changes made to the TIM for each revision.
5. Click the "Remove Blank Fields" checkbox if you wish to hide standard or short text fields that contain no values.
6. Click the "Include Cover Page" checkbox if you wish to have a cover page added to your RTF document.
7. Click the "Remove Section Spacing" checkbox if you do not wish to include spacing between sections.
8. Click any of the remaining checkboxes to include the corresponding item in the report.
9. Click on the "No Blanks" checkbox for a given item to hide the item when it contains no values.
10. If you wish, click the "alert me…" checkbox to provide warnings when creating large reports.

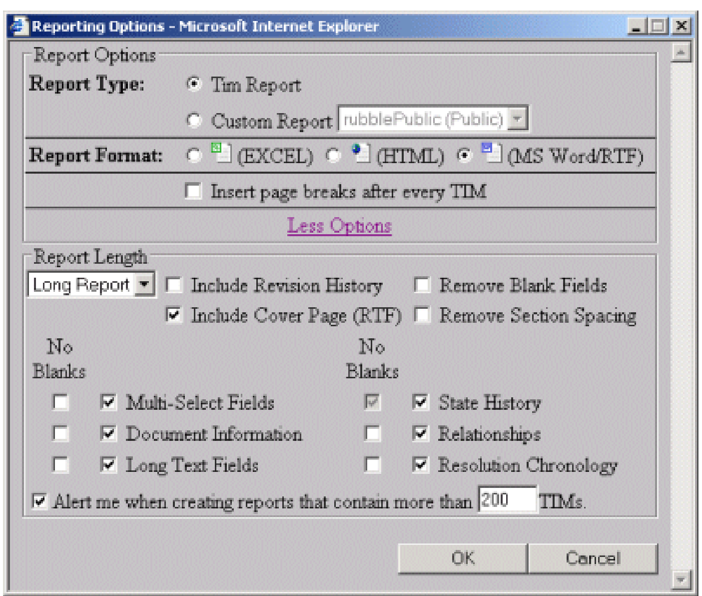

Figure 17 - Advanced Reporting Options

6.5 Printing Current Page

This reporting option will generate a tabular view of the TIMs returned in the query results page. The information in the table is based on the columns that are selected for display.

1. From the query results page, click on one of the following icons:
   - o - HTML Format
   - o - RTF Format
   - o - EXCEL Format
2. In a new browser window a tabular report is displayed in the requested format.

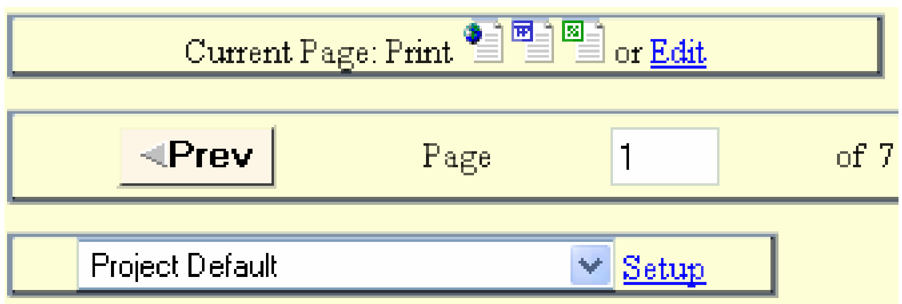

Figure 18 - Printing Query Results

6.6 Adjusting Visible Columns

To change the columns that appear on the Query Results page, you can select a View from the drop box at the bottom left of the page or create a new view by clicking on the "Setup" link beside the drop box. By selecting a new view from the drop box, the page will automatically reload with the column selections that exist for that specific view.

To create a new view, edit an existing one, or delete a view, perform the following steps from the Query Results page:

1. Click the "Setup" link at the bottom left of the page. This will open the View Maintenance page.
2. To edit an existing view, select the view name in the select view drop box. This will load the columns selected for this view under the "Field Names To Be Displayed" text box.
3. To create a new view, select "Create New View" from the action list selection box at the bottom of the page. The default columns will load under the "Field Names To Be Displayed" text box.

4. Enter the name of the view in the "View Name" text box, if creating a new one.
5. To add one or more columns to the view, select the column name(s) in the text box under “Available Fields Not Being Displayed” and click the "->" button. You can use general Windows functionality by holding the CTRL key or Shift key on your keyboard to select multiple column names.
6. To remove one or more columns from the view, select the columns names from the right text box labeled “Field Names To Be Displayed” and click the "<-" button.
7. To change the order in which columns appear in the list (left to right on the Query Results page), first select the column name from the “Field Names To Be Displayed” list. Move the name up or down the list by clicking the ▲ and ▼ buttons.
8. To save the view and stay on the View Maintenance page, select “Save View” from the action list.
9. To save the view and return to the Query Results screen, select “Save and Return to Select Screen” from the action list.
10. To cancel changes made to a view and remain on the View Maintenance page, select the “Cancel Changes” option from the action list. This will reload the view with the most recent saved columns.
11. To cancel changes made to a view and return to the Query Results page, click “Cancel and Return To Select Screen” from the action list. This will cancel any changes and return you to the Query Results page.
12. To delete a view, select the view you wish to delete by selection it from the “View Name” selection box. Click “Delete View” from the action list. This is irreversible. *NOTE: The view labeled “Project Default” cannot be deleted. Also, modifying this view is restricted and can be set up through Group Maintenance.

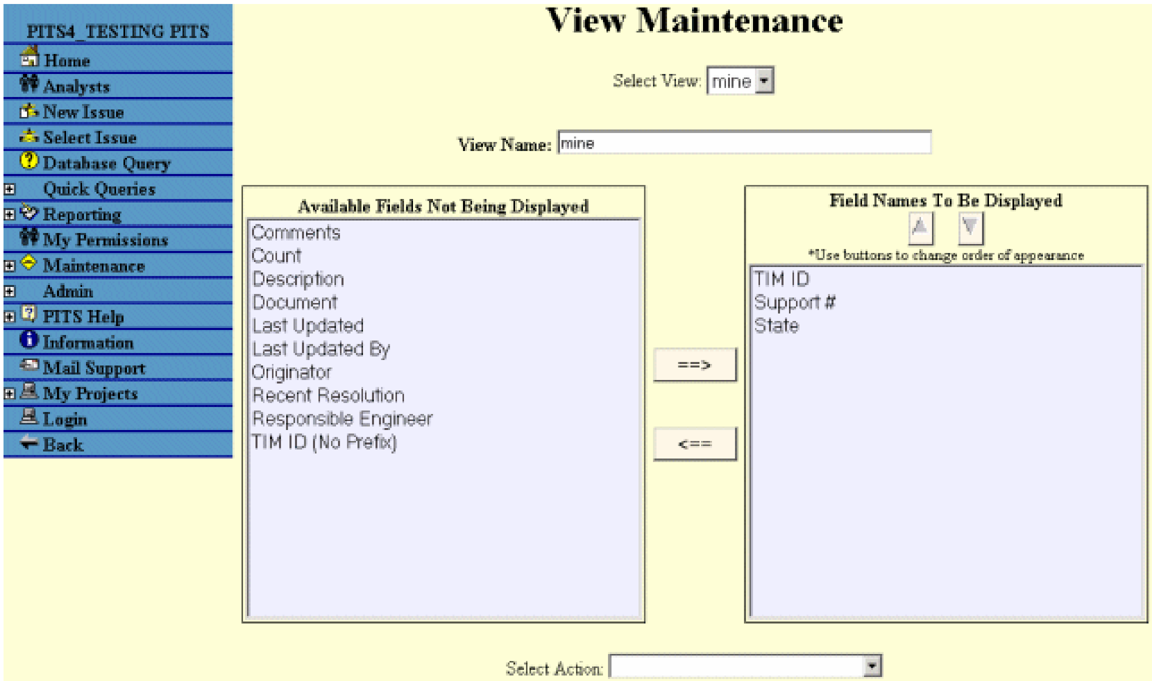

Figure 19 - View Maintenance Screen

7.0 Reporting

Once you click on the “Reporting” menu item in the Navigation Menu, a submenu will expand that provides several options to pick from. You can choose from Custom Reports, Aging Report, Activity/State, Defined Filters, Magnitude Matrix, Matrix Reporting, Metrics, State Distribution, and State Transition. These reporting options are described in the following sections.

*Some reports may not be available for use in every project.

**Many reports contain counts of issues. It should be noted that “issue count” totals refers to the sum of the entries in the TIM “count” field which is set to “1” by default.

7.1 Custom Reports

You can reach the PITS Report Builder by clicking the “Custom Reports” menu item from the “Reporting” menu of the PITS Navigation Menu. The Report Builder will be opened in a separate browser window. The Report Builder allows you to create your own reports that you can use in PITS. You create a template for your report, specifying where TIM data will be placed within that report. Each report you create will be capable of displaying that data for individual TIMs within PITS. You can generate these reports from the Report Dialog that can be accessed via the TIM Page or the Select Issue Page. At any time, you can also click the “New” button to create a new report. You can use the “Add After” and “Add Before” radio buttons to specify where items (text, new lines, or table rows) will be added to your report. “Add After” specifies that the item will be added after the currently selected item in the report template. “Add Before” specifies that the item will be added before the currently selected item in the report template. If there are no items in your report, this setting has no effect, because new items will always take up the first line of the report. You can add text to a report by clicking the “Add Text” button. When you click the button, a line of text is added to the report. The text is initialized with the text “”. You can double-click on the text field that was added and change it to the text that you would like to appear in the report. You can add a new line to a report at any time by clicking the New Line button. This is a convenient way to put a hard return in your report. You cannot double-click the new line to edit its contents.

1. Click on the "Reporting" menu in the Navigation Menu.
2. Click on the "Custom Reports" menu item.
3. Define the settings for the report, give the report a title, and create the contents of the report.
4. Click the "Save" button.

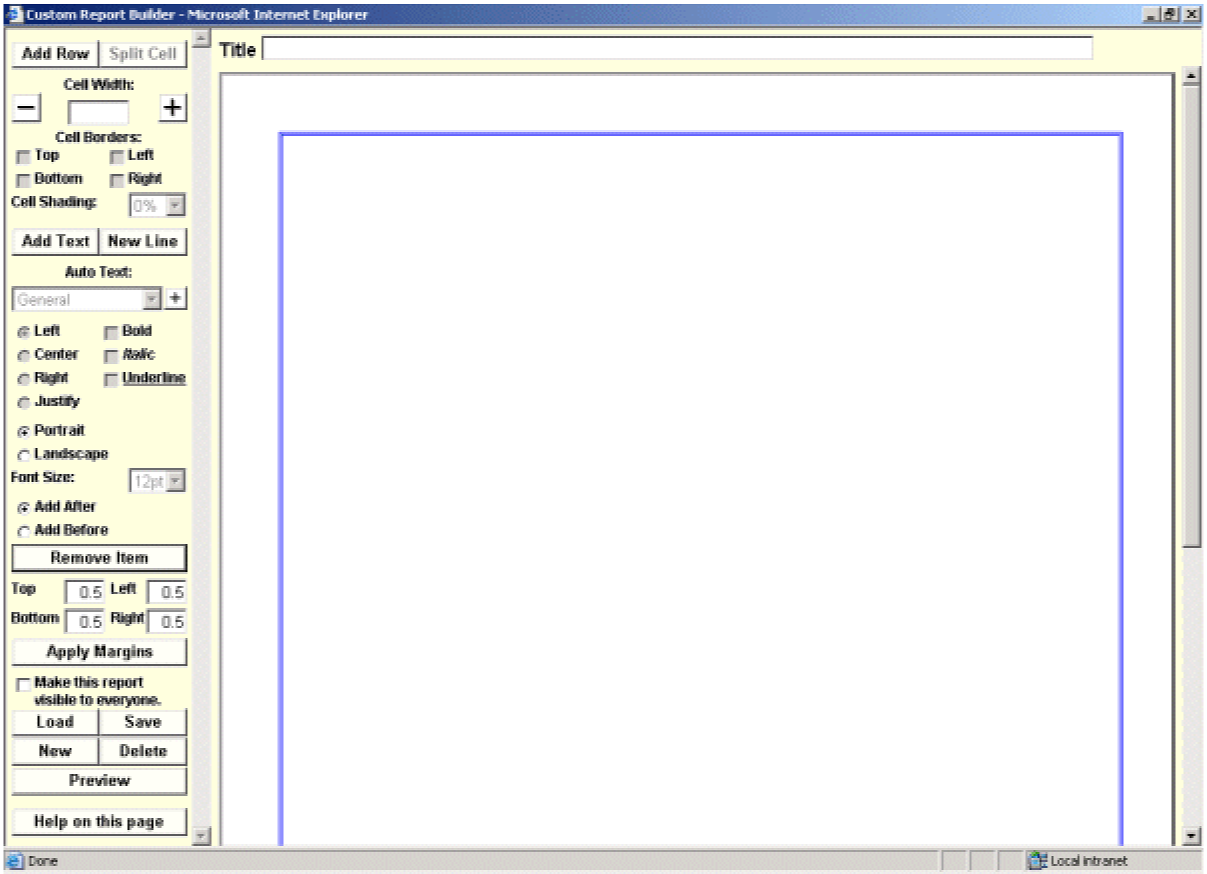

Figure 20 - Custom Reports

7.2 Aging Report

The Aging Report allows the user to view the "age" of TIMs. An example illustrating the usefulness of this report would be to generate a report showing the age of unresolved TIMs. By viewing the amount of time that has been passed since the TIM's state changed, a user can determine the number of "stale" TIM on the project.

The settings that determine the report contents are as follows:

- **Ending Date:** The date up to and including the last day you want aging information. This will allow you to gather aging information even on time periods that are in the past.
- **Criteria:** Allows you to attach a saved query to the report. This allows the report to be generated on a subset of TIMs.
- **Group By:** Allows you to break down the results of the aging report based on the selected field. For example, you may want to see the aging of the TIMs distributed across various severity levels.

- **Interval:** This is the number of days to include in each period.
- **Number or Intervals:** This is the number of periods to display.
- **Aging Start State:** This is the beginning state of TIMs that will be counted when calculating the aging information.
- **Aging Exit States:** These are the states that once entered, the TIM is no longer considered in the aging calculations. For example, if Open was selected as the start state then the logical choice for exit states could be Closed or Closed with Concerns. Once the TIM has progressed from Open to one of these states then the TIM is no longer considered to be aging. Since In Progress was not selected, even though the TIM may not be Open, it has not met the exit criteria and is still considered to be aging.
- **Included Totals:** This allows the user to include totals (TIM counts) for states other than the start state. The only TIMs that will be counted are the TIMs that were in the start state and the selected included states before the specified ending date.

To run the Aging report, perform the following steps:

1. Click on the "Reporting" menu item on the Navigation Menu.
2. Click on the "Aging Report" menu item.
3. Specify values for the fields described above to generate the desired report.
4. Click on one of the format icons to create the report of the corresponding format.

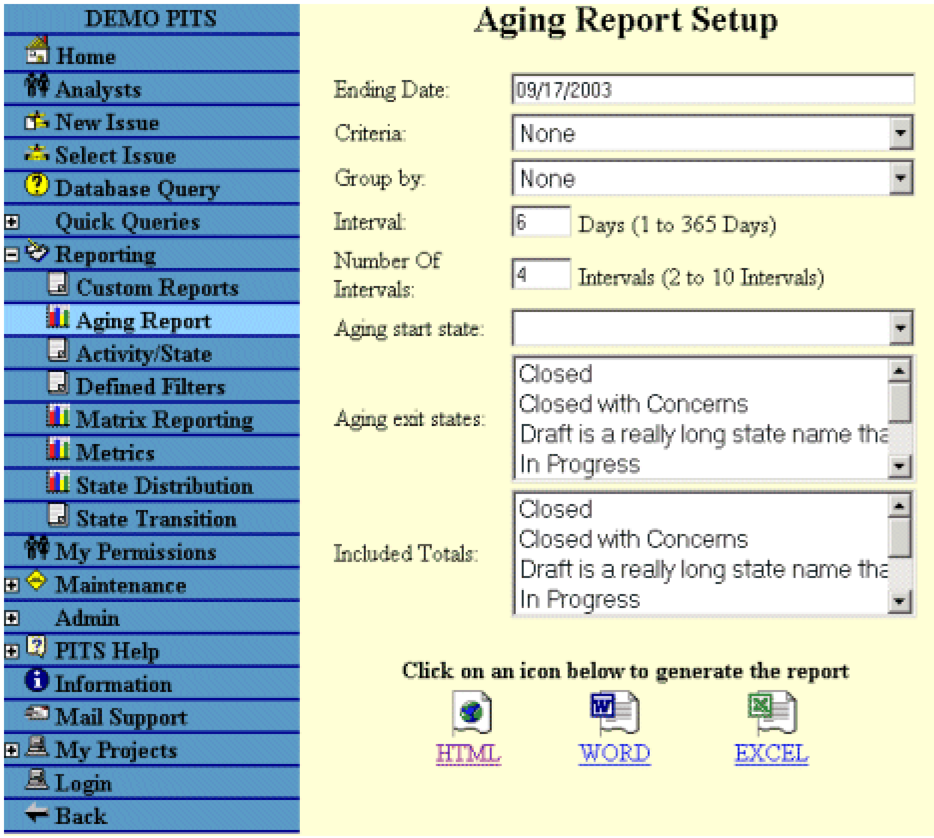

Figure 21 - Aging Report Setup

7.3 Activity & State Reporting Options

The activity report summarizes all TIMs that have had a resolution chronology entry during the date period specified. The state report summarizes all TIMs that have had a state change during the date period specified. The following steps show you how to run these reports:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. Click on the "Activity/State" menu item.
3. Choose the time period in which a TIM was changed or resolved.
4. Choose either State Report or Activity Report.
5. After selecting State or Activity select either a summary report or a detailed report.
6. When choosing fields to display, hold the shift key or Ctrl key on your keyboard down in order to choose more than one field.
7. If you wish, choose a saved query to limit the set of TIMs upon which the report is generated.

8. Click on one of the format icons to create a report of the corresponding format.

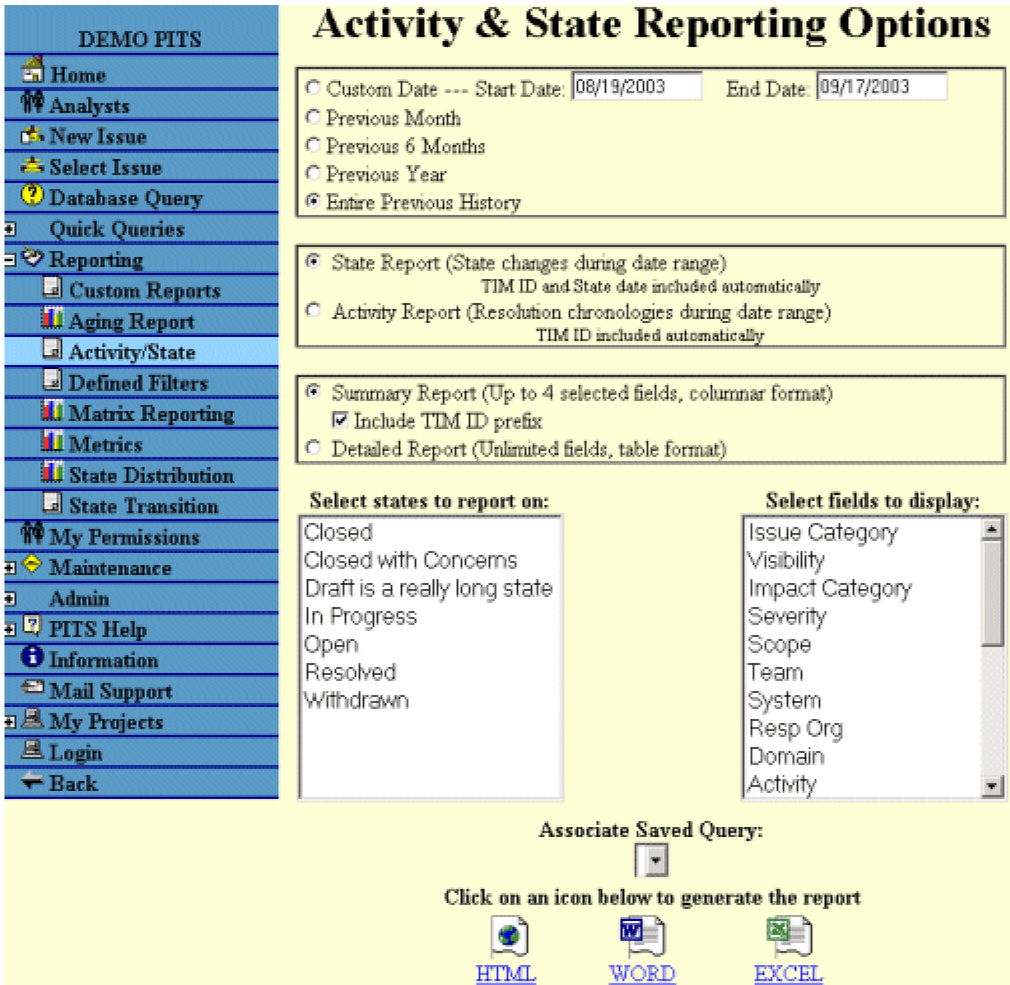

Figure 22 - Activity & State Reporting Options

7.4 Defined Filters

The Defined Filters report will display how fields are used to filter other fields for selection on the TIM Form. The default report displays a general overview of field relationships. The detailed reports display the field values and associated filtered values. To view the Defined Filters report, perform the following steps:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. Click on the "Defined Filters" menu item.
3. Select the relationship to create a detailed report on.
4. Click on one of the format icons to produce a report with the corresponding format.

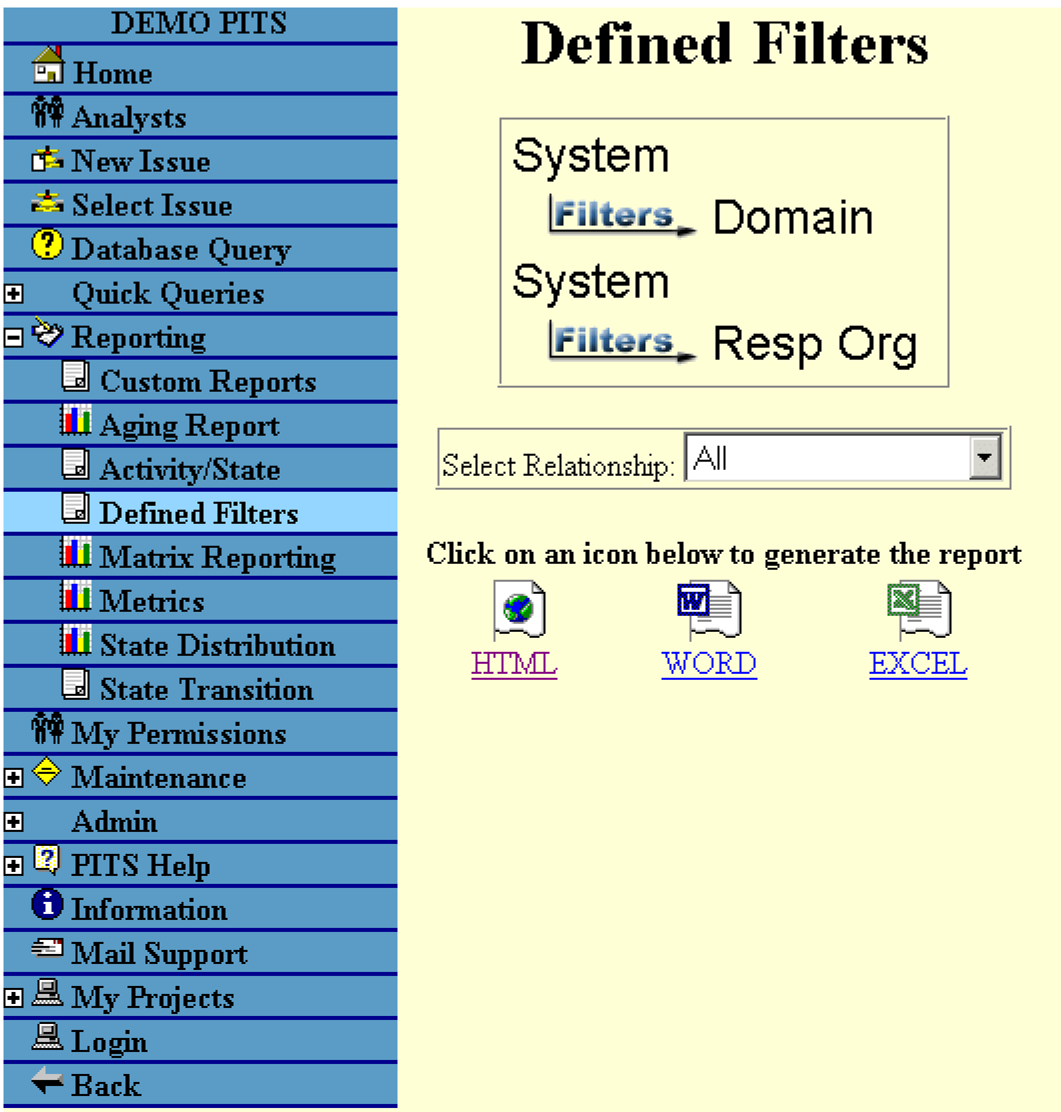

Figure 23 - Defined Filters Report Setup

7.5 Magnitude Matrix

This report is a specialized version of the Matrix report for use with projects that contain single select fields named "Likeliness" and "Consequence". It is a replacement for the magnitude matrix report that was provided by the RMS application. To view the Magnitude Matrix report, perform the following steps:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. Click on the "Magnitude Matrix" menu item.
3. Enter a title for the report in the "Report Title" textbox.
4. Select the state that will be reported on from the "Current State" list. You may also choose "All" to view all states.
5. If you wish, you can select a saved query to limit the report to those TIMs returned by the query.
6. Click on one of the format icons to produce a report of the corresponding format.

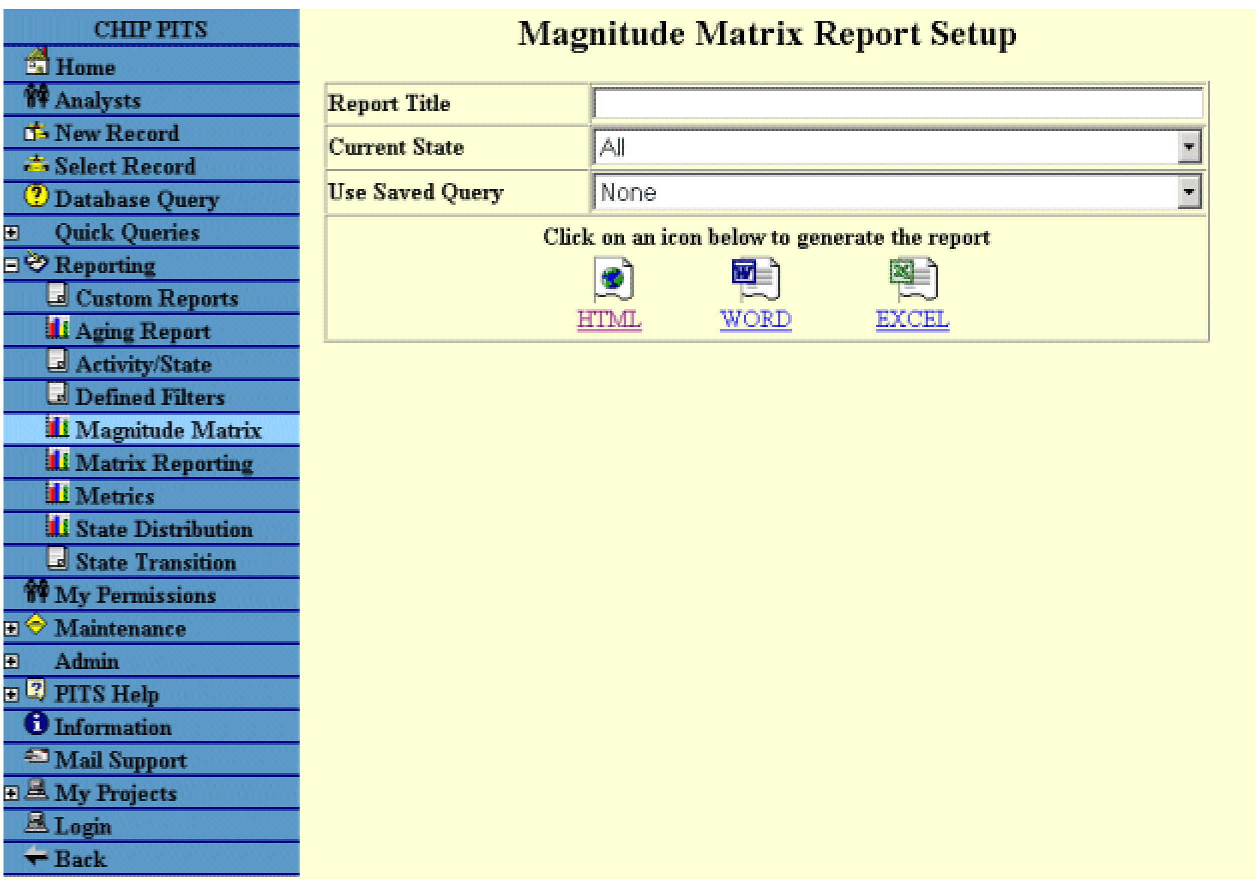

Figure 24 - Magnitude Matrix Report Setup

7.6 Matrix Reporting

This report allows the user to compare the values of any two single selection fields of the project. You can view the Matrix Report by performing the following steps:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. Click on the "Matrix Reporting" menu item.
3. Enter a title for the report in the "Report Title" textbox.
4. Select the field to be used as the vertical axis from the "Select Vertical Axis" list.
5. Select the field to be used as the horizontal axis from the "Select Horizontal Axis" list.
6. Select the state that will be reported on from the "Current State" list. You may also choose "All" to view all states.
7. If you wish, you can select a saved query to limit the report to those TIMs returned by the query.
8. Click on one of the format icons to create the report of the corresponding format.

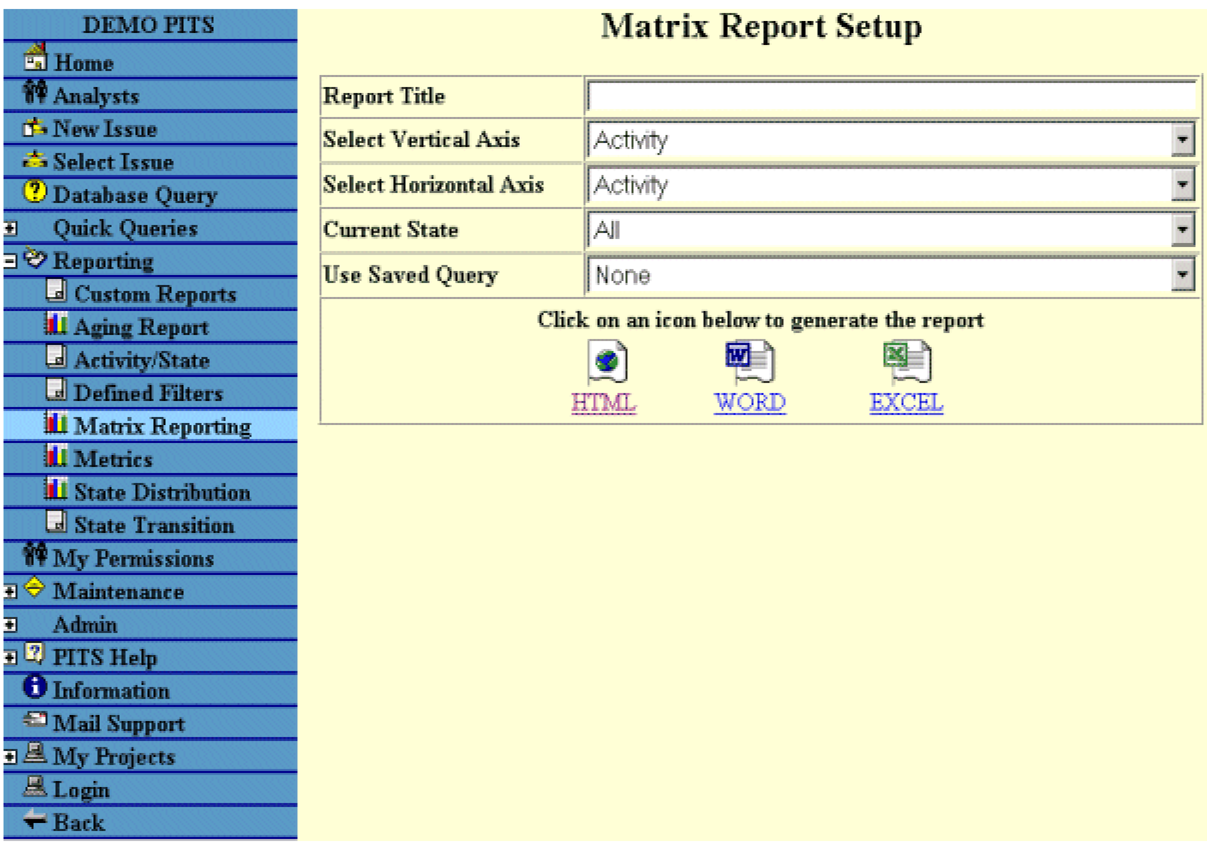

Figure 25 - Matrix Report Setup

7.7 Metrics

Field usage metrics allows the user to view a chart comparing any two fields of the project. Before viewing the chart, you are able to specify the listed field, the breakdown field, the chart type, and apply a query. You can view the Metrics report by performing the following steps:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. Click on the "Metrics" menu item.
3. Select values for the "Listed Field", the "Breakdown Field", and "Chart Type". You also have the option of applying a query that will limit the set of TIMs upon which the report is generated.
4. Click on one of the format icons to produce a report with the corresponding format.

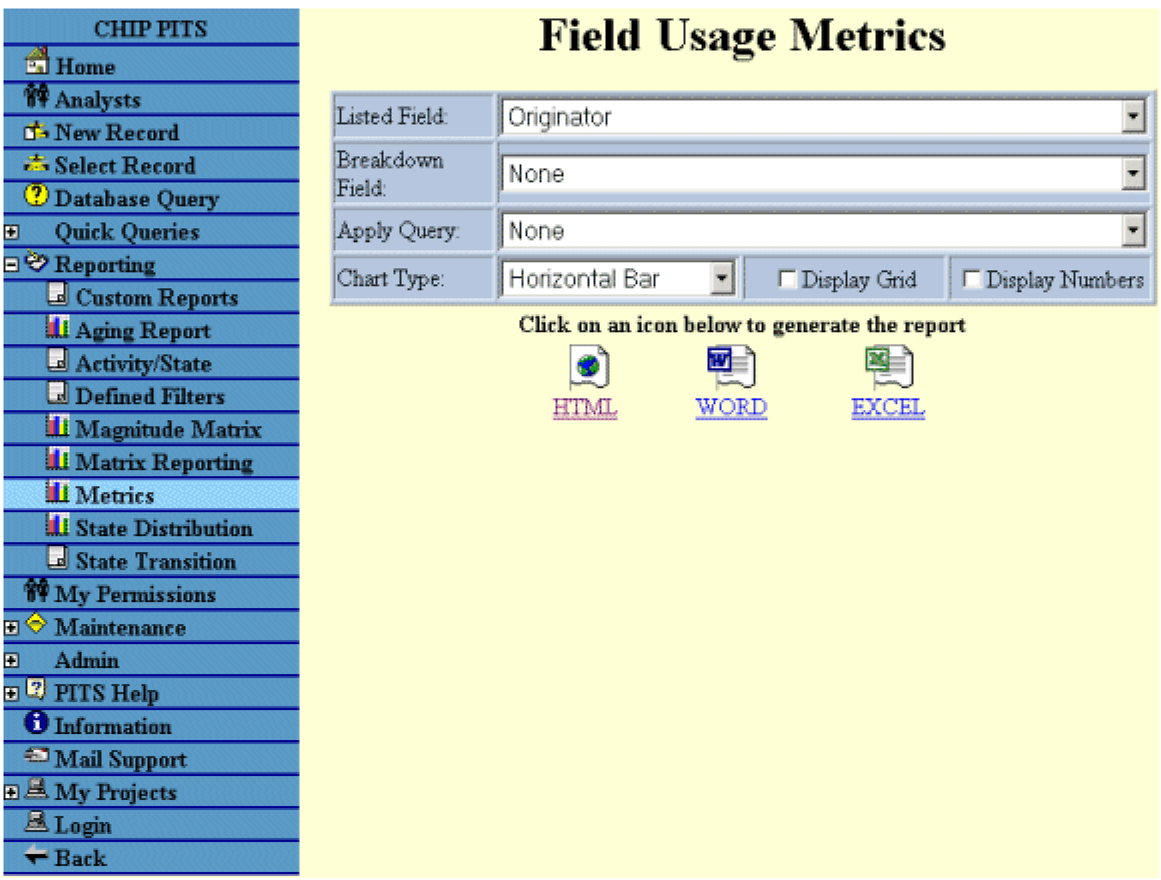

Figure 26 - Field Usage Metrics

7.8 State Distribution

The State Distribution report displays a pie chart illustrating the distribution of TIM states across the project. To view the State Distribution report, perform the following steps:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. If desired, select a saved query to limit result set.
3. Click on the EXCEL or RTF format icons to produce the corresponding reports.

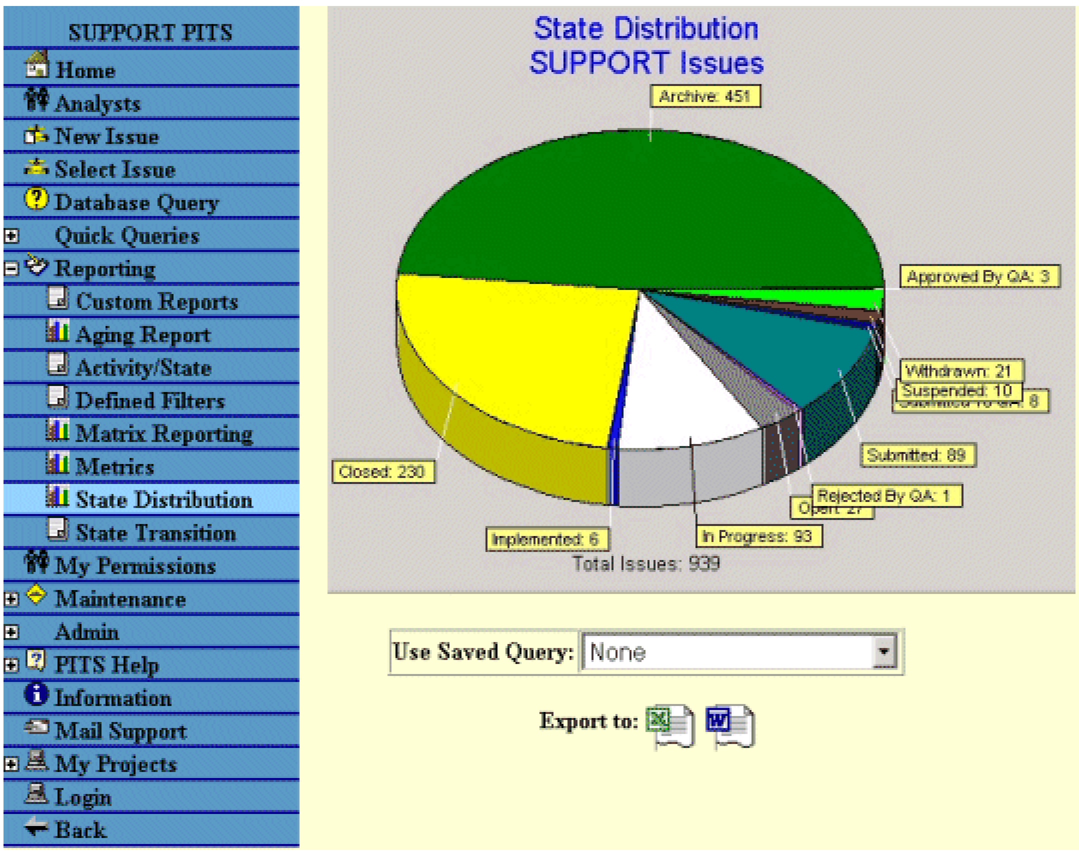

Figure 27 - State Distribution Report

7.9 State Transition

This report will display information about the number of TIMs that transitioned into a given state during the time period entered. TIMs that transitioned multiple times into a given state in the time period entered will only be counted once. You can view the State Transition report by performing the following steps:

1. Click on the "Reporting" menu item in the Navigation Menu.
2. Click on the "State Transition" menu item.
3. Enter the date range in the "From" and "To" textboxes.
4. Select a saved query to apply to limit the results set. *(Optional)*
5. Select the states to display by using the "->" and "<-" buttons. The order in which items are listed in the "Display Order" list will be the order in which the states appear on the report.
6. Click on one of the format icons to produce a report of the corresponding format.

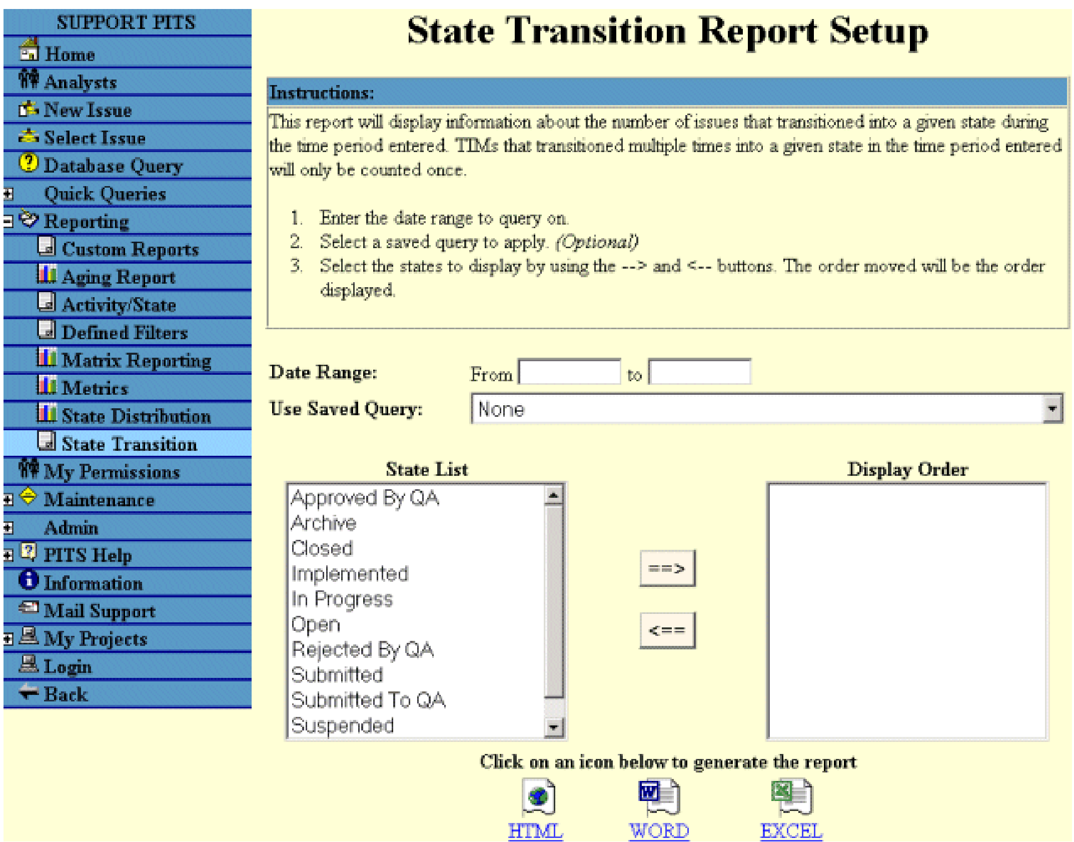

Figure 28 - State Transition Report Setup

8.0 User Permissions

The permissions granted to a user in PITS consist of the union of the permissions granted to the groups to which the user belongs. Permissions can be divided into three categories:

- Permissions allowing the user to perform TIM state transitions.
- Permissions allowing the user to edit a TIM depending on the state of the TIM.
- Permissions allowing the user to perform tool-specific functions, such as project maintenance.

8.1 My Permissions

By clicking on “My Permissions” on the Navigation Menu, you can view a list of permissions you have been granted for the project you are currently logged into.

If you want to view which groups you belong to, select a group name from the “Group Name” select box. By selecting a new value, the page is reloaded and will display that specific group’s project permissions.

If you are assigned to more than one group, you inherit all the possible permissions created by combining groups.

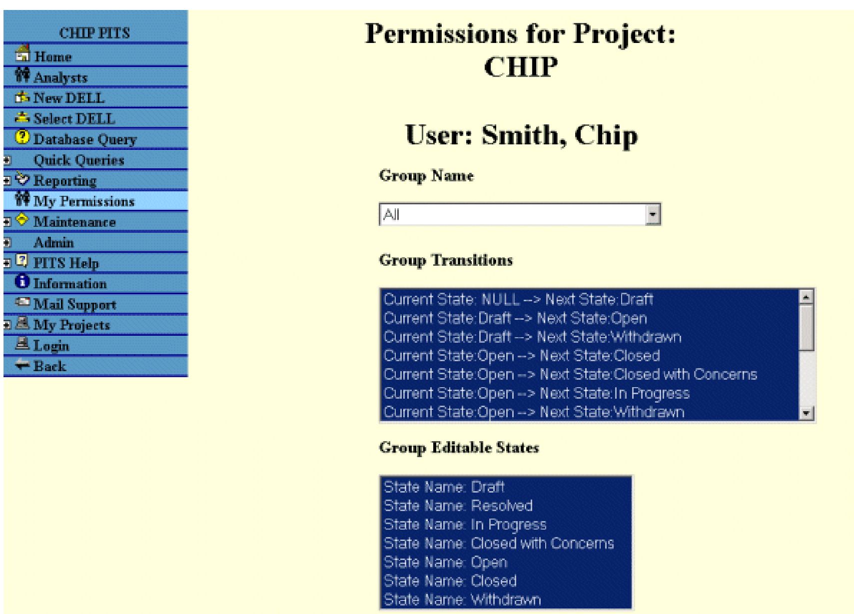

Figure 29 - User Permissions Screen

9.0 Maintenance

In order to perform maintenance operations in PITS, a user must be granted the appropriate permissions. A user's project manager or team lead can grant maintenance permissions at their discretion.

9.1 Change Password

Passwords in PITS must be at least 9 characters long and contain at least one non-alphanumeric character (ie, any character other than a letter, number, or underscore). To change your password in PITS, perform the following steps:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Change Password" menu item.
3. Enter your old password.
4. Enter your new password twice.
5. Click the "Change Password" button.

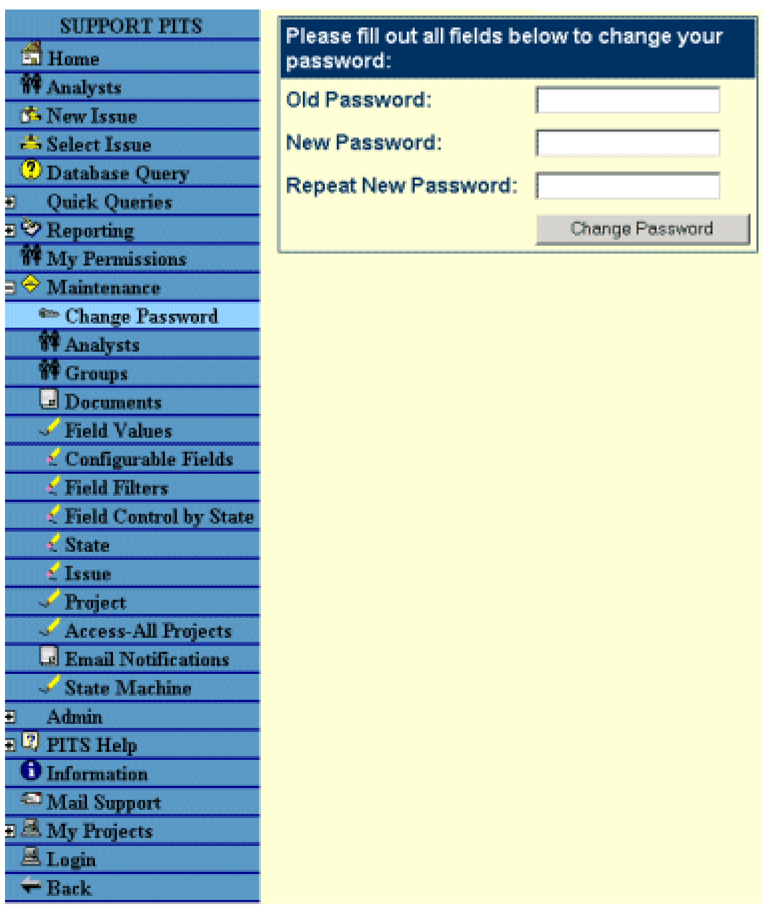

Figure 30 - Change Password Interface

9.2 Analysts

Clicking on the "Analysts" menu item in the Navigation Menu displays a listing of all the analysts, their ID numbers, phone numbers (plus extension if necessary), and e-mail addresses. Detailed information for an analyst can be viewed by clicking the analyst's name in the list. If granted the appropriate permissions, a user can edit the analyst's information, send the analyst a welcome email or inform the analyst of changes made to their account information.

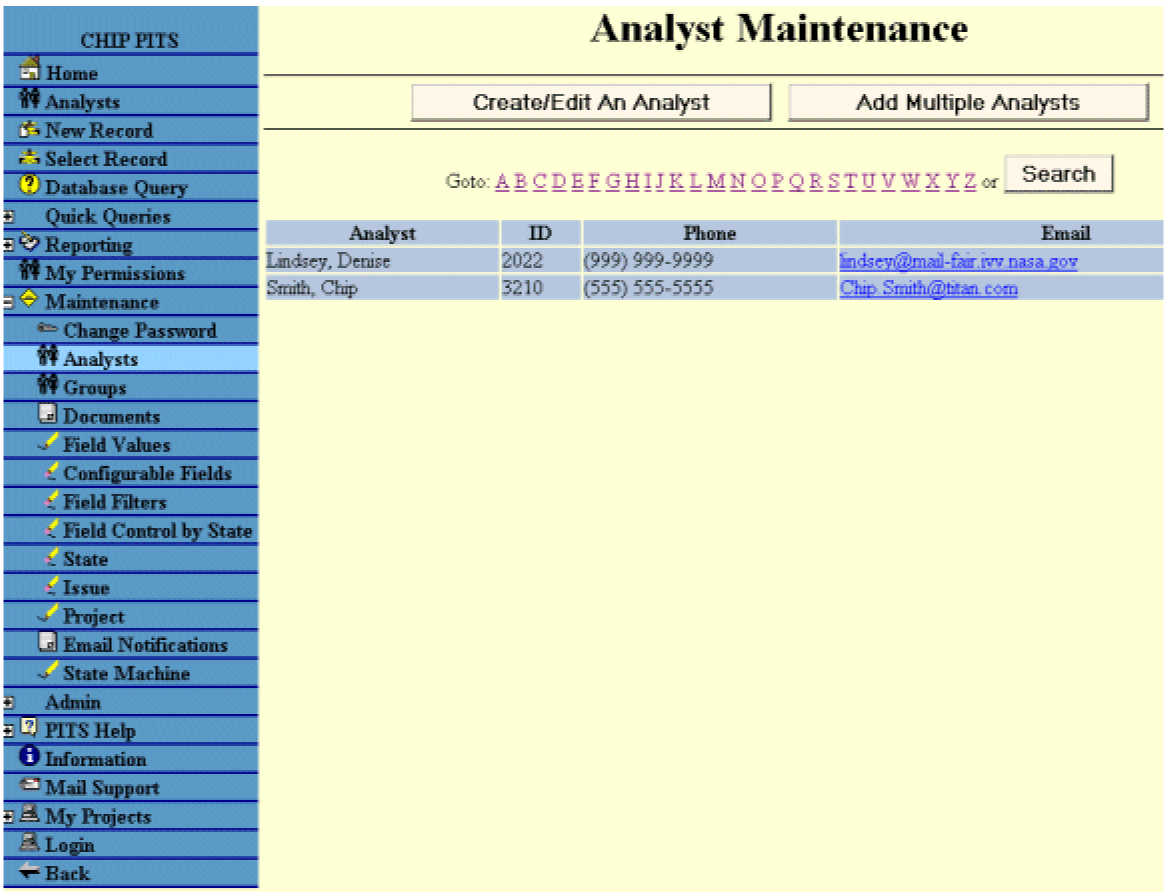

Figure 31 - Analyst Maintenance

9.3 Edit Analyst Information

1. Click on Maintenance.
2. Click on Analysts.
3. Click on the name of the analyst or click on the "Create/Edit An Analyst" button at the top of the page.
4. Update the desired information and groups.
5. Click on the "Inform Analyst of Changes" checkbox to send the analyst an email with his/her updated information.
6. Click on the "Save Analyst Information" button to save changes.

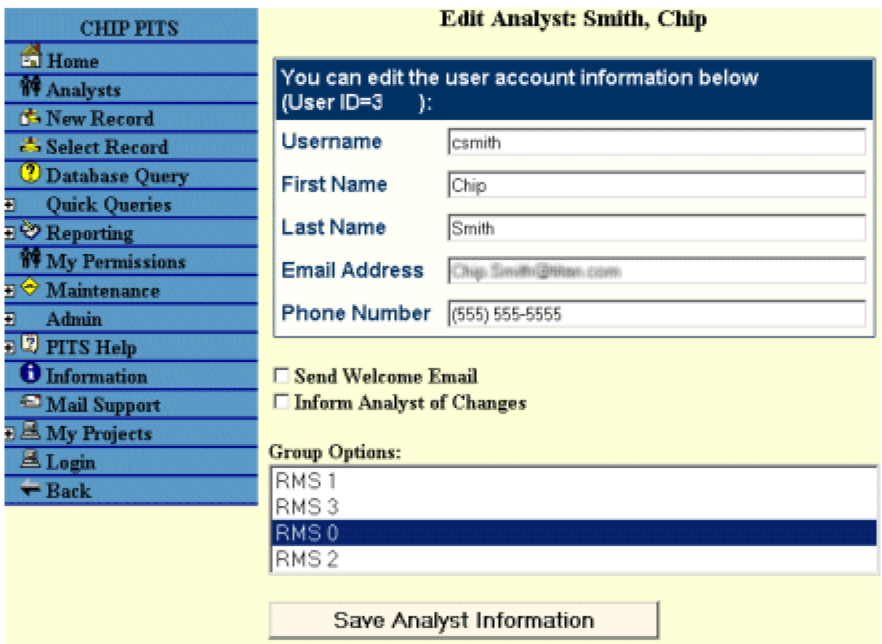

Figure 32 - Edit Analyst Information

9.4 Add Multiple Analysts

1. Click on Maintenance.
2. Click on Analysts.
3. Click on the "Add Multiple Analysts" button.
4. Select the analysts to add to the project from the "Available Analysts" list.
5. Use the "==>" button to move the selected analysts to the "Added Analysts" list.

   Use the "<==" button to remove analysts from the "Added Analysts" list.

6. Click the "Send Welcome Email" checkbox to send an email to the added analysts informing them of the new project.

7. Select the group(s) in the "Group Options" list to assign the analysts to.
8. Click on the "Save Changes" button.

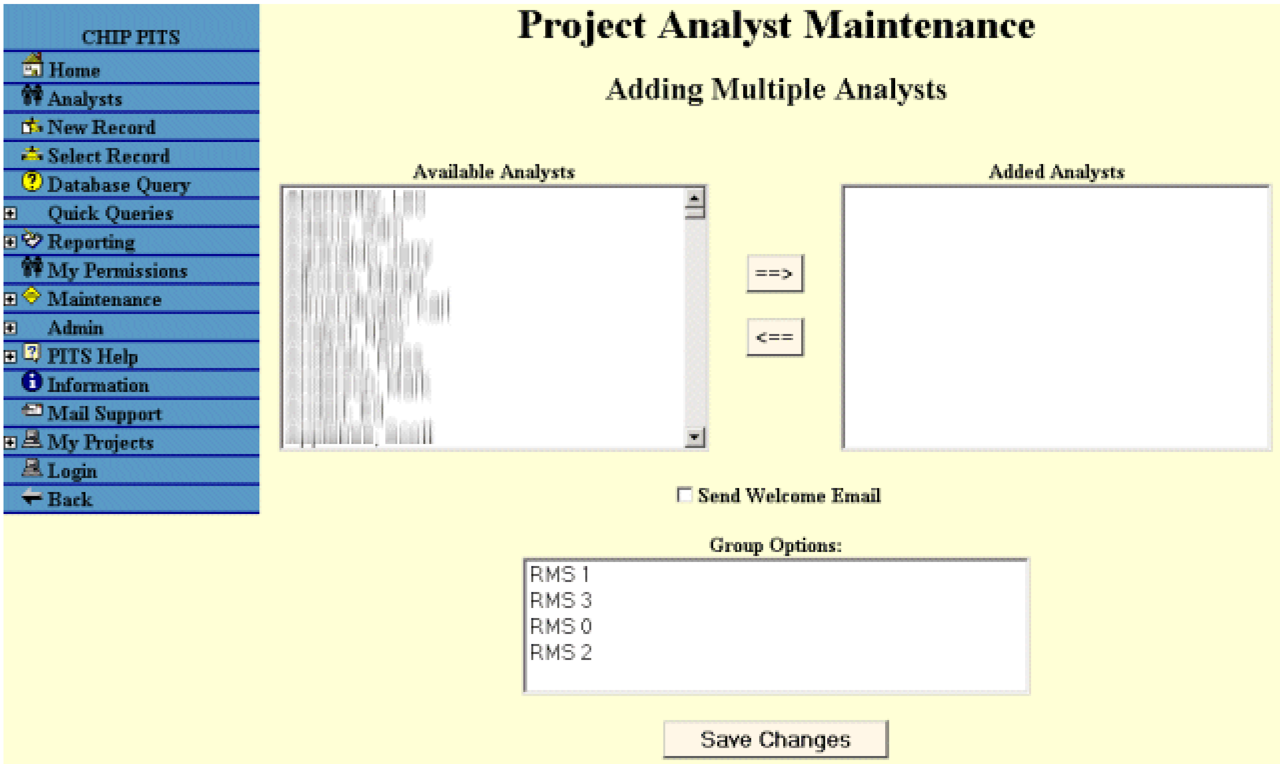

Figure 33 - Add Multiple Analysts

9.5 Groups

Clicking on the "Groups" menu item under the “Maintenance” menu item on the Navigation Menu will display the interface that allows the user to add, remove, edit, and manipulate permission groups. Groups are used to assign specific limited permissions to different user classes within each project.

To open the Group Maintenance page, click "Maintenance", then "Groups" on the Navigation Menu.

On the Group Maintenance page, you can do multiple things. You can add or remove users to existing groups, switch between projects to manipulate groups, create new groups, edit existing groups, or delete groups.

The "Projects" select box displays all of the projects you have permission to modify groups for. The default is the project you are currently logged into. You can switch between projects by clicking on the down arrow and highlighting another project name.

The "Project Groups" box contains all group names that currently exist within the project specified in the "Projects" select box. Select a group from this box to display a list of current analysts assigned to this group. These analysts will show up in the "Group Analysts" box.

To remove an analyst from a selected group, first make sure a group is selected above. Then, select an analyst from the "Group Analysts" box and click the "Remove Analyst" button.

The "Project Analysts" box displays all analysts that can log into the current project. To add an analyst to a group, the analyst must first be added to the project. See Adding Analysts for how to do that. Once the name exists in the "Project Analysts" box and a group is selected above, select the analyst you wish to add, then click the "Add Analyst" button. The name will automatically show up in the "Group Analysts" box.

Click the "Save Changes" button to complete the transactions mentioned above.

To edit a selected group, click the "Edit Selected Group" button. See Editing Group Permissions for more information.

To delete a group from the project, click the "Delete Group" button. This action cannot be undone.

To create a new group, click the "Create New Group" button. See Editing Group Permissions for more information.

To modify group permissions:

1. Click on the "Groups" menu item under the “Maintenance” menu item on the Navigation Menu.
2. Select the desired group to edit from the Project Groups List.
3. Click on "Edit Selected Group" button.
4. Modify group permissions.
5. Click on "Save Group Information" button to save any changes.

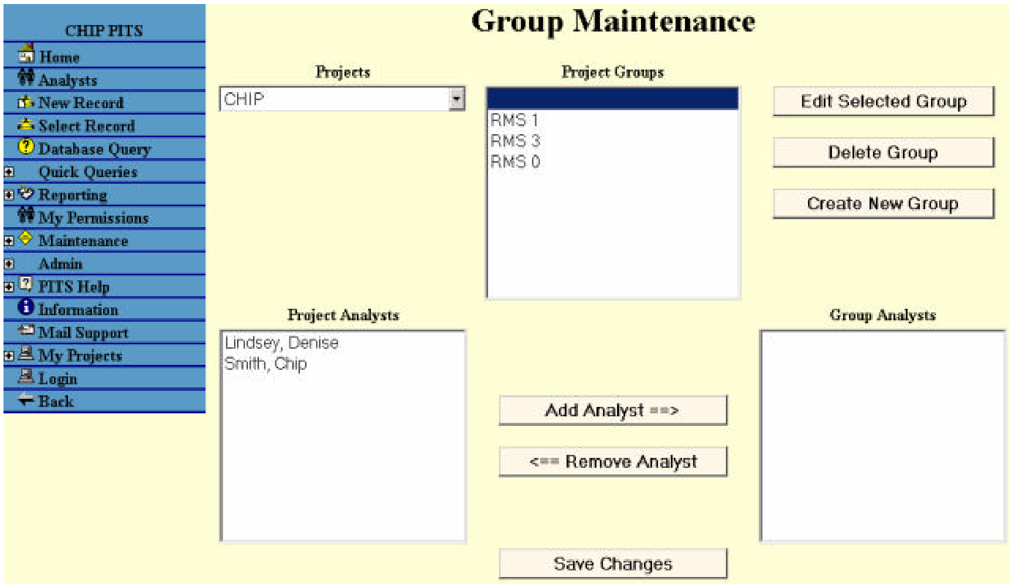

Figure 34 - Group Maintenance

9.6 Documents

The Document Maintenance page allows the user to create new documents, edit existing documents, and delete existing documents. The following text shows how to set up Documents within PITS projects:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Documents" menu item.
3. Click the "New" button to create a new document or select an existing document from the "Documents" list. If another field filters the documents field, you will first have to select a value for the filtering field.
4. To edit an existing document, select the document from the list.
5. If you are creating a new document or editing an existing document, make changes to the "Title", "Date", "Revision", "Type", and "Display" fields as necessary and click the "Save" button to save your changes.
6. If you are deleting an existing document, simply click the "Delete" button.

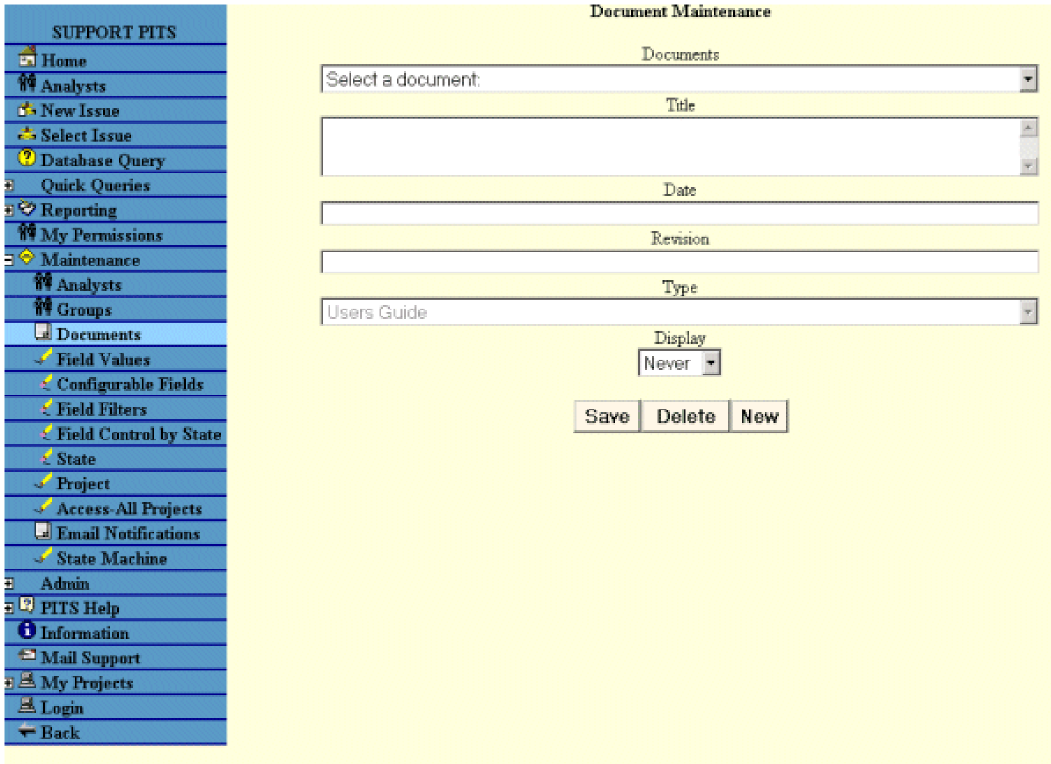

Figure 35 - Document Maintenance

9.7 Editing Group Permissions

This page allows for complete control of the actions a member of this group can perform. These permissions control when a member of the group can edit a TIM, what transitions can be performed, and how the user can interact with PITS.

Note: Users can be members of multiple groups. The permissions from each group are combined and in the case of conflicting permissions, the highest permission will preside.

Group Transitions: Group transition permissions define whether a user is allowed to change the current state of a TIM and to what states the user may change the state to.

Group Editable States: Group editable state permissions define in what states a user may edit a TIM based on the current state of the TIM.

Group Permissions: Group permissions control how the user can interact with PITS. The following permissions are available:

- Create\Edit Own Resolutions
  - Ability to create resolutions and edit resolutions owned by the given user
- Edit Any Resolutions
  - Ability to edit resolutions owned by other users
- Create\Edit Own Relationships
  - Ability to create relationships and edit relationships owned by the given user
- Edit Any Relationships
  - Ability to edit relationships owned by other users
- Edit Other Issues
  - Ability to edit TIMs originated by other users
- Field Maintenance
  - Ability to edit and define configurable fields
  - Ability to create and edit field filters
  - Ability to edit field control by state settings
- Analyst Maintenance
  - Ability to add analysts to the given project
- Field Value Maintenance
  - Ability to edit and define configurable field values
- State Maintenance
  - Ability to create states and edit state transitions
- Document Maintenance
  - Ability to create and edit document entries
- Group Analyst Maintenance
  - Ability to assign members to a group
- Group Editing Maintenance
  - Ability to edit group permissions
- View Administrative Statistics
  - Ability to view page hit statistics
- Change Email Notifications
  - Ability to control email notifications
- Edit Project
  - Ability to edit project settings, such as name, prefix, etc…
- Approve Revisions
  - For use with the revision approval system, allows the user to approve revisions to allow for users with the next permission to see the approved item.

- View Approved Revisions Only
    - For use with the revision approval system, user cannot create/edit TIMs, relationships, and resolutions. The user can only view the contents of TIMs that have been approved for their viewing.
- Issue Maintenance
    - Ability to delete issues.
- Rollback Own Issues
    - Ability to rollback TIMs owned by the given user.
- Rollback Any Issue
    - Ability to rollback TIMs owned by any user.

Group Saved Query: By assigning a saved query to the group, members of the group will only be able to view and edit TIMs that result from application of the saved query. This feature, for example, can be used to prevent members of the group from seeing TIMs that have a current state of draft.

To modify group permissions:

9.8 Field Values

The Field Value Maintenance page allows the user to edit the list of values associated with a field. The order in which the values are displayed to the user can also be specified. You will only be able to remove a value from the list if there are no TIMs in the project using that value.

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Field Values" menu item.
3. Select the field whose values you want to edit from the "Fields" list. If there are no fields in the list, you must first create fields from the Configurable Fields Maintenance page.
4. If you wish to add new values to the list of values for the field, select the number of new values you wish to add from the next dropdown list.
5. For each value in the list, you can specify the "Display" setting. This setting allows you to hide field values you no longer wish to use. The settings and their effect are as follows:
    - "Always" will display the field value on all pages.
    - "Query" will display the field value on the query page only.
    - "Never" will hide the value from all screens in PITS.

*Note that if any TIM has the value selected, it will always be displayed or included in the list when viewing that TIM.

6. Edit the "Value" and "Description" attributes of each value in the list as desired.
7. Use the "Up" and "Down" arrow buttons to set the order that list values will be displayed, or use the radio buttons on the right side of the page to automatically order the values alphabetically.
8. After editing the list of values, click the "Save Changes" button to save your changes to the database.

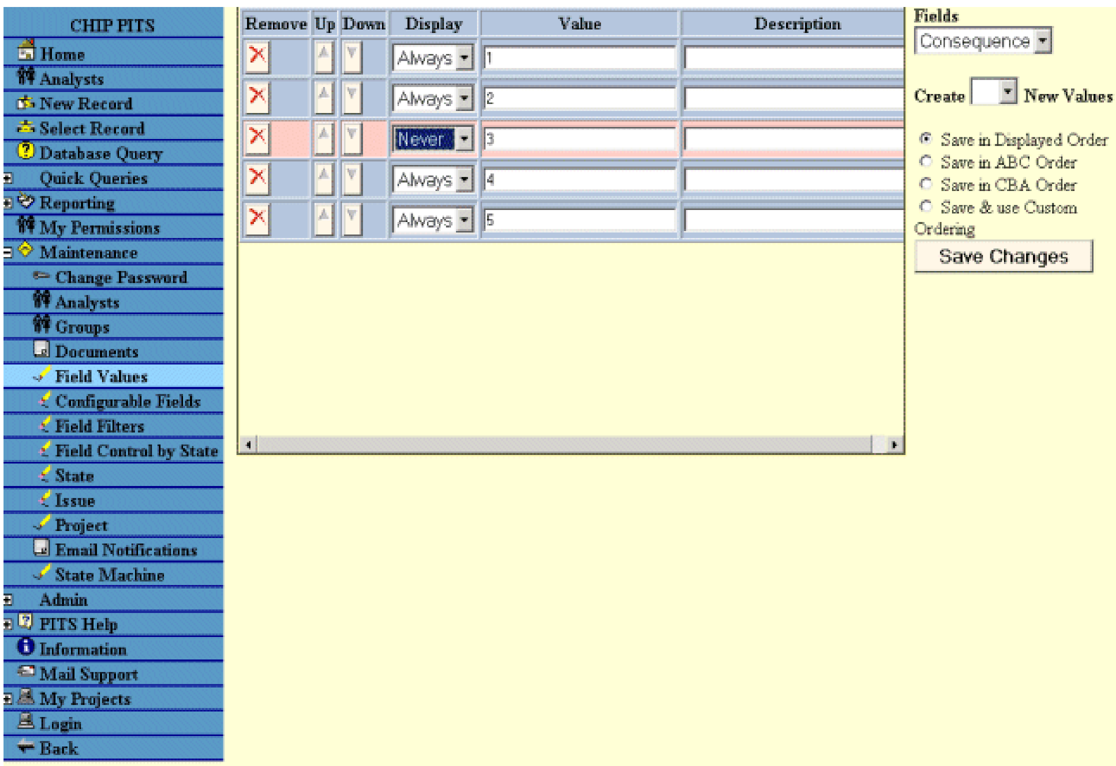

Figure 36 - Field Value Maintenance

9.9 Configurable Fields

The Configurable Fields Maintenance page allows the user to create and edit the fields that describe a TIM for the project. This page also allows the user to configure the appearance of the fields on the TIM Form by specifying the field type, field width, and field ordering. Perform the following steps to set up Field Values:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Configurable Fields" menu item.

3. If you are creating new fields, select the number of fields to be created from the dropdown list at the top of the page.
4. Select the type of field you are going to add or edit.
5. For each field in the list you can:
    - Remove the field if it has not been used in any TIMs in the project.
    - Use the "Up" and "Down" arrow keys to set the order that the fields will appear on the TIM Form.
    - Set the "Hidden" setting to indicate if the field should be visible.
    - Set the "Mandatory" setting to indicate if a value has to be entered for the field.
    - Set the "Quick Search" setting to indicate if the field is available for text searches from Quick Search menu. (Text Fields Only)
    - Enter or edit the name of the field in the "Name" textbox.
    - Enter or edit the width of the field in the "Width" textbox (if the field is not a Long Text field).
    - Enter or edit the description of the field in the "Description" textbox.
6. If you have created new fields, you must select the field type from the "Type" list. This option is available only if the new field is not a Long Text field. The options for field types are:
    - Analyst – A select list of analyst names from which the user can select only one. PITS can be configured to send notification emails to the selected analysts.
    - Date – A textbox that allows the user to enter only a date value.
    - Free Text – A textbox that allows the user to enter free text.
    - Select – A select list containing arbitrary values from which the user can select only one.
    - Multi Analyst – A select list of analyst names from which the user can select multiple values. PITS can be configured to send notification emails to the selected analysts.
    - Multi Select – A select list containing arbitrary values from which the user can select multiple values.
7. After editing the fields, you can save your changes by clicking the "Save Field Settings" button. If you wish to discard your changes, click the "Cancel Field Settings".

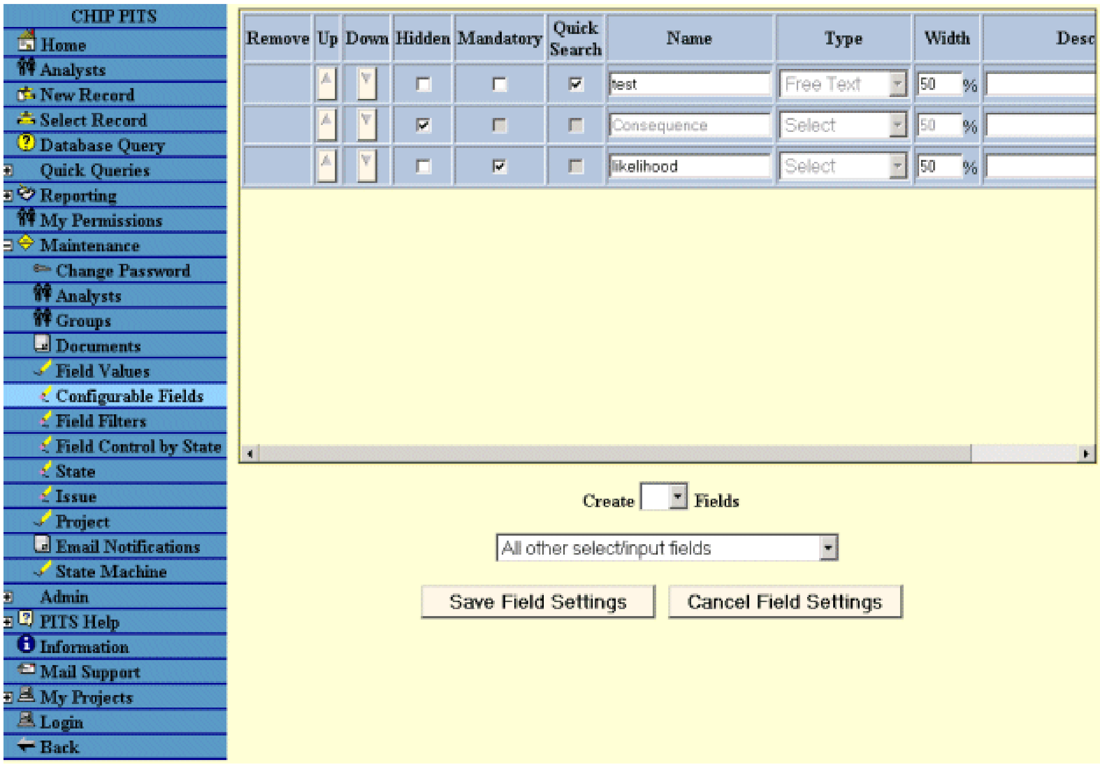

Figure 37 - Configurable Fields Maintenance

9.10 Field Filters

The Field Relationship Maintenance page allows the user to define filtering relationships between any select list fields. This feature allows the values displayed in one select list to be dependent on the value(s) selected in another select list on the TIM Form. To set up Field Filters, following the steps listed below:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Field Filters" menu item.
3. If you wish to create a new filter relationship, click the "Add" button. If you wish to edit an existing filter relationship, select the relationship from the "Relationships In Use" list, click the "Edit" button, and skip to Step 6.
4. Select the "Parent" and "Child" field in the filter relationship. The values displayed in the child field will be displayed based on the selected value(s) in the parent field.
5. Click the "Save" button to save the new filter relationship.
6. From the list of parent field values, select the value that will filter the child field.

7. Using the "->" and "<-" buttons, move the child values that should be available when the parent value is selected to the list of linked values.
8. Click the "Save" button when done, or click the "Cancel" button to discard your changes.

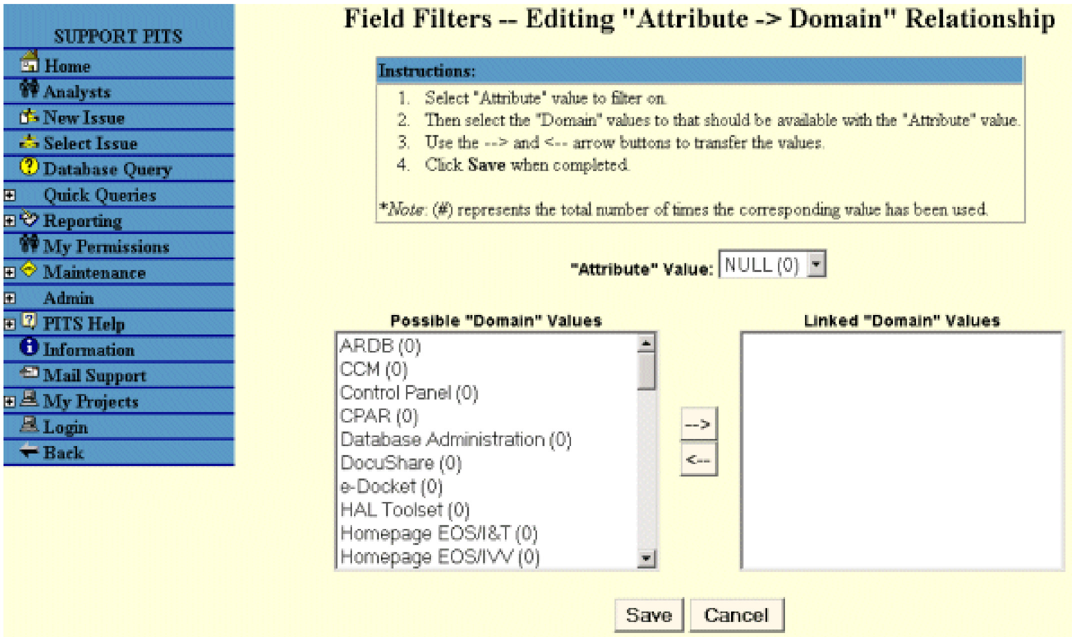

Figure 38 - Field Filter Maintenance

9.11 Field Control by State

The State-Field Maintenance page allows the user to specify fields that should be disabled or required depending on the current state of the TIM. When the TIM is transitioned to a given state, each field will be disabled or required based on ‘Field Control by State’ settings. The following text shows how to set up Field Controls:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Field Control by State" menu item.
3. From the "State" list, select the state for which field settings will be specified.
4. Select the field(s) to disable or require by moving them from the "Fields" list to the "Disabled Fields" and "Required Fields" lists on the right side of the page. Move the fields using the "->" and "<-" buttons.
5. Click the "Save" button when done, or click the "Cancel" button to discard your changes.

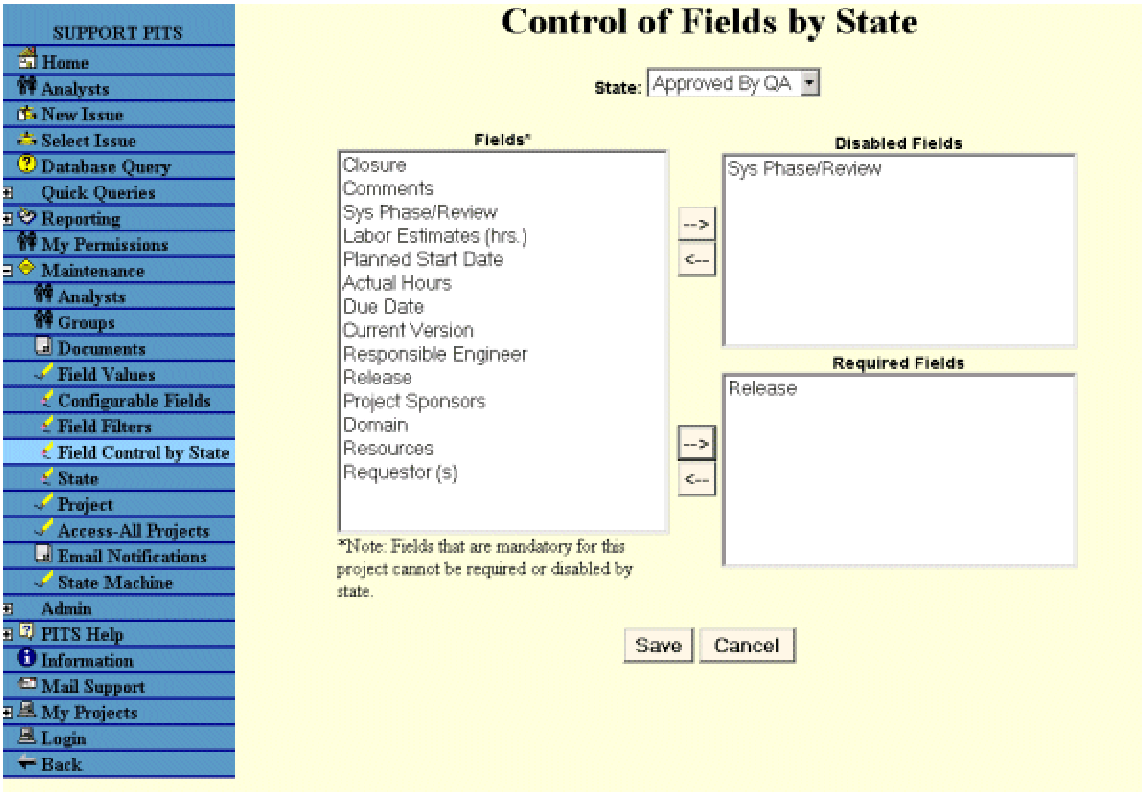

Figure 39 - Field Control by State Maintenance

9.12 State

The State Maintenance page allows the user to define the possible states of TIMs in the project. The transitions between states are also configured on this page. To perform State Maintenance, perform the following steps:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "State" menu item.
3. From the "Select State" list, select the state you wish edit transitions on.
4. To add transitions: Select the state to which a transition should occur to from the "Add Transition To" list and click the "+" button.

   To remove transitions: Select an unused transition from the transition list and click the "X" button.

5. Click the "Save Transitions" button to save the defined transitions.
6. After saving your information you must go to the Group Maintenance page in order to grant access to specific permission groups to make the new state transitions. Click on the "Edit Selected Group" button to assign these permissions.
7. To edit an existing state, select the state from the "Select State" list and click the "Edit State" button.
8. In the window that appears, make changes to the "State Name" and "State Description" as desired and click the "Save" button to save your changes.
9. To delete an existing state, select the state from the "Select State" list and click the "Delete State" button.

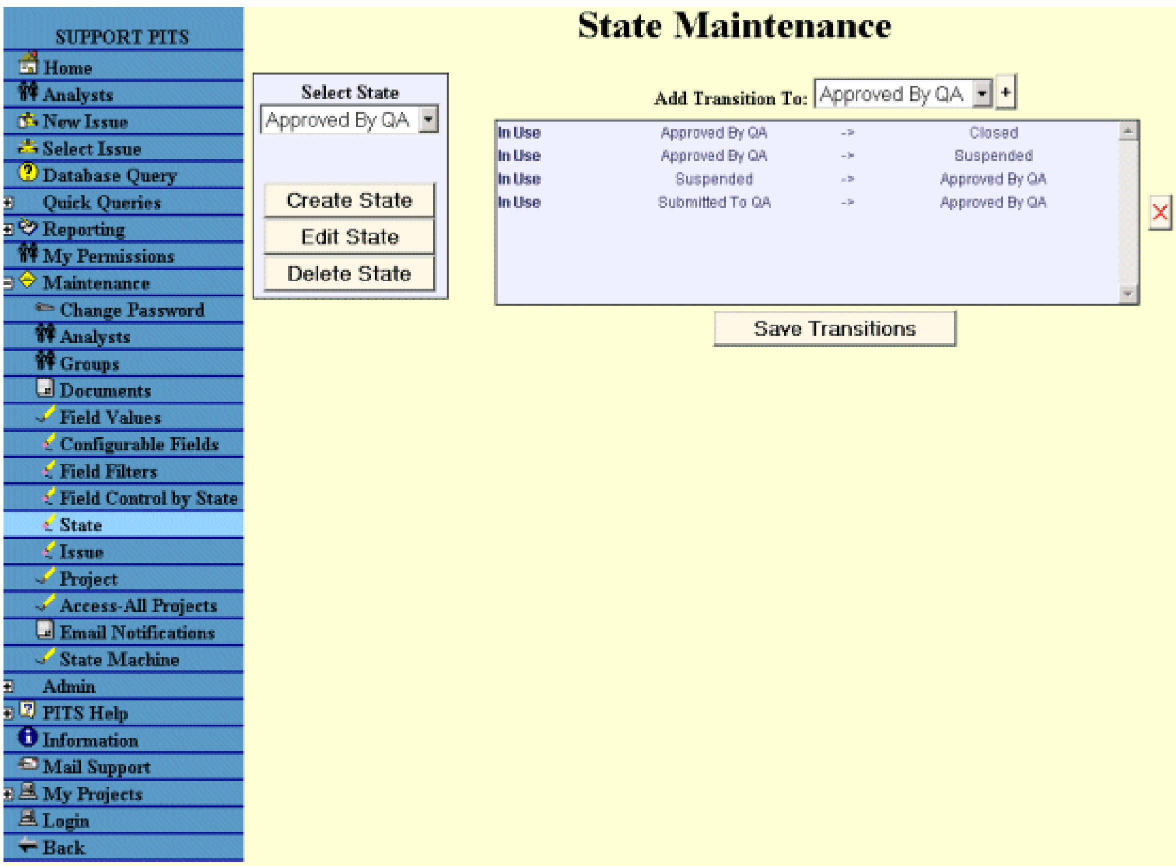

Figure 40 - State Maintenance

9.13 TIM Deletion

The issue deletion page allows for deletion of one or multiple TIMs within the given project. The process will remove all trace of the given TIM(s) from PITS. This functionality is only available to users with the "Issue Maintenance" permission. To delete TIMs from the project, follow the steps listed below:

THIS PROCESS IS NOT REVERSIBLE

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Issue" menu item.
3. Enter the TIM ID of the TIM to delete or click on the link to select multiple issues.
4. Click on the "Delete Issue(s)" button.
5. Confirm that the TIMs to be deleted are the correct ones listed by clicking on the "Delete Issue(s)" button.
6. Confirm a final time and commit the process by clicking on the "OK" button of the dialog box that appears.

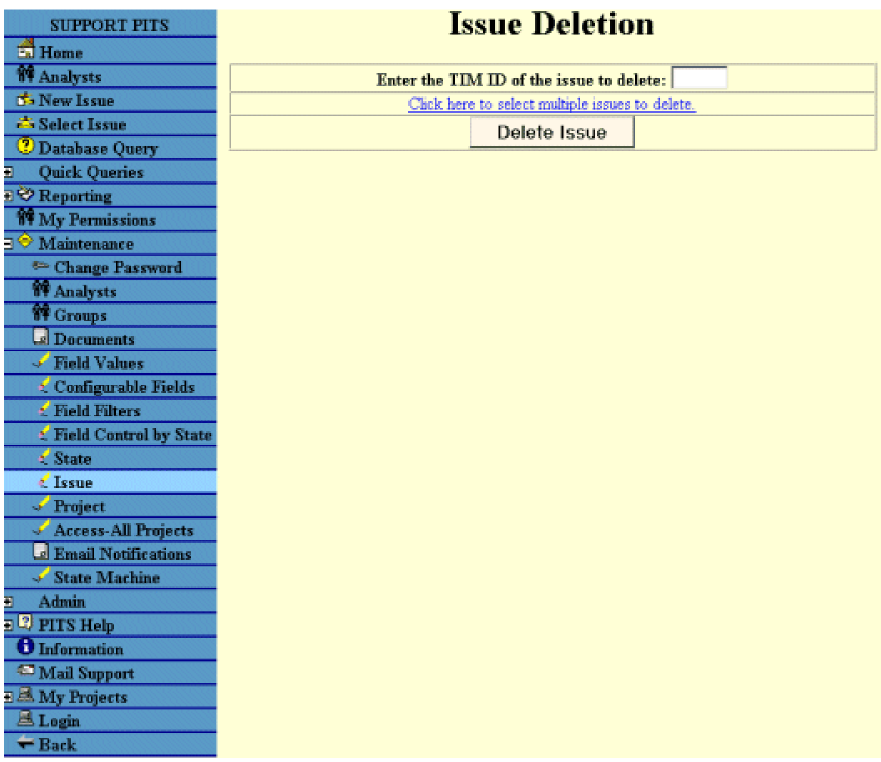

Figure 41 - TIM Maintenance

9.14 Orthogonal Defect Classification

ODC in the maintenance menu stands for Orthogonal Defect Classification. This menu item helps a project manager add the fields recommended for analysts to start collecting ODC data on issues they enter.

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "ODC" menu item.
3. From the beginning screen click the "Yes" button if you wish to add ODC.
4. The second screen will compare any matching fields and field values and ask if you want to keep your descriptions (the default is to replace current descriptions)
5. You also have the option to keep or hide your current field values (the default is to hide)
6. When you click on "Implement ODC" you will be asked one final time if you want to implement. If you choose "Yes", you will be directed to the addition and feedback screen
7. You will be given feedback as to what is being updated and inserted from this screen. Any errors will result in all progress being rolled back and no changes to your data.

9.15 Project

The Project Maintenance page allows the user to create new projects and edit existing projects. Perform the following steps to perform Project Maintenance:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click the "Project" menu item.
3. To edit the current project, click the "Edit Project" button. To create a new project, click the "Create Project" button.
4. Make changes to the project information as necessary. The following attributes describe a project in PITS:
    - Project Name – A text field that represents the name of the project (often a project acronym).
    - TIM start number – The starting number at which to start incrementing when generating IDs for TIMs.
    - Select TIM prefix – The project prefix for which TIMs will be identified across projects.
    - Refer to an Issue as – A word to refer to TIMs within the project.

- Refer to the Subject Field as – A word to refer to the subject field within the project.
- Display Document field checkbox – When clicked, the document field will be available for use within the project.
- Document Filter Selection – Selecting a field from the selection list will allow all documents to be filtered on that field’s value.
- Use Revision Approval System – The revision approval system allows control of TIM changes prior to being viewed by certain user groups. Checking the box will activate the system.
- Standard Field Descriptions – The standard field description boxes allow definition of field descriptions for PITS system created fields

5. Click the "Save" button to save the changes to the project.

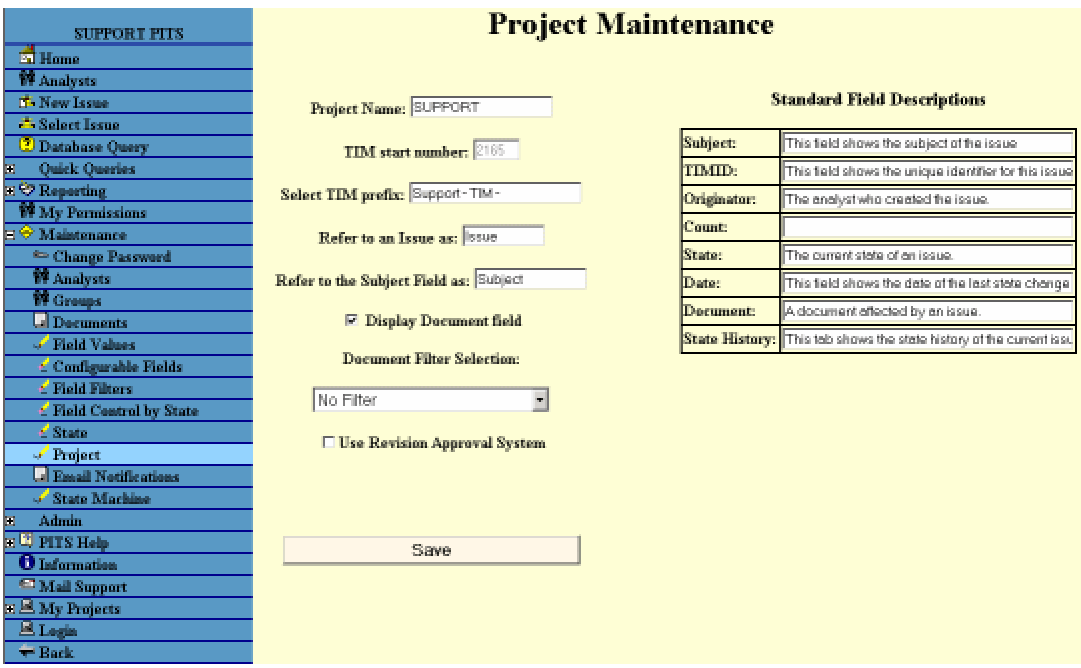

Figure 42 - Project Maintenance

9.15 Email Notifications

The Email Notification page allows the user to choose the analyst fields to be notified when a TIM is updated. To specify custom email settings, click on the "(Edit)" link. To specify user exceptions click on the "Define" button. The following shows how to set up Email Notifications:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Email Notifications" menu item.
3. For each analyst field in the "Notification Field" list, select the radio button that defines when email notifications should be sent to the analyst(s) identified by the field.
4. Click the "Save" button to save the email notification settings.

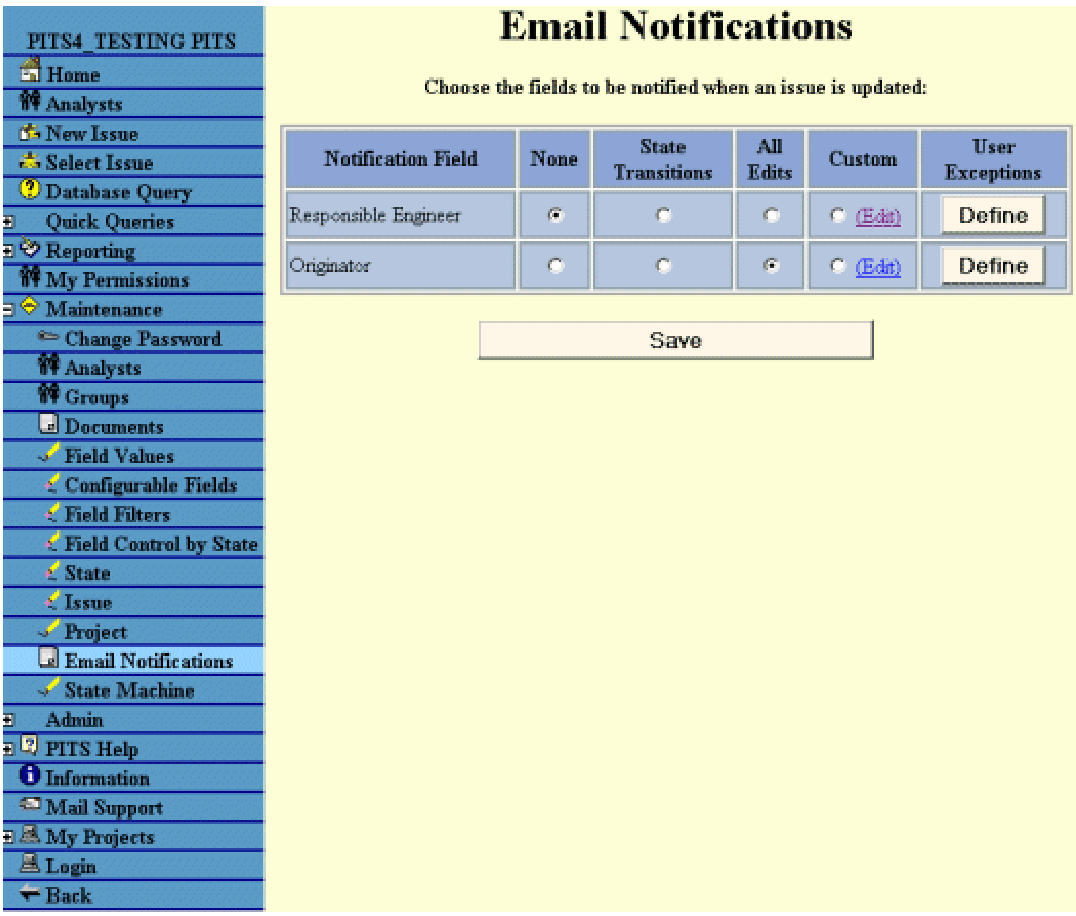

Figure 43 - Email Maintenance

9.16 Email User Exceptions

If desired, emails notifications can be disabled for a given field, event, and user. To set up Email User Exceptions, follow the following steps:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Email Notifications" menu item.

3. Click the "Define" button on the row of the field that you wish to specify user exceptions on.
4. Select the user's name from the "Choose User" list.
5. Check boxes in the event matrix for events that you do NOT want the user notified via email. (Boxes grayed out are already set to not send emails to users for the given field and event.)
6. Click the "Save" button.

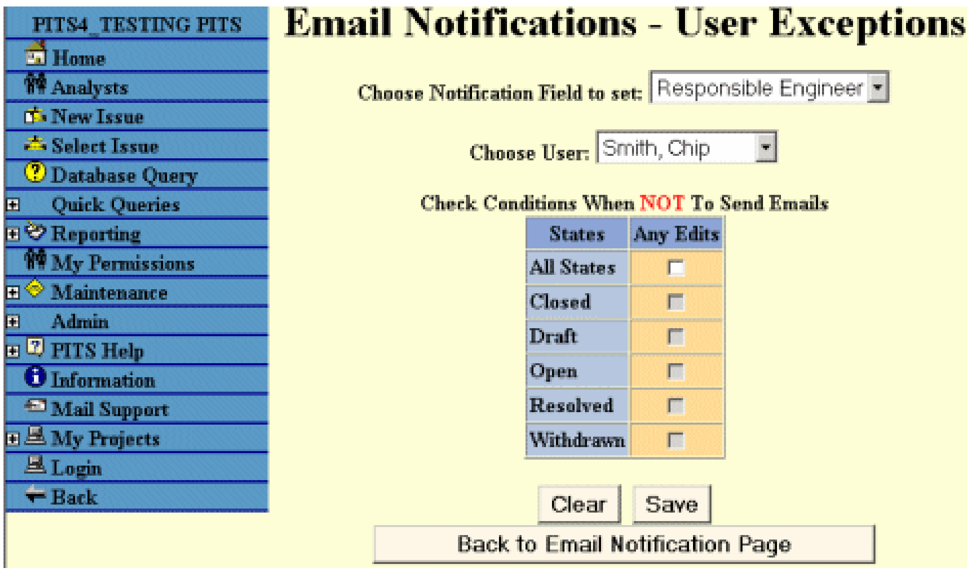

Figure 44 - Email Constraints Interface

9.17 Custom Email Notifications

The Custom Email Notifications Maintenance page allows the user to specify, with finer control, when emails will be sent to users. Emails can be sent based on certain field changes or when TIMs enter particular states. The following shows the steps to using the Custom Email Notifications functionality:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "Email Notifications" menu item
3. Click on "(Edit)" link for a specific notification field to specify custom email notification settings for that notification field.
4. Select any additional fields that need to be displayed in order to specify the conditions to send the notification email and click the "ADD" button to add those fields to the display.
5. Use the checkboxes to specify the conditions that must be met in order for an email to be sent.

- Use the "Any Edits" column boxes to send emails whenever any edit is made to any field when the TIM is in the given state.
- Use "State Transitions" column boxes to send emails whenever a TIM is moved from some other state into the state specified by the row.
- For each additional field displayed, use the boxes in that field's column to send emails whenever any edit is made to that field when the TIM is in the state specified by the row.

6. Click the "Save" button to save your email notification settings. Clicking the "Clear" button will uncheck all selected checkboxes.

Figure 45 - Custom Email Notifications Interface

9.18 State Machine

The View State Machine page opens a new window containing a Java applet that displays a graph of all possible state transitions for TIMs within the project. *NOTE: only available on IE Browsers. To run the State Machine, perform the following steps:

1. Click on the "Maintenance" menu item in the Navigation Menu.
2. Click on the "State Machine" menu item.

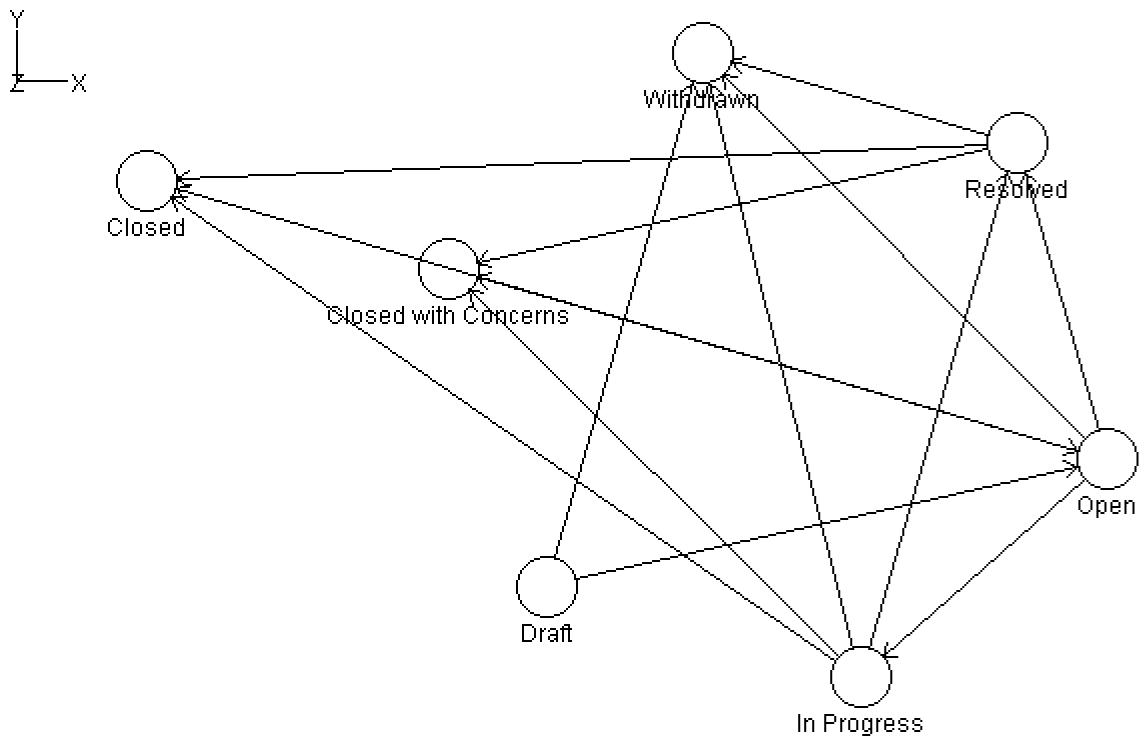

Figure 46 - State Machine

9.19 Customizing the TIM Form

The design of the TIM form can be customized through the use of field ordering and setting the widths of the configurable fields displayed. A general approach follows below; see Configurable Fields for more information.

1. Click on the “Maintenance” menu item in the Navigation Menu.
2. Click on the “Configurable Fields” menu item.
3. Select "All other select/input fields" from the dropdown list.
4. Define the order in which the fields are to be displayed on the Tim Form by using the up and down arrows. Items toward the top of the screen will appear before items toward the bottom of the screen.
5. Set the widths of each individual field by entering a value between 1 and 100 in the width column. (The field widths of a single row must total 100.)
6. Click "Save Field Settings"
7. View your changes by opening the Tim Form.

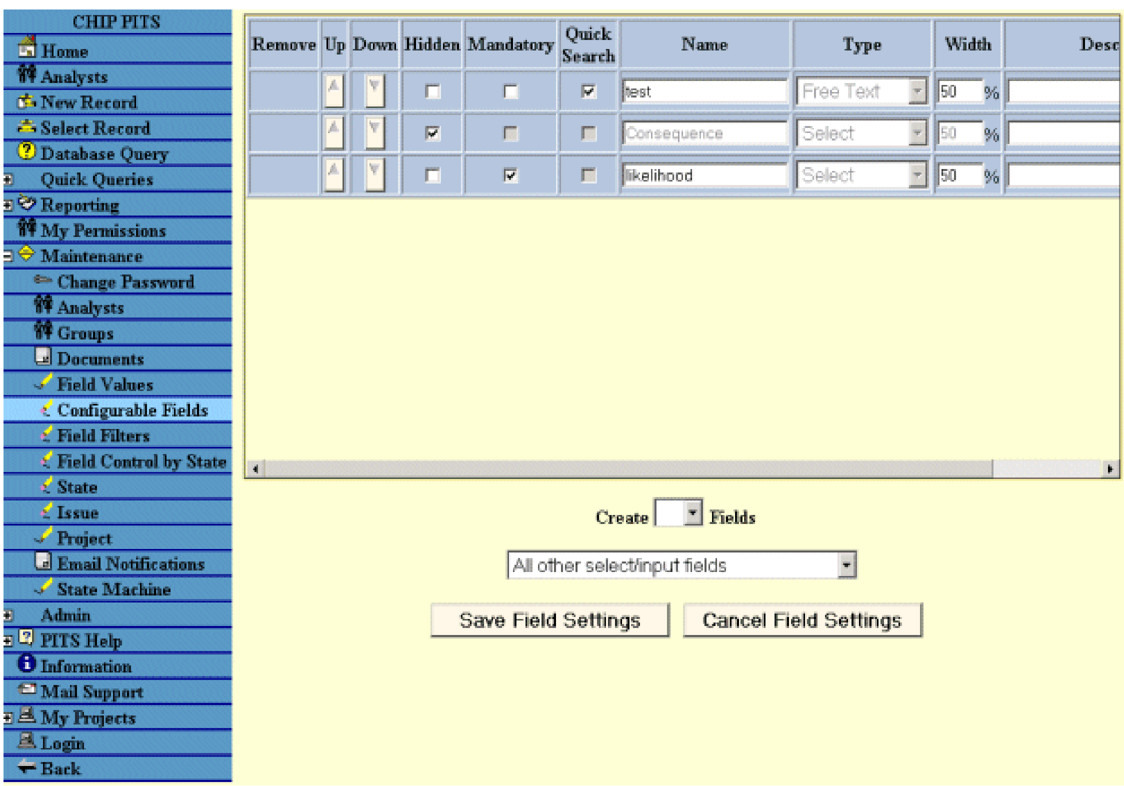

Figure 47 - Customizing the TIM Form Interface