Rational® Policy Tester

IBM®

Version 5.5

Quick Start Guide

Policy Tester audits Web sites for issues impacting quality, privacy, and accessibility compliance issues across corporate web properties. Features of Policy Tester include a patented scan engine for enterprise wide assessment and analysis, issue management to help prioritize issues for immediate resolution, and web-based executive dashboards and actionable reports to quickly drill down into issues and share results across business units.

Product Overview

The Policy Tester product family offers three different editions:
- **Accessibility Edition** helps ensure Web site user accessibility by monitoring for over 170 accessibility checks.
- **Privacy Edition** uncovers and reports on online privacy oversights that may expose the organization to undue risk.
- **Quality Edition** automates Web site reviews for page defects such as spelling errors, broken links, slow loading pages, poor search and navigation to help improve usability.

1 Step 1: Installation and configuration

Installing and configuring Policy Tester requires careful planning and time, taking into account your environment and business requirements. Administrators should refer to the *Planning & Installation Guide* for full information or talk with your IBM® Software Services consultant.

2 Step 2: Typical workflow

1. Create a content scan.
2. Run the scan.
3. Create a report pack (a collection of reports).
4. Run the report pack.
5. Review results in the reports and (as required):
   - Perform additional manual explore for links that were not discovered
   - Print reports
   - Review and assign remediation tasks

3 Step 3: Reports

Metrics are generated from the data stored in the database gathered from the content scans and are delivered through:
- **Dashboards** — track and summarize the issues and trends of your Web properties. At a glance, a dashboard answers the following questions: How is my organization doing overall? Are there specific Web sites I should be concerned about? Are there specific types of issues I should be concerned about? Are my Web sites getting better or worse?
- **Summary reports** — outline detailed site issues for managers who require slightly more detailed information to better manage the Web business.
- **Detailed reports** — provide developers and QA personnel with high-level information, as well as drill-through access to more detailed information to use in the remediation process.

4 Step 4: Manual site navigation

You can manually explore your Web site to add content that otherwise might not be discovered by the automatic scan that runs from the Starting URL:
- You don't know the exact URL to add pages to the list of Starting URLs.
- You want to add pages not discovered automatically by a scan because the scan misses them (i.e., nonstandard js post-backs as links, embedded js or flash links).
- You want to add pages that are not discovered automatically for other reasons (i.e., orphan pages).
- You want to focus the testing to small subset of pages within a Web site or application.

5   Step 5: Managing users and access permissions

Policy Tester supports various users -- one user can set up and run jobs that scan and analyze a Web site. Another user will only browse through reports that detail the problems that were found with a Web site. Yet another user can set up and administer users. Another user (Report Consumer) will only browse through reports that detail the problems that were found with a Web site. Yet another user (QuickScan user) will scan a limited set of Web pages with a scan template created for them, allowing them to use product functionality without having an in-depth knowledge of it. Access permission control begins at a high level and progresses down to a more granular level on folders and folder items (jobs, report packs and dashboards). If a folder item contains sensitive information about your Web site, you can restrict access to the item so that those who should not see the sensitive information will not have access to it. Refer to the online help for more information.

6   Step 6: Create QuickScans

A QuickScan is a quick and easy for developers and QA personnel , or occasional users to test the applications they are working on or have a vested interest in. An Administrator creates scan templates comprises either a content scan job or an import job plus a report pack. The scan template will contain test policies, server groups and other options the Administrator considers important. QuickScan users select the template they want to use, enter the URL of the application they want to test, and create the scan.

7   Step 7: Chapter 7. Manage issues

Issue Management functionality helps you manage issues that are important to your organization and do so in a way that is supported both by the application's workflow and the workflows of other processes within your organization. You can define what issues are actually false positives and classify them so they do not appear again in subsequent reports. Issues that are false positives or that have been resolved can be excluded from future views of a particular report. Issue Management lets you mark Open issues as Fixed, In Progress, Passed or as Noise to reduce confusion and track progress better.

More information

For more information, see the following resources:
- Web Support at http://www.ibm.com/software/awdtools/tester/policy/family/support/index.html