

# OnTime Deployment Best Practices Check List

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 OnTime solution. This document is not intended to replace the OnTime Administrator's Guide or User's Guide and is designed to work hand-in-hand with the OnTime 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 OnTime product documentation.

## ***Deployment Checklist***

### **1. Identify a SQL Server for the OnTime Database**

OnTime 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
- MSDE 2000 (free download)

### **2. Setup OnTime Windows Edition**

The first installation of OnTime should be the OnTime Windows client. Usually, you will want this installation to be on the main administrator's machine that will be responsible for the OnTime deployment. Simply run through the setup wizard to install the OnTime Windows client.

### **3. Create a new OnTime Database**

Using the newly installed OnTime Windows client, create a new OnTime database. The information that you will need to provide OnTime will include your SQL Server name and authentication information.

OnTime can create a new database by connecting to a SQL Server on your network.

**Note:** For SQL authentication information, we highly recommend using "SQL Authentication" (rather than Windows Integrated). This does not affect user authentication with OnTime. Users can still use Windows Integrated authentication to login to OnTime, while OnTime uses SQL Authentication to login to SQL Server. For more information, see the OnTime Administrator's Guide.

### **4. Install OnTime Web Server**

If you plan to have web access to your OnTime database, now is the time to install the OnTime Web Server. You will need to identify a web server that will house your OnTime Web installation. Run through the OnTime Web setup wizard on your OnTime Web Server.

As soon as the setup wizard is complete, the OnTime Web Configuration tool is started and you can configure your database connection. You can use the same database connection that you set up for the Windows client in step 3.

**Note:** For the database Authentication information for OnTime Web Server, choose SQL Authentication. If you choose Windows Integrated Authentication, you will get unexpected results. ASP.NET applications by default run as ASPNET user which will not

have access to your OnTime database. For this reason, we highly recommend using SQL Authentication for the OnTime SQL connection. Again, this does not affect user authentication with OnTime. OnTime users can still use Windows Integrated Authentication to authenticate with OnTime while OnTime uses SQL Authentication to connect to SQL Server.

## 5. Install the OnTime Services

The OnTime Services setup includes three different services that may need to be installed if you plan on using certain functionality in OnTime. The OnTime Services consist of the Alerts Service, the Email Service, and the Email Queue Service.

If you plan on using Alerts in OnTime, or if you want to enable email communications for OnTime, or if you plan on having the OnTime notifications use the Email Queue system, you will need to install the OnTime Services.

The OnTime Email Service is **NOT** necessary for email notifications. It simply enables the ability for OnTime to monitor a POP3 email account, and based on administrative settings, each new email that is received can be part of an OnTime discussion or generate new tickets in the OnTime system.

To setup the OnTime services, you will need to identify a server where the services will be run. This server can be the same server as the OnTime Web server if necessary.

Once you finish running the OnTime Services setup wizard, the OnTime Services Configuration Utility will start and you will need to tell the OnTime Services about the location of your OnTime database. This is the same information you've provided to your OnTime windows and web installations.

At this point you will also need to decide which services you need running and start them up. Use the following table to decide which services you should run:

OnTime Feature	Services Required
Alerts	Alerts Service and Email Queue Service
Email Communication and POP3	Email Service
Email queue for notifications	Email Queue

## 6. Configure Your OnTime Installation

Now that all the components of OnTime are installed, you will need to configure your OnTime installation. For each configuration task, please see the appropriate section in the OnTime user's guide for additional details. 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 OnTime system. You can add and edit projects using the toolbar menu of the project tree hierarchy on the left pane of the OnTime user interface.

### ii. Setup Security Roles & Privileges

OnTime has a base set of security roles and privileges defined that you can use right out of the box, but it's not a bad idea to review these roles and make sure they fit your needs. You can manage security roles from Tools Menu -> Manage Security Roles.

### iii. Setup New User Defaults

New user defaults allow OnTime to guess a new user's default email address and login information based on their first and last name. This

will help make things faster when adding large numbers of new users. You can setup the New User Defaults from Tools Menu -> Manage Users and then select the "Manage New User Defaults" from the toolbar (the right-most toolbar icon).

**iv. Add Your OnTime Users**

Now that you have new user defaults and security roles identified, it's time to add OnTime users. You can add and edit users from the Manage Users section (Tools Menu -> Manage Users).

**v. Add Custom Fields**

After reviewing the built-in fields in the OnTime system for defects, features, tasks and incidents, if you find that you still need to track additional information, you can add your own custom fields. You can add new fields from the Tools Menu -> Manage Custom Fields.

**vi. Manage List Types**

List types provide the options displayed for Status, Severity, Priority and so on. If the built-in OnTime values for these types are not sufficient, you can modify these values to better suit your needs. You can do this from the Tools Menu -> Manage List Types.

**vii. Create Field Templates**

If you suspect the standard add/edit forms in OnTime are not sufficient for your needs, you can setup field templates to customize your add/edit windows. You can setup different field templates for each project if necessary, reorder fields, set required fields and add or remove any fields based on your specific needs. You can also create different field templates for each step of your OnTime Workflow.

**viii. Setup Workflows to Manage Development Processes**

You can use the built-in workflow in OnTime or modify it to meet your needs. Workflow steps define a set of 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. Managing workflows to define new or modify existing workflows is done from the Defects, Features, Tasks or Incidents menu items using the "Manage Workflow" menu option.

**ix. Setup Public Filters**

Public filters allow all OnTime users to access a set of commonly used filters. As your OnTime system starts to take shape, it will become obvious that having a certain set of common filters for all users is a good idea. You can setup these filters as public filters to give all users access to the same set of data.

**x. Setup Email Notifications**

Email notifications are setup to notify the assignee and the person who reports an item when the item is changed in the OnTime system. You can modify the default email notification settings by selecting the Tools Menu -> Email Notifications menu item.

**7. Import Legacy Data**

If you currently have some data that you'd like to import into the OnTime system, export your current data to a CSV file and import it into OnTime. OnTime will allow you to easily map your fields from your CSV file to OnTime fields.

#### **8. Setup Other OnTime Windows Clients**

If you have some users that will use the OnTime Windows clients, now is the time to setup the OnTime Windows client for each of these users.

#### **9. Setup OnTime Customer Portal**

If you plan to provide access to your OnTime system to your end users or customers, now is the time to setup the OnTime Customer Portal. After running through the OnTime Customer Portal Setup wizard, you will also need to configure the Customer Portal. Please see the OnTime Administrator's Guide for more information.

#### **10. User Training**

It's always a good idea to setup small 1-2 hour training sessions for your OnTime users prior to your go-live date. This training session should provide a brief overview of the OnTime product as well as how you expect each user of OnTime to use the system (going over your workflows, security roles, etc.)

#### **11. Celebrate! You're done!**

## **Axosoft Resources to Help**

Axosoft provides a number of resources including Video Tutorials, User Forums, Documentation and FAQs to help you with a smooth deployment of the OnTime product. Please visit the Axosoft Support Center at the following address for more information:

<http://www.axosoft.com/support/default.aspx>

Axosoft Professional Consulting Services can also perform Remote OnTime deployments for your organization. For more information, please visit the Axosoft Professional Services Page:

<http://www.axosoft.com/Products/Services.aspx>