

Pachyderm Beta Concept Document

September 2, 2004

Overview of the Beta Arc

In the fall of 2004, the Pachyderm development team and partners will begin testing Pachyderm internally. Early on, we will conduct heuristic evaluations and user walkthroughs on paper mockups of the interface. Once the system is up and running, we will begin quality assurance (QA) testing using a professional testing service as well as carefully screened, experienced volunteers from the NMC community. During this period, we expect to be coding and testing in small cycles. QA testing should be concluded by the end of the year (2004). In the spring of 2005, we will begin an organized cycle of beta testing, using volunteers from among the NMC community.

Characteristics of Beta Tests

In general, beta tests share the following features:

- A bug tracking system, in which testers, QA personnel, and/or the development team may record and track the progress of reported bugs.
- A pool of beta testers. Generally, one out of every five testers will actually provide feedback.¹
- A "code freeze," which happens before the testing begins. From the point of the freeze forward, no new features are added to the system. The only coding that should take place is bug fixes. Any new features that are added will reset the beta timeline.
- A minimum of four test-fix-release cycles, in which testers have time to use the system and report any bugs they find, developers have time to fix the bugs, and then the system is released again.

Schedule for the Beta

For complete details, please see the document "Goals and Milestones for the Usability Team." What follows is an overview of the schedule, with particular attention given to the "public" beta among NMC members.

Heuristic evaluations and user walkthroughs with paper prototypes will take place in September and October of 2004, while the development team continues coding. The bug database should be in place no later than Nov. 1, 2004. Quality assurance testing would take place in November and early December 2004.

We will invite NMC members to apply to be beta testers in early January 2005. We hope that completing an application process will encourage participants to submit detailed feedback. We will split our applicants into four groups, adding one group to each of four successive beta releases throughout the spring. This should help to ensure that we get fresh feedback with each release.

Code freeze, the point where the system must be stable and no new features can be added, is currently scheduled for February 1, 2005. At this time, the testers would begin to use Pachyderm (only authoring with it; downloading and installing it will be tested in summer 2005). The version that is being tested must remain unchanged during the two-week period of beta testing. We will request that all feedback be submitted by Feb. 15, 2005, at which point the first round of beta testing will close for four weeks to give the development team time to fix the bugs that were discovered.

After the four-week bug-fixing period, we will release the second beta version, including the first group of testers as well as the second group of new testers. They will have two weeks to test Pachyderm, at which point the second phase will close and the developers will have three

weeks to fix bugs. This cycle repeats twice more, with a three-week and then a two-week bug fixing period.

While the beta testing of the authoring system is occurring, the development team will be working on the installation package (during the periods of code freeze in between fixing bugs). The installation package will then go through three beta cycles in the summer.

At the end of June, if the system is stable and bug-free, we will be ready to release the software. If not, we will add beta cycles as needed. If we are able to keep to the schedule outlined in the usability plan, release could occur as early as July 1, 2005.

¹ Spolsky, Joel. "Top Twelve Tips for Running a Beta Test." In *Joel on Software*, March 2, 2004. Retrieved from <http://www.joelonsoftware.com/articles/BetaTest.html>, July 16, 2004.