

TDC Deployment and Getting Started Guide

This document is designed as a best-practices checklist of the steps and the order in which these steps should be executed for a successful deployment of the TDC program. This document is not intended to replace the TDC Administrator's Guide or User's Guide and is designed to work hand-in-hand with the TDC documentation.

Although a brief overview of each step is provided, the intention is for the reader to locate additional information about each step in the TDC product documentation.

Deployment Checklist

Please follow the next steps in the order they appear in this document.

1. Identify a SQL Server for the TDC Database

TDC stores all information in a SQL-based database. If you don't already have an installation of Microsoft SQL Server, you will need to identify a server that will house the SQL Installation and install one of the following SQL Servers:

- SQL Server 2005
- SQL Server 2005 Express Edition (free download)
- SQL Server 2000

2. Setup TDC program

Simply run through the setup wizard to install the TDC program and follow the instructions. The entire program will be installed in less than five minutes.

3. Create a new TDC Database

Create a new TDC empty database with your SQL manager database. The information that you will need to provide to TDC later will include your SQL Server name and authentication information (user name and password).

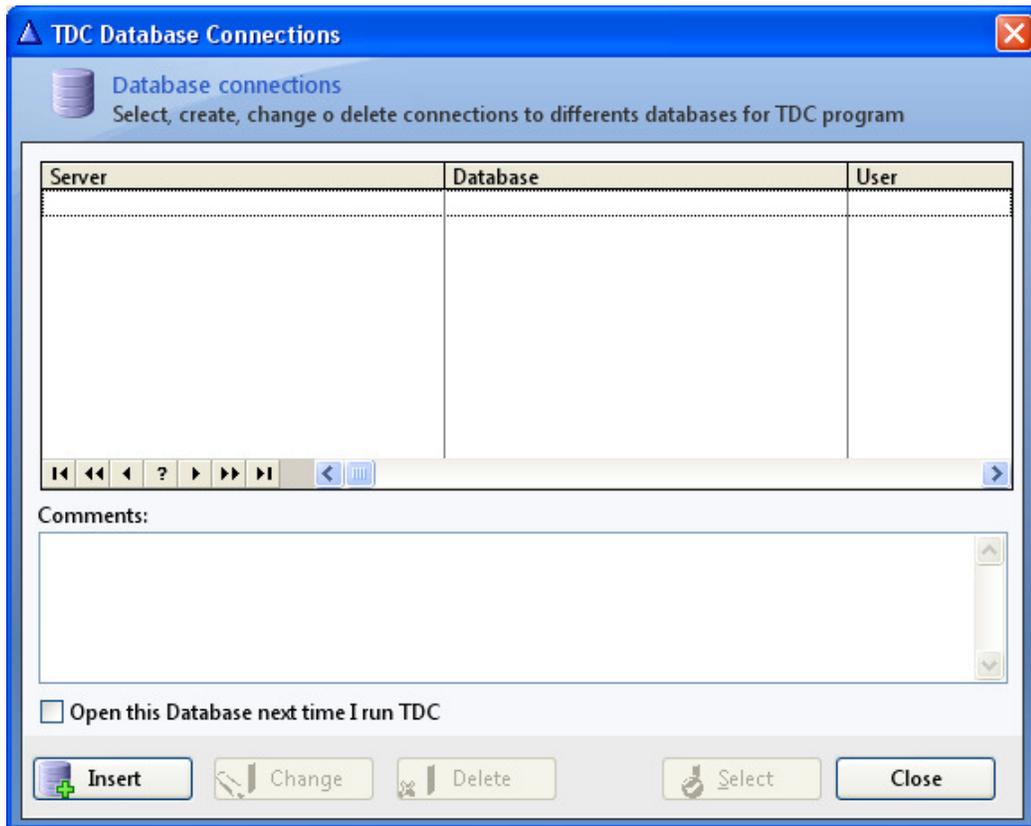
TDC can create all the necessary objects (tables, indexes, triggers, views and store procedures) into the new database by connecting to a SQL Server on your network.

4. Install the TDC email service

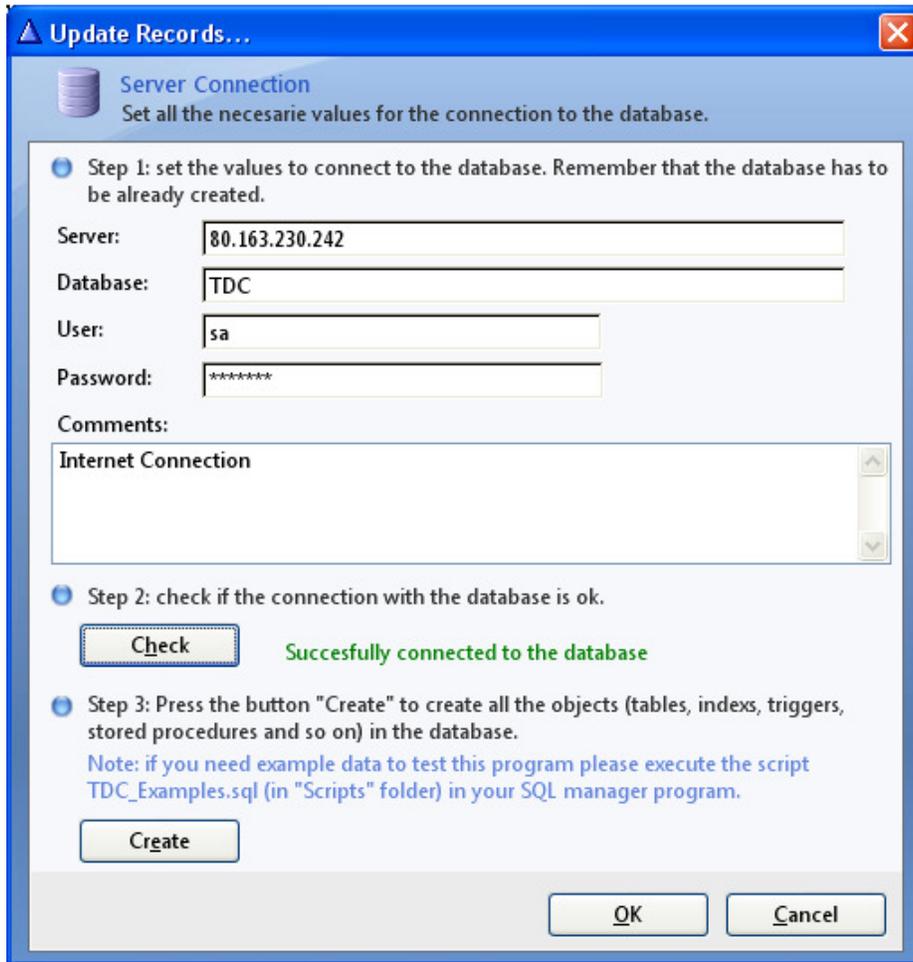
The TDC email service is necessary for email notifications. It simply enables the ability for TDC to check if there are e-mails in the queue to send to the recipients. The notifications are for the internal users of your company and for the contacts related with your customers.

5. Run TDC program

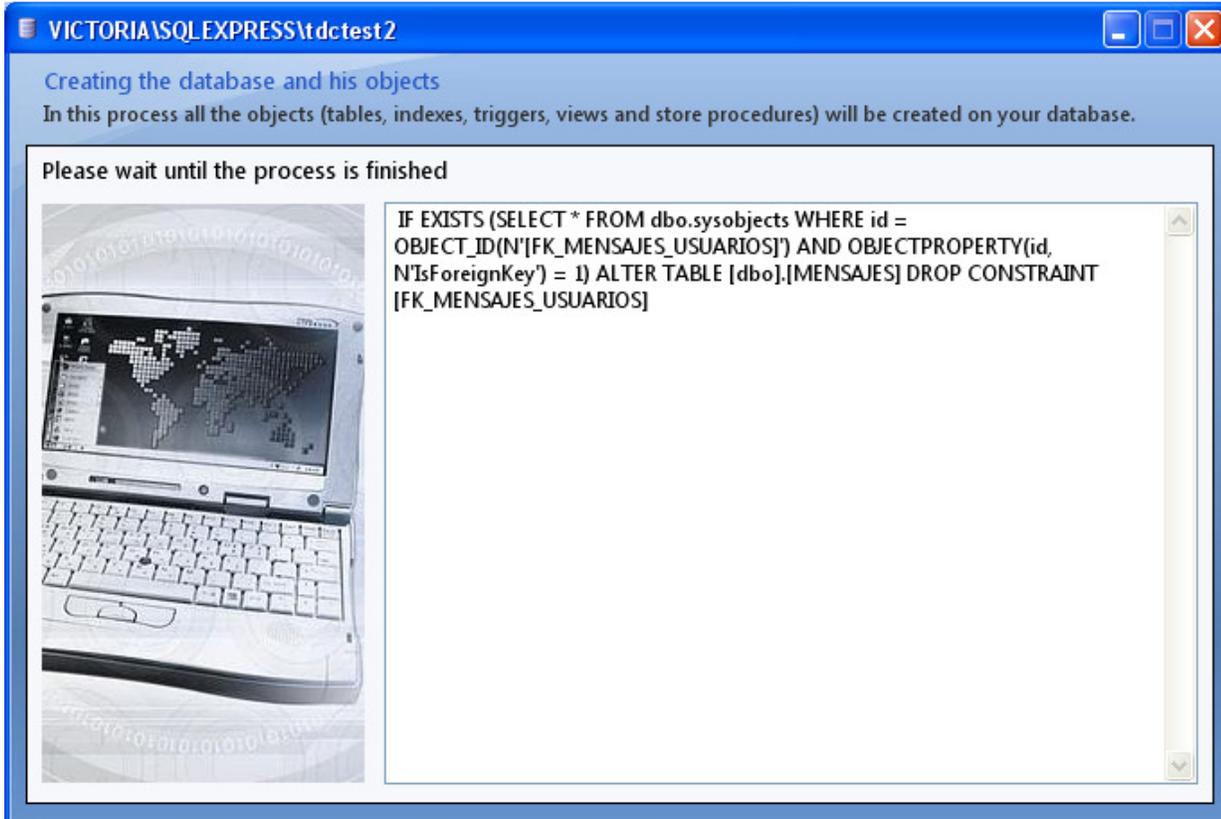
The first window you will see is this one:



This window allows you to create, change or delete connections to different databases. You will have to create at least one connection to the database you have already created in the step 3. Please press the button "Insert". After that you will see another window to provide all the necessary information to connect to the database and create his objects.



First you will have to provide the information of the server name (here you can use the server name or the IP number of the server), database name, user and password to connect. Then you have to press the button "Check" and see at the right of this button if the message indicates that connection has been successfully (green message) or not (red message). If everything was ok the button "Create" will be able to press to start to create all the objects to the database. After pressing this button you will see this window:



When the creation of the database objects finish you will be able to select this database connection from the list to run the program properly.

Note: you can add example data to your database in order to test this program. If you want you can run the script called "TDC_Examples.sql" (folder "Scripts" of TDC) on your SQL management program.

Then you will see the user authentication window to login into the program and the first time you will have to use the username "demo" with password "demo". Later on you can change these values of course.



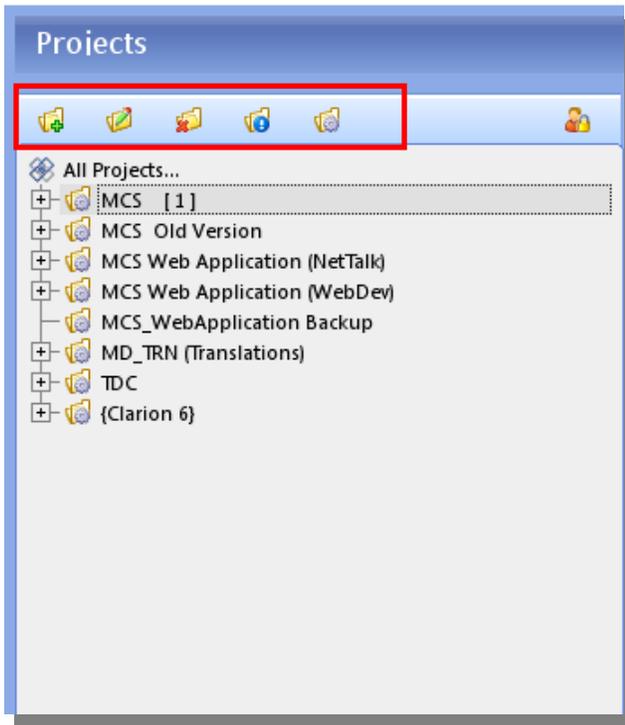
6. Configure Your TDC Installation

Once you have entered to the program the first time you will have to configure your installation.

Configuration tasks include (in this order):

i. Add Projects

Create a core set of projects and sub-projects that you expect to track in the TDC system. You can add and edit projects using the toolbar menu of the project tree hierarchy on the left pane of the TDC user interface:



ii. Setup Security Profiles

TDC manage Security profiles that you can define as you need. This security profiles will let you define which actions will be able to execute your users and which projects they will be able to see in the project hierarchy. You can manage security roles from Options Menu -> Security Profiles.

iii. Create new user groups.

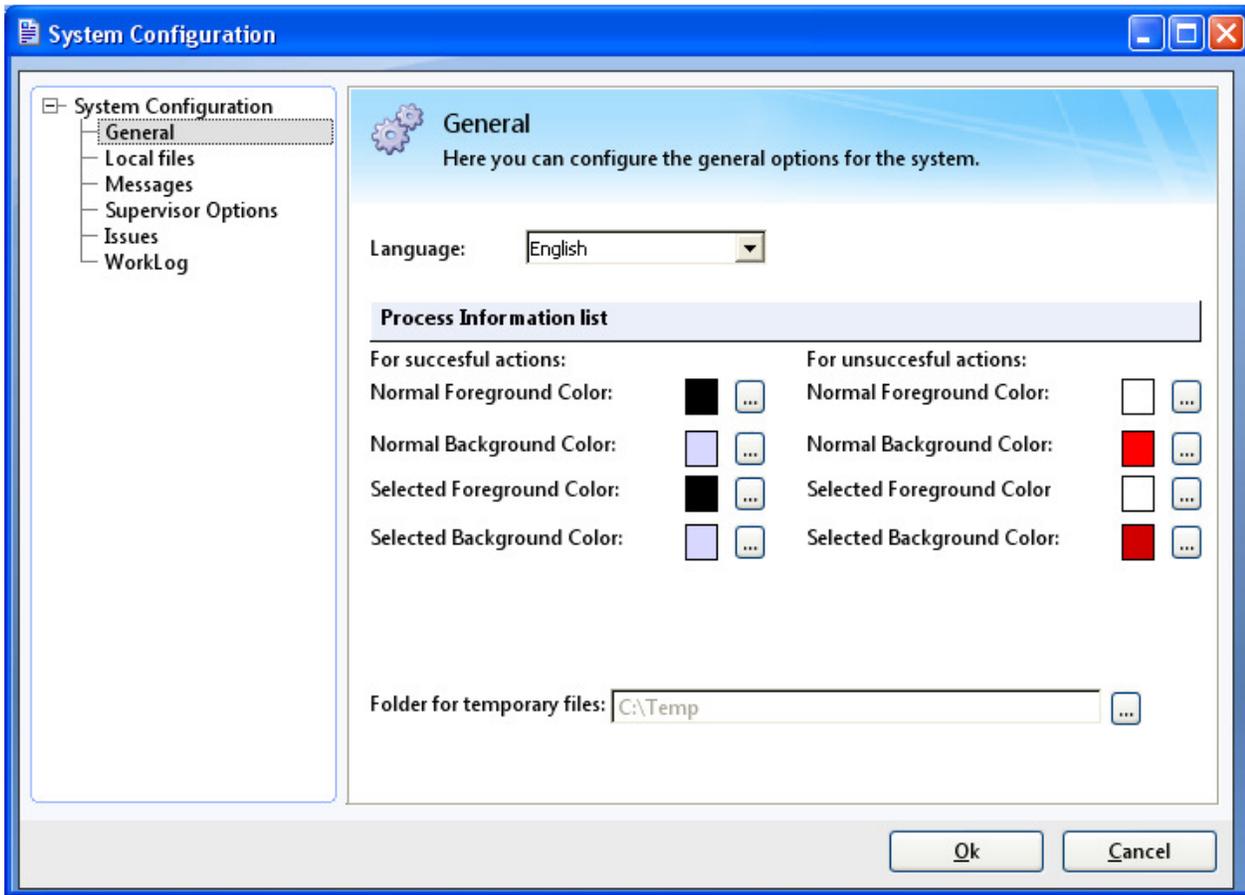
Create new user groups according with you company structure. You can setup the user groups from Lists Menu -> User groups.

iv. Create New Users

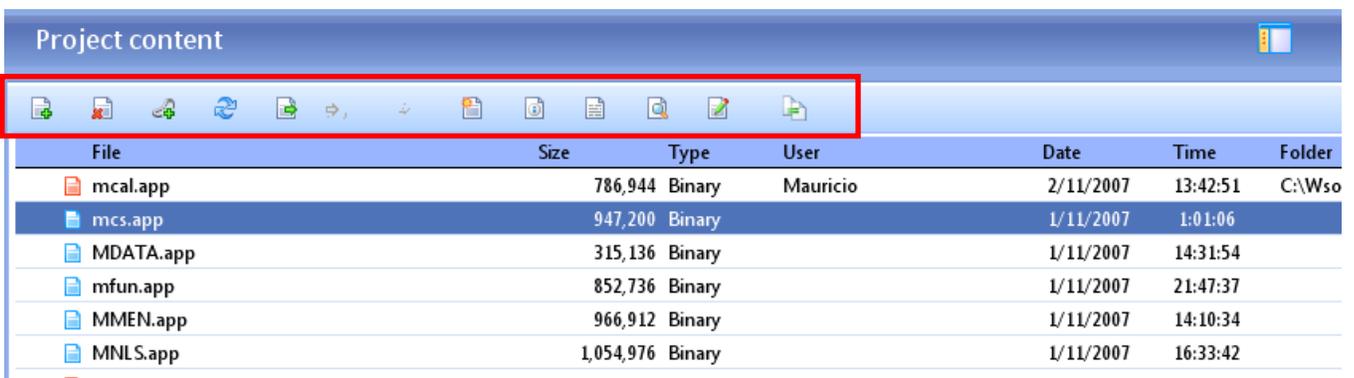
Create new users and remember assign to them a proper "Security profile" and a "user group" also. You can setup the users from Lists Menu -> Users

v. Setup the system configuration

Setup all the general configuration options in order to make the program works properly from the beginning. Go to Options Menu -> System Configuration. You will see a window like this with different options according with different topics in the program. You will have to go thru all of them and set the options.



Note: if you are going to use just the VCS (Version Control System) module now you are ready to start adding files to your projects and check in and check out to them by using the toolbar menu of the project content on the right pane of the TDC user interface:



If you also planned to use the tracking system please follow with the next step to the end of this document.

vi. Manage Lists

If you planned to use the tracking system to keep the track of the issues (bugs, features, questions, changes and incidents) of your products you will have to complete all the necessary information for the selection lists used to report and manage the issues, tasks and so on in the program.

This lists are: types of bugs, statuses, priority levels, severity levels, issue relation types, work logs types, types of tasks, tests cases, customers and contacts, products and versions and so on. To manage these lists go to Lists Menu -> Tracking system, Lists Menu -> Customers and Lists Menu -> Products.

vi. Setup Workflows to Manage Development Processes

You can define different workflows to set automated actions that occur on a given item based on its current state. For example, you can automatically change the assignee of an item, change its priority, make sure a particular person is notified and many other actions based on the workflow step that is selected for an item. You can also setup different workflows for each project if necessary. To manage and define the workflows you have to go Option Menu -> Workflows.

vii. Setup Email Notifications

Email notifications are setup to notify different kind of actions that take place on the program in every part of the tracking system and also in the actions that happen in the VCS. For example when someone report an issue, when an issue is assigned to someone, when someone check in a file into a project, when someone has deleted a file from the project and so on. You can define as many notification lists as you need according with your needs.

To manage the notifications lists first you have to define an account which all the e-mails will be going thru. To do this go to Options Menu -> Mail configuration. Then you can define the notification lists by going to Option Menu -> Notification by e-mail lists. You also can define the format of your notification e-mails (which information will be showed in every email, the subject of the e-mail and the body text) by defining e-mail templates. Go to Options Menu -> E-mail templates.

vii. Required fields and defaults values

TDC provide a way of defining which fields of an issue, task or test case can be edited, and whether the fields require a value or not and assign a default value to them also. These rules can be defined per issues, tasks and test cases. Go to Options Menu -> Required fields and default values to define these rules.

7. Celebrate! You're done!

If you have followed all these steps now you are able to start enjoying TDC program and all its features.

Remember that you can also find several resources about TDC program in our web site like tutorial videos, PDF documents, help files provided with the product and so on.

Our products

Version Control System (VCS)



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Visit us at: www.tdcsoftware.com

Issues Tracking System (ITS)



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