



White paper

## **Play by the roles**

Roles, actions, and controlled issue workflow

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Scoutwest, Inc.

## Play by the roles

You can greatly reduce the possibility of having issues slip through the cracks during development and testing by using a few simple rules while tracking issues. User roles and issue status should be used to dictate the flow of issues from person to person. This ensures that each issue stakeholder has an opportunity to take appropriate action on issues and that none get swept under the rug. A few simple rules of workflow are listed below. You can invent your own steps to fit your workflow needs. Consider how this controlled workflow might improve your development process.

When development and QA issues are assigned status, you can view reports that indicate how many issues fall into each category. This is a wonderful progress indicator that you can use to know when your product will ship, and know if you should allocate additional development or QA resources to certain areas.

Certain roles should be prohibited from deleting, closing, deferring, or otherwise causing an issue to disappear from public view. This ensures that issues are resolved correctly.

Step-by-step actions and status for each kind of issue:

### New issues:

Action	Result of action	Issue status
New issue is created	Automatically assigned to manager of subsystem	New
Triaged by manager		
Assigned to engineer to be worked on	Issue is now owned by engineer	In progress

### Issues finished by engineer:

Action	Result of action	Issue status
Declare resolved by engineer	Automatically send the issue back to the QA manager	Resolved pending review
Review	Assigned to test engineer	Under review
Wait for official build to verify fix		
Verified resolved	Sent back to QA manager	Verified resolved by QA
Close	Issue is hidden	Closed

**Issues that affect documentation:**

Action	Result of action	Issue status
Documentation review	Assigned to documentation manager	Under review
Documentation update	Assigned to technical writer	In progress
Declare resolved	Assigned to manager	Resolved pending review
Wait for official build to verify fix		
Verify resolved	Assigned to QA manager	Resolved
Close	Issue is hidden	Closed

**Issues requested by customers:**

Action	Result of action	Issue status
Issue created	Automatically assigned to manager of subsystem	New
Triaged by manager		
Assigned to engineer to be worked on	Issue is now owned by engineer	In progress
Declare resolved	Back to manager	Resolved pending review
Wait for official build to verify		
Customer is notified of pending product update		Customer notification
Close	Issue is hidden	Closed

**New issues created for an old defect:**

Action	Result of action	Issue status
Mark as duplicate	Issue is hidden	Duplicate
Reopen previous issue	Issue is visible	In progress
Assigned to engineer to be worked on	Issue is now owned by engineer	

**Issues reserved for a later release:**

Action	Result of action	Issue status
Issue created	Assigned to manager	New
Reviewed by manager		
Update proposed version to implement in	Version field updated	
Defer issue	Issue is hidden	Deferred

**Enhancement request routing list:**

<b>Action</b>	<b>Result of action</b>	<b>Issue status</b>
Issue created	Assigned to manager	New
Development signoff	Assigned to marketing manager	Development signoff
Marketing signoff	Assigned to executive team	Marketing signoff
Reviewed by executive team	Assigned to development	Executive signoff
Assigned to engineer to have requirements and spec. written	Issue is now owned by engineer	Writing specification
Attach spec. to issue		

## About Us

Scoutwest, Inc. develops and publishes project management and time tracking products for consulting, manufacturing, government, and general business applications.

Thousands of small to large businesses, in dozens of countries worldwide, trust their mission critical business processes to Scoutwest products. Standard Time® and Standard Issue® work together to offer well-rounded project management solutions.

We specialize in packaged software for timesheets, project management, time tracking, defect tracking, and issue tracking. Standard Time is a web-based timesheet that also runs on Windows, Palm OS, and Pocket PC. It can be used for client billing and task management. Standard Issue is used for bug tracking and general issue tracking.

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