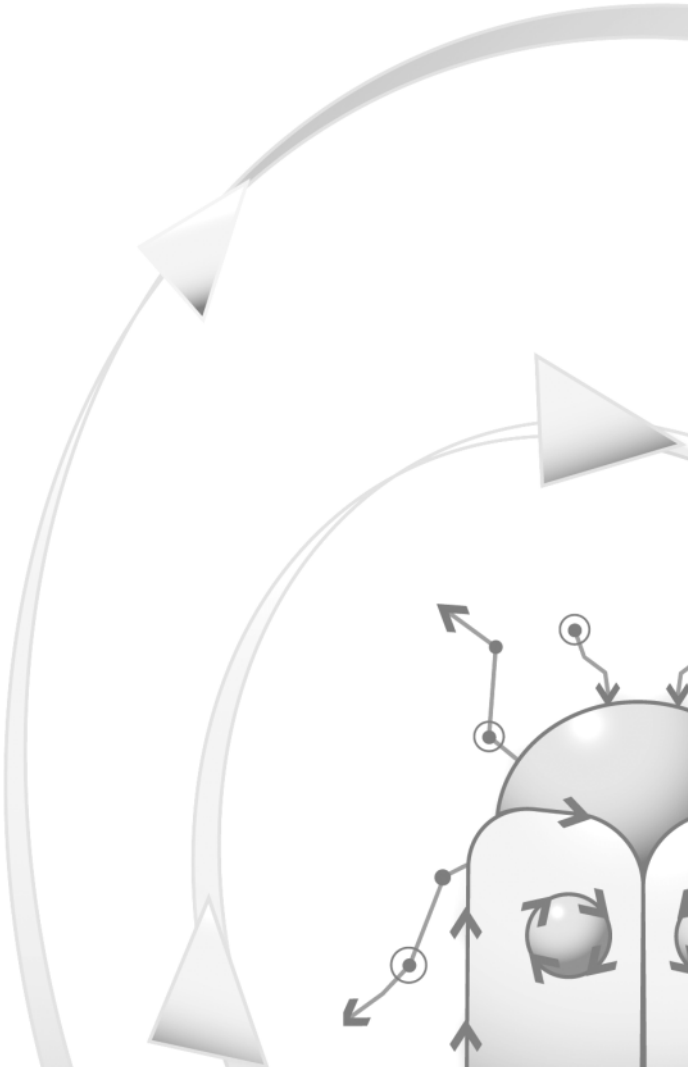
TestTrack Pro Web Client

User Guide
Admin Guide



Seapine Software™
changing the world of software development

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Contents

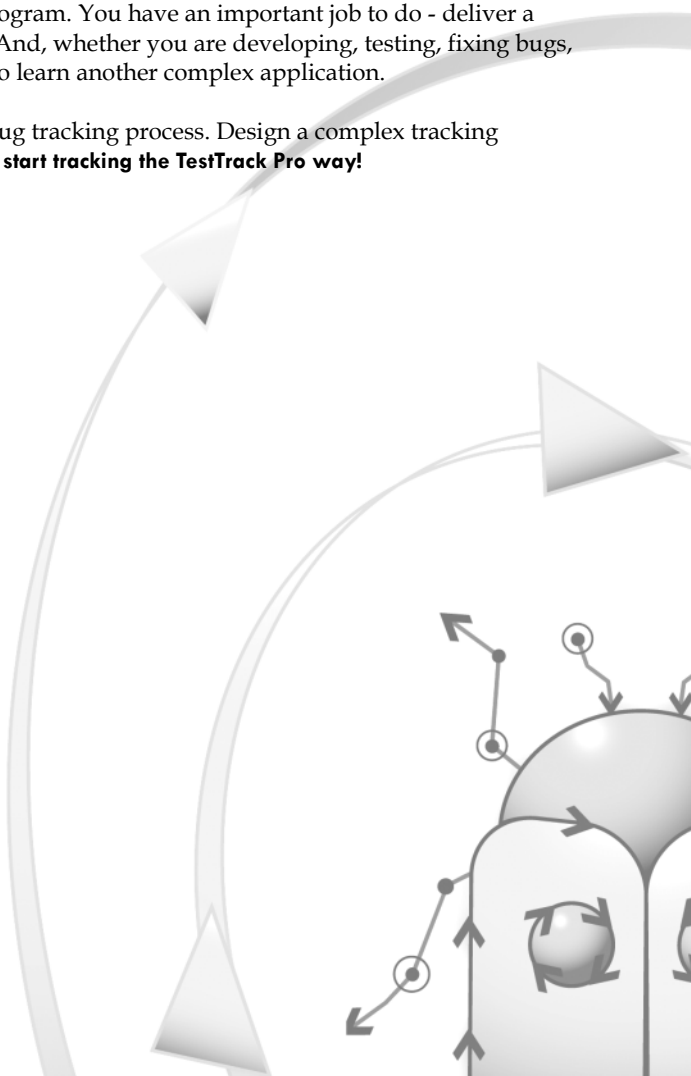
Introduction
About TestTrack Pro

Welcome to TestTrack Pro!

TestTrack Pro is the premier bug tracking program. You have an important job to do - deliver a quality product on time and within budget. And, whether you are developing, testing, fixing bugs, or managing the team, you don't have time to learn another complex application.

TestTrack Pro lets you take control of your bug tracking process. Design a complex tracking structure, or simply install the software, and **start tracking the TestTrack Pro way!**

This section includes:



About the guide

Using TestTrack Pro provides step-by-step instructions for all the tasks you perform when working with TestTrack Pro. The guide includes user-related tasks and admin-related tasks. Information included in some chapters can be for both a user and an administrator. Admin-related tasks are clearly marked in.

This guide is not necessarily meant to be read from start to finish. It includes information for users at a variety of levels. To get the most out of the documentation, start by reading the chapters that are most relevant to your use of TestTrack Pro.

- **Chapter 1 "Getting Started,"** page 5, explains how to start TestTrack Pro and set your user options.

User-related tasks

- **Chapter 2 "Learning the Basics,"** page 11, takes you on a tour of TestTrack Pro and explains the parts of the TestTrack Pro interface.
- **Chapter 3 "Working with Defects,"** page 19, explains how to work with defects, including adding, editing, deleting, and numbering defects.
- **Chapter 4 "Managing the Workflow,"** page 39, explains how to assign defects and move a defect through the lifecycle.
- **Chapter 5 "Using Filters,"** page 57, explains how to use filters, including adding, editing, and deleting filters.
- **Chapter 6 "Managing Test Configs,"** page 65, explains how to set up test configurations, including adding, editing, and deleting test configs.
- **Chapter 7 "Generating Reports,"** page 69, explains how to create and print reports.
- **Chapter 8 "Using the Workbook,"** page 85, explains how to add, change, view, and delete To Do tasks in the Workbook.

Admin-related tasks

- **Chapter 9 "Configuring Databases,"** page 89, explains how to create and customize a database and set up database options.
- **Chapter 10 "Customizing Fields,"** page 107, explains how to add custom fields, customize field values, rename filed labels, define required and default values, and set up field relationships.
- **Chapter 11 "Managing User Groups,"** page 123, explains how to add, edit, and delete user groups. It also explains how user groups provide security.
- **Chapter 12 "Managing Users,"** page 131, explains how to manage your TestTrack Pro users, including adding and deleting users and editing user information.

- **Chapter 13 "Managing Customers,"** page 139, explains how to manage customers, including adding and deleting customers and editing customer information.
- **Chapter 14 "Importing and Exporting Files,"** page 149, explains how to import and export record information and SoloBug files.
- **Chapter 15 "Customizing Email Templates,"** page 159, explains how to customize templates to provide users and customers with the information they need.

Conventions used in the guide

There are a few conventions used throughout the guide that are designed to be completely predictable – making it is easy to understand what you are reading and what you're supposed to do.

When you are instructed to select a menu command, you will find the menu name, followed by an arrow. For example, to get a file, choose **Activities > Get**. Indented text, set off with icons and rules, is also used to draw attention to notes, tips, examples, etc.

Icon	Indicates	Description
	Note	Indicates additional information about a feature or just may be something to keep in mind.
	Tip	Denotes ideas and procedures you may not discover on your own.
	If you want to know more...	Provides more detailed information and examples.
	Administrator command	Alerts you to an administrator-level command that you may not be able to access.

Before you start

This guide assumes your PC, printer, and network (if applicable) are set up and ready to use. It also assumes you know how to perform the basic skills needed to use them. If you need more information on basic features, refer to the user guide that came with your computer.

Contacting Seapine support

Telephone: 513-754-1655

Email: support@seapine.com

Web site: http://www.seapine.com

Check our **web site** for the latest news and updates. You can also find help in our **Knowledgebase**!

Documentation feedback

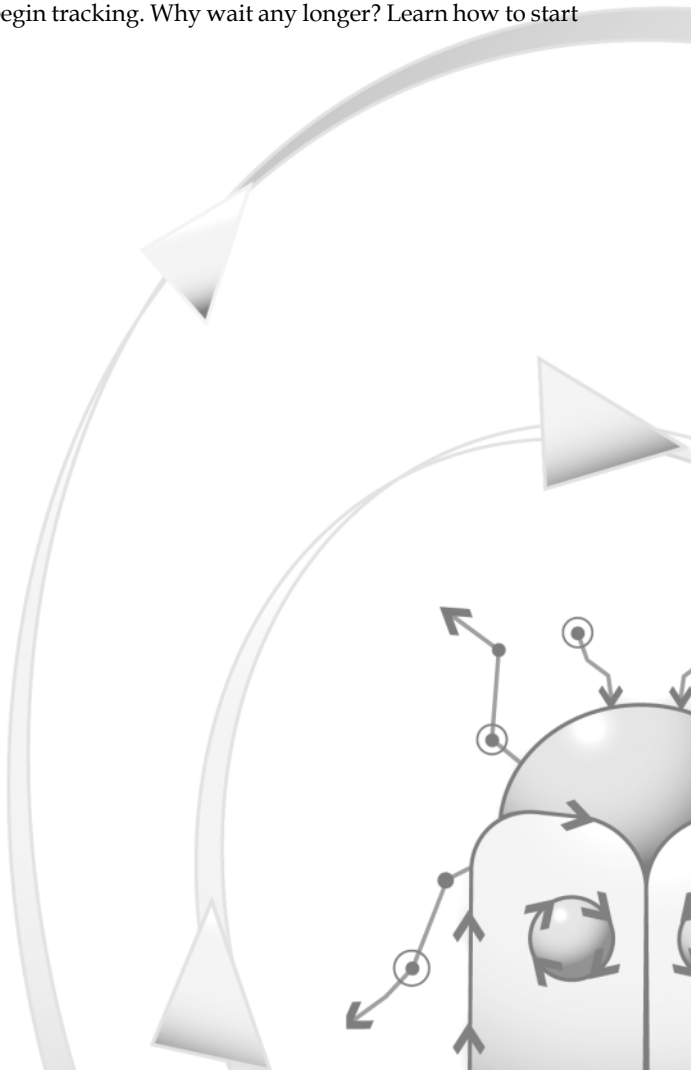
Seapine Software welcomes your feedback on the documentation included with this product. If you have comments or suggestions about the documentation, please email: **documentation @seapine.com**. This email address is provided for documentation only. You may not receive a reply to your email. For technical questions or support, contact **support@seapine.com**.

Chapter 1
Getting Started

1-2-3 Start Tracking!

In minutes, you can start TestTrack Pro and begin tracking. Why wait any longer? Learn how to start TestTrack Pro and set your user options!

This section includes:



Starting TestTrack Pro server

The TestTrack Pro administrator is generally responsible for starting and maintaining the TestTrack Pro server application.

The server must be running before users can access TestTrack Pro database. The server can be run as an application, as an NT/2000 service, or as a Windows pseudo service. Refer to the **TestTrack Pro Installation Guide** for more information.

If you are running the TestTrack Pro server as an NT/2000 or Windows service, the server starts automatically. If you are running the TestTrack Pro server as an application, you have to manually start the server each time the computer is restarted.

Manually starting TestTrack Pro server

1 On the Start menu, choose **Programs > TestTrack Pro > TestTrack Pro Server**.

When the TestTrack Pro server is started, it front loads any active databases.

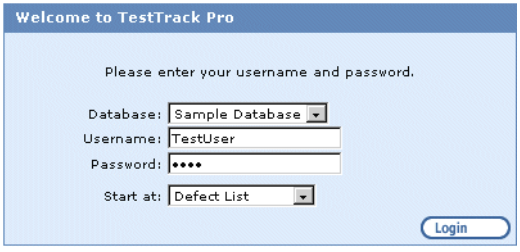
When the TestTrack Pro server is running, it places an icon in the status area on the taskbar of the server PC. If the bug remains yellow or red, TestTrack Pro server is not running properly. When the TestTrack Pro server compacts a database, it can take several minutes for the TestTrack Pro server icon to turn green.

Starting TestTrack Pro

1 Start your Web browser and enter the TestTrack Pro URL provided by your system administrator.

For example: <*http://127.0.0.1/ttweb/login.htm*> or <*http://www.yourserver.com/ttweb/login.htm*>

2 The Login to TestTrack Pro dialog opens.



3 Select the database you want to open from the **Database** menu.

4 Enter your **Username** and **Password**.

5 Select the page you want to start at from the **Start at** menu.

6 Click **Login**.

You are now logged in and ready to start using TestTrack Pro. TestTrack Pro opens on the page you selected from the **Start at** menu.

7 If there is a problem connecting to the server, check the following and try reconnecting:

- Double-check the IP address and/or port number.
- Make sure you are connected to the network, intranet, or Internet.
- Contact your TestTrack Pro administrator for help.

If you are the **TestTrack Pro administrator**, check the following:

- Make sure the server computer is on.
- Make sure the TestTrack Pro server application is running on your server computer.

Where do I start?

If you are the **Project Manager,** start with the Defects list and create filters to view specific defect information. For example, create a filter to display all defects in an Open state. You may also want to print a report that lists all defects opened in the past week.

If you are the **Lead Engineer,** start with the Defects list. Create a filter that displays all defects created, fixed, or verified in the last week **and** that are not currently assigned and not in the closed state. Then, assign the defects to the appropriate person.

If you are an **Engineer/Developer,** start with the Workbook. The Workbook displays all the defects assigned to you and any to do tasks you added. You can also start with the Defects list and create a filter to displays only the defects assigned to you.

If you are the **Lead QA** person, start with the Defects list and create a filter that displays all defects that are currently released to testing. Then, assign these defects to a QA team member for verification. You can also create a filter that displays defects that failed verification.

If you are a member of the **QA team,** start with the Workbook. The Workbook displays all the defects assigned to you and any to do tasks you added. If you need to add new defects, start with the Defects list.

Setting user options

1 Click **User Options**.

The User Options dialog opens. The options you select are user-specific.

2 Enter a **Password**.

To prevent other users from accessing your account, you should set a password. If security is not a concern, you do not need to set a password.

3 Enter the number of records you want displayed per page.

Remember, the larger the number, the longer the refresh time! It can also be difficult to navigate through a large number of records.

4 Select **Grey out closed defects** if you want closed defects to appear greyed-out and italicized.

This option can help you quickly view closed defect.

5 Select mail notification options.

Email notifications provide a way to stay up to date with changes to defects. You can choose as many email notification options as you want. Choose options carefully so you do not receive an email every time a defect moves to another state in the workflow.

If you are a team lead, you might want to receive an email notification when a defect is added to the database. Select **Send me mail when new defects are added.** If you are a developer, you are probably only interested in defects that are assigned to you. Select **Send me mail when new defects are added** then select **Only tell me about new defects that are assigned to me.** You will only receive an email if the new defect is assigned to you.

To control the number of emails you receive, select a filter from the corresponding filter menu. You will only receive an email if the defect passes the filter criteria.

6 Select a **Display names as** option.

TestTrack Pro defaults to Last, First (e.g., Smith, John).

7 Select a **Display assignment information in the status field** option.

You can display the status or the status and assignment information.

8 Select an **Adding multiple defects** option.

9 Select a **Time zone** option.

10 Click **Save**.

Logging out

Make sure you logout of TestTrack Pro. If you close the browser without logging out, the TestTrack Pro connection remains open and you stay logged in. If this happens, login again on the same computer and then logout.

1 Click **Logout**.

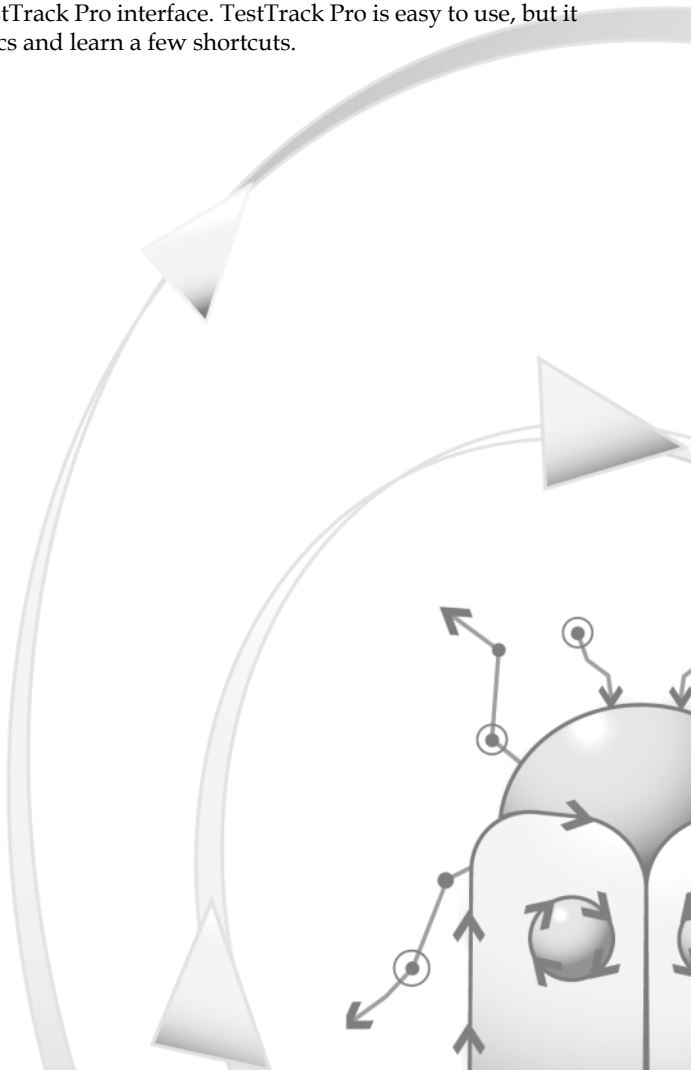
2 You can now close your browser.

Chapter 2
Learning the Basics

Take a tour!

This chapter provides an overview of the TestTrack Pro interface. TestTrack Pro is easy to use, but it is even easier when you understand the basics and learn a few shortcuts.

This section includes:



About the TestTrack Pro interface

Depending on your security level, you may not have access to all of TestTrack Pro's commands. If a tab, button, or link is always greyed-out and unavailable, you do not have access to that command.

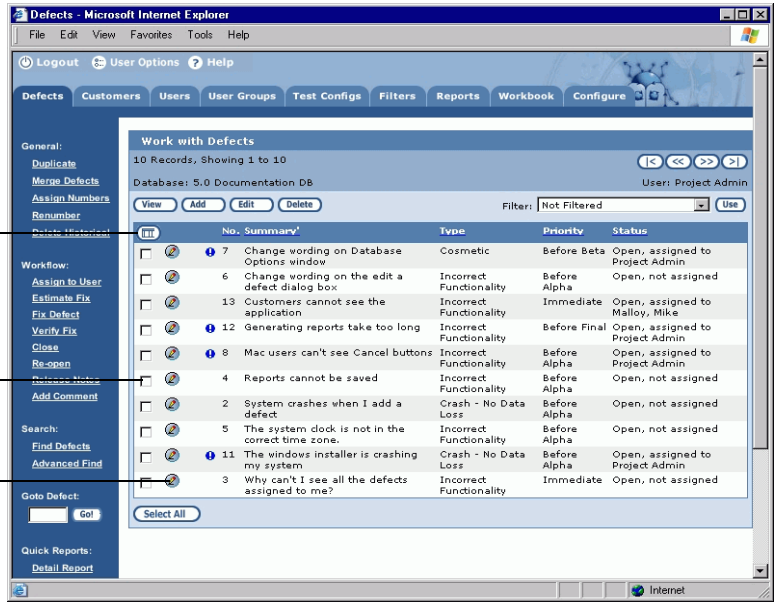
The TestTrack Pro interface is intuitive and easy to use. The interface includes eight list windows: **Defects**, **Customers**, **Users**, **User Groups**, **Test Configs**, **Filters**, **Reports**, and **Workbook**. The tabs across the top of the page correspond to the different types of records you can work with. For example, click **Reports** to set up, view, and run reports. After clicking **Reports**, the **Reports** list window opens. Information is displayed on each page in a column format.

Commands you have access to are active and underlined.

Click to configure list window columns.

Click the check box to select the record.

Click the quick link button to edit the defect.



When adding or editing information, the tabs across the top of the page are disabled. TestTrack Pro cannot automatically save your work or notify you to save your work. Before you navigate away from the add or edit dialog, make sure you click **Save**.

Command buttons

Command buttons are located at the top of every list window. These buttons provide a way to access the View, Add, Edit, and Delete commands.

Button	Description
	Opens the corresponding View dialog
	Opens the corresponding Add dialog
	Opens the corresponding Edit dialog
	Deletes the selected item

Commands list

To perform commands, such as duplicating a defect, select the command from the left-side menu bar. The commands change based on the records you are working with and your security level. You can also add quick link buttons that provide access to commonly used defect action commands. For example, if you are responsible for fixing defects, add the **Fix Defect** quick link button to the Defects list window. For more information, see **Adding quick link buttons,** page 16.

List windows

List windows are used to display basic record information. TestTrack Pro includes the following list windows: **Defects**, **Customers**, **Users**, **User Groups**, **Test Configs**, **Filters**, **Reports**, and **Workbook**.

Opening list windows

Click the corresponding tab across the top of the page. For example, click **Customers** to open the Customers list window.

Selecting records

- To open records, select the corresponding check box and click the corresponding command or command button. You can select multiple records at one time. For example, if there are 5 users you want to view, select each user's corresponding check box then click **View**. The View User dialog opens.

- You can also add quick link buttons to the list windows. Instead of selecting a check box, you can click the quick link button to edit the defect (or view it or display a detail report). For example, instead of scrolling through a list of users, selecting the user by clicking the check box, then scrolling back up the page to click **View**, you can add a **View User** quick link button to the Users list window. For more information, see **Adding quick link buttons,** page 16.

Defects list window

The Defects list window provides access to defects and defect actions. For more information, see **Chapter 3, "Working with Defects,"** page 19.

This list window also includes defect indicators that point out new, changed, and closed defects and the defects assigned to you. You can filter the records that are displayed in the list window.

Defect indicators

Defect indicators, are icons on the Work with Defects page that indicate new defects, changed defects, closed defects, and the defects that are assigned to you.

Icon	Name	Indicates
	New Defect	Defects added since you last logged in
	Changed Defect	Defects that changed since you last logged in
	Closed Defect	Closed defects
	Assigned Defect	Defects assigned to you

Customers list window

The Customers list window provides access to customers and customer commands. For more information, see **Chapter 13, "Managing Customers,"** page 139.

Users list window

The Users list window provides access to users and user commands. For more information, see **Chapter 12, "Managing Users,"** page 131.

User groups list window

The User Groups list window provides access to user groups and user group commands. For more information, see **Chapter 11, "Managing User Groups,"** page 123.

Test configs list window

The Test Configs list window provides access to test configs and test config commands. For more information, see **Chapter 6, "Managing Test Configs,"** page 65.

Filters list window

The Filters list window provides access to filters and filter commands. For more information, see **Chapter 5, "Using Filters,"** page 57.

Reports list window

The Reports list window provides access to reports and reports commands. For more information, see **Chapter 7, "Generating Reports,"** page 69.

Workbook list window

The Workbook list window provides access to your personal workbook, your assigned defects, and tasks you add to the Workbook. For more information, see **Chapter 8, "Using the Workbook,"** page 85.

Configuring columns

Take the time to configure columns for each of the list windows you have access to. You can add quick link buttons, add and remove columns, and select column sort orders. Customize the list windows to provide the information you need.

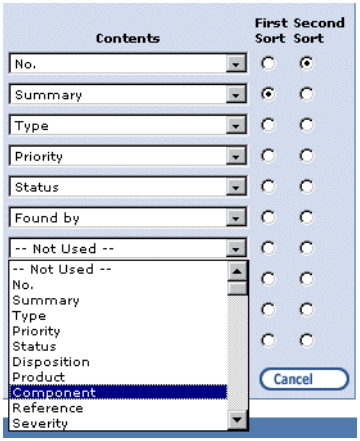
Adding columns

1 Click the **Setup Columns** button.

The Configure Columns dialog opens.

2 Click a **-Not Used-** column field in the **Contents** area.

A list of all available column fields opens.



3 Select the column field you want to add.

4 Click **Save**.

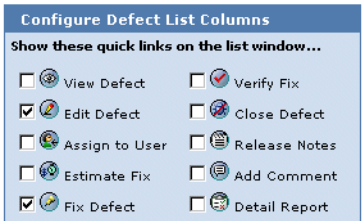
A new column, with the column heading and corresponding contents, is added to the page.

Adding quick link buttons

Quick link buttons provide a shortcut to the most popular list window commands. You can configure quick link buttons for each list window. The buttons you can set vary based on the list window. If a command is not available, the quick link button is disabled. For example, if you do not have security access to edit closed defects, the **Edit Defect** quick link is disabled if a record contains a closed defect.

1 Click the **Setup Columns** button.

The Configure Columns dialog opens.



2 Select the corresponding check box of the quick links buttons you want to display.

3 Click **Save**.

The quick link buttons are added to the list window.

Sorting columns

To select a new primary sort column quickly, **click** the column heading on the page. A single tick mark appears to the right of the column heading.

1 Click **Setup Columns**.

The Configure Columns dialog opens.

2 Select **First Sort** for the primary sort column.

3 Select **Second Sort** for the secondary sort column.

4 Click **Save**.

The sorted list opens. A single tick mark appears to the right of the primary sort column heading. Two tick marks appear to the right of the secondary sort column heading. You can change the sort order from ascending to descending or vice versa by clicking the column heading on the page.

Changing column contents

You can change the column contents by selecting a new column field. You can also reorder columns by changing column contents.

1 Click **Setup Columns**.

The Configure Columns dialog opens.

2 Click the corresponding column field you want to change.

3 Select the new column field and click **Save**.

The column heading and contents change to match the selected column field.

Removing columns

1 Click **Setup Columns**.

The Configure Columns dialog opens.

2 Click the corresponding column menu you want to remove.

3 Select the **-Not Used-** column field from the menu and click **Save**.

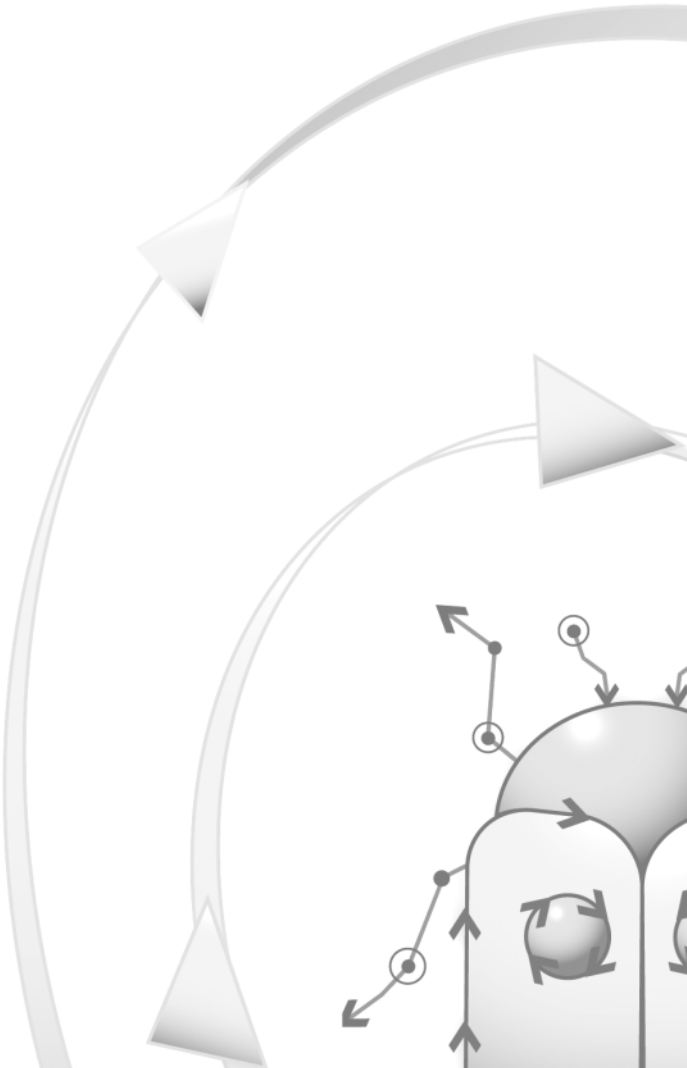
The column is removed.

Chapter 3
Working with Defects

Squash the bugs...

...and **move on to the next challenge**! TestTrack Pro lets you track all aspects of defect management, which means long-forgotten bugs don't surface just before a release and great ideas don't end up on scraps of paper in the trash.

This section includes:



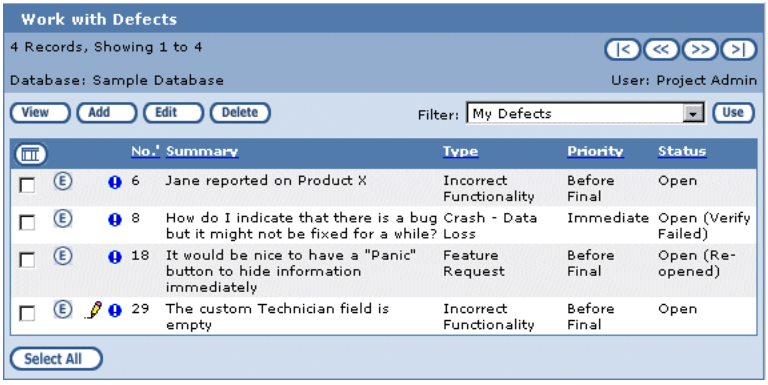
About defects

A defect is a bug, enhancement, change request or any other product-related issue you want to track and resolve. You can track "traditional bugs" such as issues that directly affect software performance. You can also track other types of issues such as documentation errors, typos, customer suggestions, comments about the interface, etc. Depending on your needs, you can configure complex tracking methods or simply use TestTrack Pro as a bug "to do" list.

Adding defects

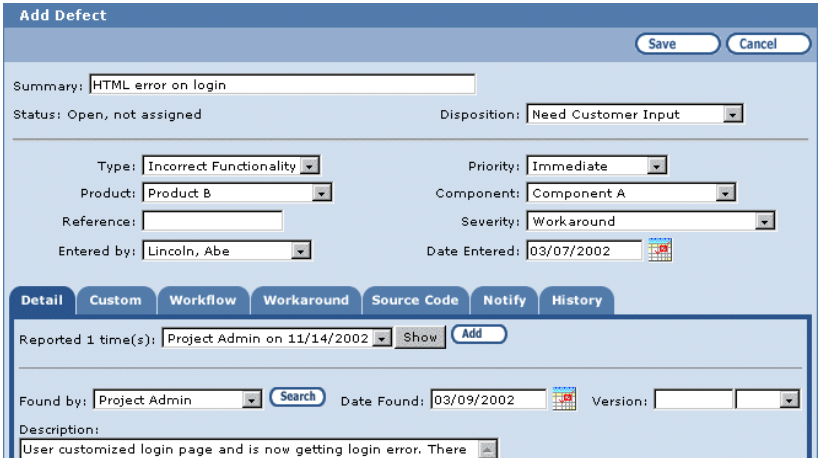
1 Click the **Defects** tab.

The Work with Defects page opens.



2 Click **Add**.

The Add Defect dialog opens. This dialog includes the following tabs: Detail, Custom, Workflow, Workaround, Source Code, Notify, and History. Depending on your database configuration, you may not access have to all tabs.

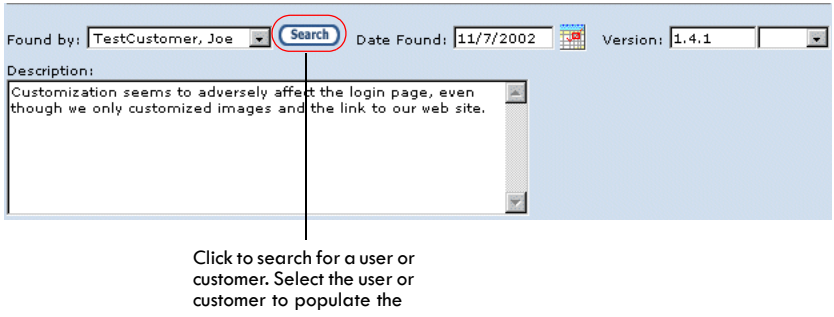


3 Enter the information in the top portion of the Add Defect dialog box.

- Enter a defect **Summary**.
- Select the defect **Type** from the menu.
- Select the **Product** from the menu.
- Enter a **Reference** number pertinent to the defect.
- **Entered by** defaults to the current user or you can select a user from the menu.
- Select the defect **Disposition** from the menu.
- Select the defect **Priority** from the menu.
- Select the **Component** from the menu.
- Select the defect **Severity** from the menu.
- **Date Entered** defaults to the current date. You can enter another date or click the calendar to select a date.

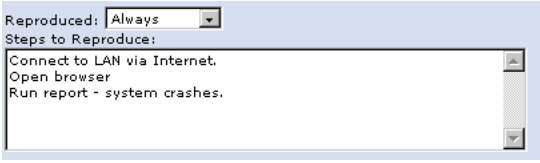
4 Enter the **Found By** information on the **Detail** tab.

- Select a **Found by** user. Click **Search** to search for a user or customer. Enter the search criteria. If matching users or customers are found, select one to populate the **Found by** field.
- **Date found** defaults to the current date. You can enter another date or click the calendar to select a date.
- Select a **Version** number from the menu. Depending on your database configuration, you may be able to enter a version number in this field.
- Enter a detailed **Description** of the defect.



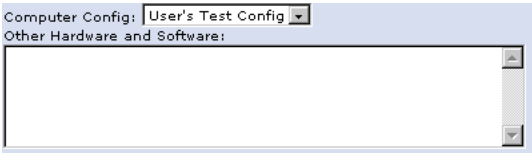
5 Enter the **Reproducible** information on the **Detail** tab.

- Select a **Reproduced** level from the menu.
- Enter the detailed **Steps to Reproduce** the problem. Be as specific as possible.



6 Enter the **Computer Config** information on the **Detail** tab.

- Select a **Computer Config** from the menu. This field defaults to the current user's computer config.
- Enter information about other **Hardware and Software** that could be affecting the problem.



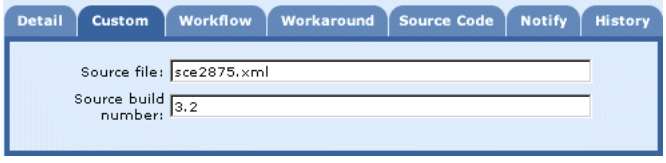
7 Optionally, attach a file to the defect.

See **Attaching files to a defect,** page 24 for more information.

8 Click the **Custom** tab.

This tab is not active for all databases.

If your database uses custom fields, enter the values. If a database uses custom fields, up to two custom fields may be displayed in the main area of the Add Defect, Edit Defect, and View Defect dialogs. The custom fields can also all be displayed on the Custom Fields tab – make sure you click this tab to enter or check custom field information.

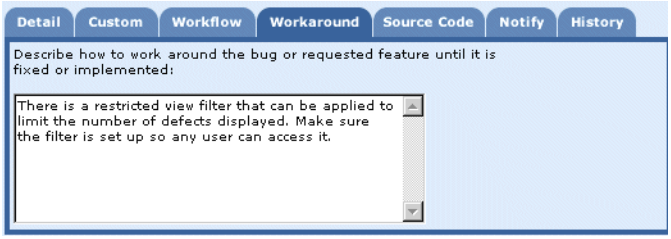


9 Skip the **Workflow** tab.

This tab is populated with defect action information and is useful when editing or viewing defects.

10 Click the **Workaround** tab.

Enter a workaround for the bug that can be used until it is fixed or a solution is implemented.

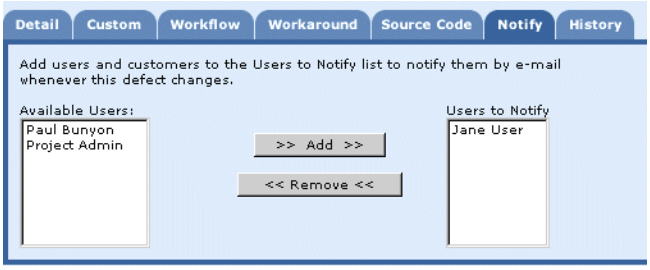


11 Skip the **Source Code** tab.

This tab is used for SCC application functions.

12 Click the **Notify** tab.

Select the users or customers you want to notify when the defect changes.



13 Skip the **History** tab.

This tab is populated with defect historical information and is useful when editing or viewing defects.

14 Click **Save** when you finish entering the defect information.

The defect is added to the database and you are ready to add another defect.

Adding additional reports to a defect

Users, customers, or beta sites often report the same defect. To help eliminate duplicates in your database, you can add the defect once and add all additional reports to the same defect.

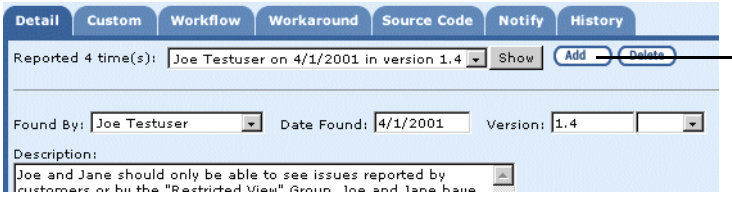
1 Click the **Defects** tab.

2 Select the defect you want to add an additional report to and click **Edit**.

The Edit Defect dialog opens.

3 On the Detail tab, click **Add** located next to the **Show** button.

The number in the **Reported (x) Times** field increases by one.



Click to add additional defect reports

If your browser does not support JavaScript, click **Show** to refresh the **Reported (x) Times** field.

4 Enter the defect information and click **Save**.

See **Adding defects,** page 20 for more detailed information.

Attaching files to a defect

The more information you supply with a defect report, the easier it is to fix. For example, if a defect is corrupting a file, you can attach the corrupt data file for reference. If you want to point out a cosmetic change to a screen, you can attach a screenshot with the changes you want.

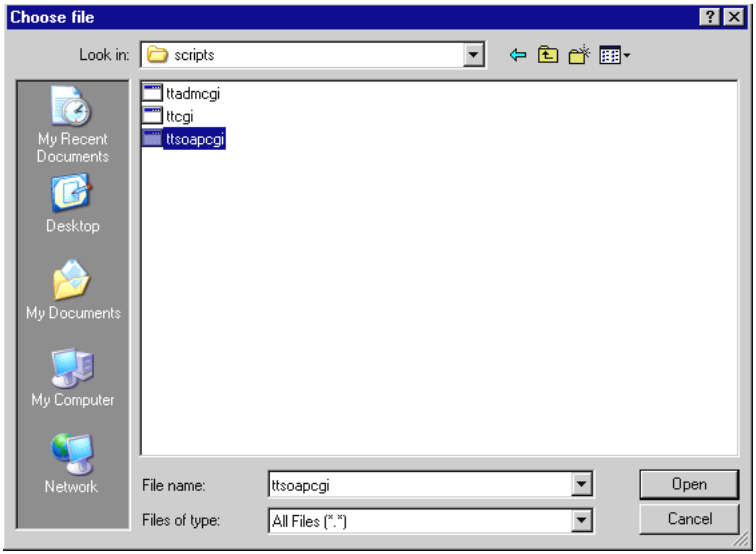
You can attach files to defects as they are added or you can edit a defect and attach a file to it.

1 On the Detail tab, click **Browse** in the Attachments area.

You can also enter the file information in the **Add Attachment** field.

Click to select the file you want to attach to the defect

2 The Choose file dialog opens.



3 Select the file you want to attach and click **Open**.

4 The file information is listed in the **Add Attachment** field.

5 Click **Upload**.

The file is added to the defect.

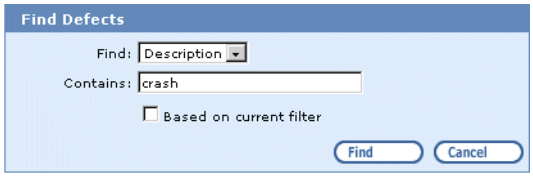
Finding defects

You can search against the summary, description, or notes fields.

If you do not have security access to these fields, the Find Defects command is disabled. If you do not have security access to *one* of the fields, it is not included in the Find menu.

1 Click the **Defects** tab then click **Find Defects**.

The Find Defects dialog opens.



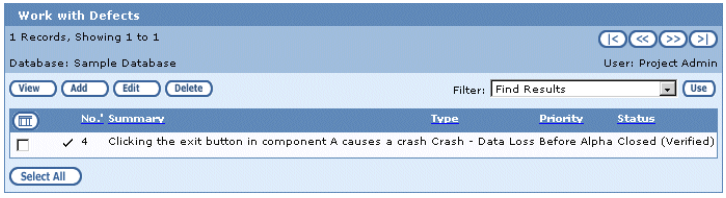
2 Select a search field from the **Find** menu.

3 Enter the text you want to search for in the **Contains** field.

Select **Based on Current Filter** if you only want to search the filtered defects.

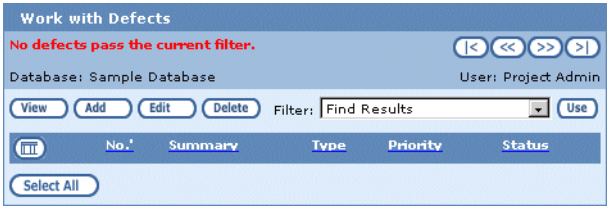
4 Click **Find**.

5 If matching defects are found, the search results are displayed on the Work with Defects page. Notice the **Find Results** filter is applied.



If your browser does not support JavaScript, click **Use** to refresh the screen.

6 If matching defects are not found you return to the Work with Defects page, which is empty. Notice the **Find Results** filter is applied.



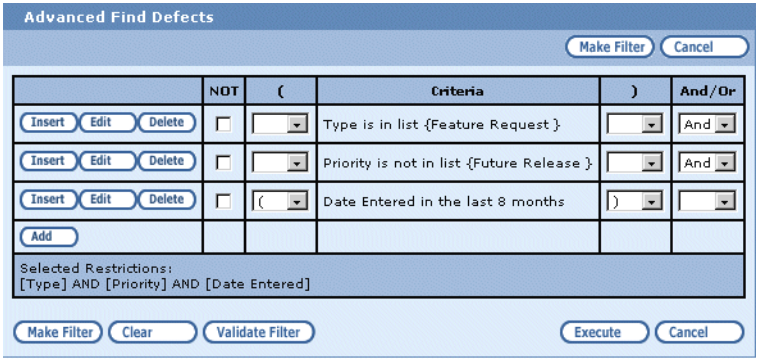
If your browser does not support JavaScript, click **Use** to refresh the screen.

Using advanced find

Advanced find lets you perform a more powerful search using filters and Boolean logic. You can also search on multiple restrictions. For more information about filters and Boolean logic, see **Chapter 5, "Using Filters,"** page 57.

1 Click the **Defects** tab then click **Advanced Find**.

The Advanced Find Defects dialog opens.



If you are using a filter and click **Advanced Find**, the Advanced Find Defects dialog is populated with defects that meet the filter criteria. If you do not want to use these restrictions, click **Clear** to clear the restrictions and start over.

2 Click **Add** to add a search restriction.

See **Adding restrictions,** page 60 for more information.

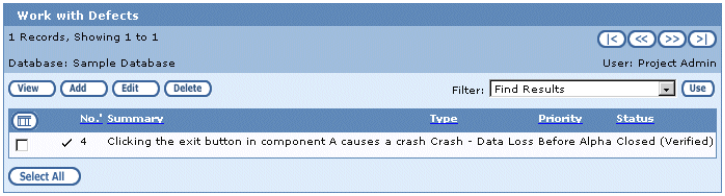
3 Select NOT/AND/OR operators and parentheses to build the Boolean logic for the filter (optional step).

4 Click **Validate Filter** to validate the search criteria.

If the criteria is not valid, an error is displayed on the Advanced Find Defects dialog. Correct the error and click **Validate Filter** again.

5 Click **Execute** to begin the search.

6 If matching defects are found, the search results are displayed on the Work with Defects page. Notice the **Find Results** filter is applied.



If your browser does not support JavaScript, click **Use** to refresh the screen.

7 If matching defects are not found you return to the Work with Defects page, which is empty. Notice the **Find Results** filter is applied.

If your browser does not support JavaScript, click **Use** to refresh the screen.

Viewing defects

1 Click the **Defects** tab.

2 Select the defect and click **View.**

The View Defect dialog opens. All fields are read-only.

3 Click the **Workflow** tab.

This tab includes an overview of where the defect is in the workflow, what defect actions were assigned, who the actions were assigned to, and any comments or additional information a user entered.

4 Click the **History** tab.

Each time a defect action is assigned, TestTrack Pro adds this information to the defect's history. The History tab includes who created the defect, when the defect was created, the creation method, who last modified the defect, and the date of the last modification.

5 Click **Done** to close the View Defect dialog.

Editing defects

1 Click the **Defects** tab.

2 Select the defect and click **Edit**.

The Edit Defect dialog opens.

If another user is editing the defect, the View Defect dialog opens. The message **"IN USE BY (Username)"** appears in the title bar.

3 Make any changes and click **Save**.

Opening attached files

You can open the attachment with the application used to create it. If a customer sends a Microsoft Word document, TestTrack Pro opens the file in Word.

1 Click the **Defects** tab.

The Work with Defects page opens.

2 Select the defect with the attachment you want to open and click **Edit**.

3 In the Attachments area, select the file from the **Attachments** menu and click **Open**.

The File Download dialog box opens. You are prompted to either open the file or save it to your computer.

4 Click **Open**.

The file is opened.

Downloading attached files

You can download and save the attached file. For example, if a a corrupted data file is attached to a defect, you can download the file to a specific folder.

1 Click the **Defects** tab.

2 Select the defect with the attached file you want to download and click **Edit**.

3 In the Attachments area, select the attached file from the **Attachments** menu.

4 Click **Download**.

The File Download dialog box opens. You are prompted to either open the file or save it to your computer.

5 Click **Save**.

The Save As dialog box opens.

6 Select a directory and enter a file name.

7 Click **Save**.

The file is downloaded to the folder you selected.

Duplicating defects

Depending on your security level, you may not have access to this command.

If you are adding defects with the same basic information, you can save time by duplicating and modifying a defect.

1 Click the **Defects** tab.

2 Select the defect and click **Duplicate**.

The defect is duplicated and assigned the next available defect number.

3 Edit the defect and save your changes.

Merging defects

Depending on your security level, you may not have access to this command.

Merging defects helps avoid confusion and keep your database organized. For example, two defects report the same issue. JoeDeveloper is assigned one defect and JaneDeveloper is assigned the other one. The developers are working on the same issue and do not realize it.

1 Click the **Defects** tab.

2 Select the defects and click **Merge Defects**.

A warning message opens, letting you know the defects will be merged and deleted from the database.

3 Click **Merge**.

The merged defect assumes the lowest defect number and the type, priority, and severity of that defect. All defect information is retained as **multiple defect records**. If you merge three defects, the Detail tab shows three defect records. Each defect record includes the original defect information.

Editing additional defect reports

1 Click the **Defects** tab.

2 Select the defect and click **Edit**.

The Edit Defect dialog opens.

3 On the Detail tab, select the report you want to edit from the **Reported (x) time(s)** menu.

4 Make any changes and click **Save**.

Using deferred defect numbering

This is an administrator function. Depending on your security level, you may not have access to this command.

During product testing, bug reports are rapidly submitted from a variety of sources. Many are new bugs or feature requests that you need to track; some are not unique or do not need to be tracked. You can store new defects in the database and number them after confirming they are unique defects. This feature is **deferred defect numbering**. You can perform the same action on an unnumbered defect that you perform on a numbered defect.

When deferred defect numbering is active, new defects appear in the defect list with a dash in the column instead of a defect number. These are **unnumbered defects**. The TestTrack Pro administrator, or another user with a high level of security access, should periodically review unnumbered defects and assign defect numbers, merge them with existing defects, or delete them.

1 Click the **Configure** tab.

2 Click **Database Options**.

The Edit Database Options dialog opens.

3 Click the **Defects** tab and select the deferred numbering options.

4 Click **Save** to save the options.

Assigning defect numbers

Depending on your security level, you may not have access to this command.

1 Click the **Defects** tab.

2 Select the unnumbered defects and click **Assign Numbers**.

The next available number is assigned.

Renumbering defects

Depending on your security level, you may not have access to this command.

Over the duration of your project, you may delete or merge defects that leave gaps in the defect numbers sequence. Or, at the start of a new development cycle, you may want to purge all closed defects from the project and use it as a fresh starting point for testing. In both cases, you will want to renumber defects.

1 Click the **Defects** tab.

2 Select the defects and click **Renumber**.

The Renumber Defects dialog opens with the starting number set to the next available defect number.

3 Enter an unused defect number and click **Renumber**.

The Renumber Defects dialog closes and the defect is renumbered.

- If the renumbered defect uses a number that is higher than the next available defect number, the next available defect number is set to one higher than the renumbered defect. For example, if the next defect added to the database would be numbered 1011 and you renumber a defect to 1200, the next defect added will be 1201.
- If you renumber the entire defect list, you still need to set the next available defect number to one greater than the highest defect number.

Changing bulk fields

The following security options must be enabled to access this command: Edit Defect, Edit Database Options, and Import from XML.

You can quickly, and easily, update multiple records in the TestTrack Pro database. Use this command to replace values for specific fields, search for and replace strings in text fields, or add text.

You can replace values for the following field types: General, Reported By, Steps to Reproduce, Computer Config, Defect Actions, and Custom Fields. For example, you can change the disposition for 100 records to *on hold*. Or you can change the *Found by User* for specific records.

Replacing general field values

1 Click the **Defects** tab.

2 Select the defects and click **Bulk Field Changes.**

The Bulk Field Changes dialog opens with the **General** tab selected.

3 Make any changes.

- To add text, enter the text in the **Summary** field and select **Prepend** or **Append**.
- To replace text, enter the string you want to search for in the **Replace** field and the string you want to replace it with in the **With** field.
- To change values, select the value from the corresponding menu.

4 Click **Save**.

You are prompted to confirm the changes.

5 Click **OK**.

The records are updated.

Replacing reported by field values

1 Click the **Defects** tab.

2 Select the defects and click **Bulk Field Changes.**

The Bulk Field Changes dialog opens.

3 Click the **Reported By** tab.

4 Make any changes.

- If defects are reported multiple times and you want to change all reported by records, select **Apply changes to all Reported by records**. If you only want to change the first reported by record, do not select this option. For example, you want to change the Found by user for 50 defects. Some of the defects were reported multiple times. Select this option to change the found by user for each reported by record. If you do not select this option, only the first reported by record is changed.
- To change values, select the value from the corresponding menu.
- To add text, enter the text in the **Description** field and select **Prepend** or **Append**.
- To replace **Description** text, enter the string you want to search for in the **Replace** field and the string you want to replace it with in the **With** field.

5 Click **Save**.

You are prompted to confirm the changes.

6 Click **OK**.

The records are updated.

Replacing steps to reproduce field values

1 Click the **Defects** tab.

2 Select the defects and click **Bulk Field Changes.**

The Bulk Field Changes dialog opens.

3 Click the **Steps to Reproduce** tab.

4 Make any changes.

- If defects are reported multiple times and you want to change all reported by records, select **Apply changes to all Reported by records**. If you only want to change the first reported by record, do not select this option.

- To change values, select the value from the corresponding menu.
- To add text, enter the text in the **Steps to Reproduce** field and select **Prepend** or **Append**.
- To replace **Steps to Reproduce** text, enter the string you want to search for in the **Replace** field and the string you want to replace it with in the **With** field.

5 Click **Save**.

You are prompted to confirm the changes.

6 Click **OK**.

The records are updated.

Replacing computer config field values

1 Click the **Defects** tab.

2 Select the defects and click **Bulk Field Changes.**

The Bulk Field Changes dialog opens.

3 Click the **Computer Config** tab.

4 Make any changes.

- If defects are reported multiple times and you want to change all reported by records, select **Apply changes to all Reported by records**. If you only want to change the first reported by record, do not select this option.
- To change values, select the value from the corresponding menu.
- To add text, enter the text in the **Other Hardware and Software** field and select **Prepend** or **Append**.
- To replace **Other Hardware and Software** text, enter the string you want to search for in the **Replace** field and the string you want to replace it with in the **With** field.

5 Click **Save**.

You are prompted to confirm the changes.

6 Click **OK**.

The records are updated.

Replacing defect actions field values

1 Click the **Defects** tab.

2 Select the defects and click **Bulk Field Changes.**

The Bulk Field Changes dialog opens.

3 Click the **Defect Actions** tab.

4 Select a **Defect Action**.

The fields on this tab change based on the defect action you select.

5 Make any changes.

- If you want to change all defect actions select **Apply to all actions**. If you only want to change the newest defect action, do not select this option. For example, you need to change by Assign By user for 100 defects. Most of these defects have been manually assigned multiple times. Select this option to change every assign by record for all defects. If you do not select this option, only the newest assign by record is changed.
- To change values, select the value from the corresponding menu.
- To add text, enter the text in the **Notes** field and select **Prepend** or **Append**.
- To replace **Notes** text, enter the string you want to search for in the **Replace** field and the string you want to replace it with in the **With** field.

6 Click **Save**.

You are prompted to confirm the changes.

7 Click **OK**.

The records are updated.

Replacing custom field values

1 Click the **Defects** tab.

2 Select the defects and click **Bulk Field Changes.**

The Bulk Field Changes dialog opens.

3 Click the **Custom Fields** tab.

4 Select a **Custom Field**.

The fields on this tab change based on the custom field you select.

5 Make any changes.

6 Click **Save**.

You are prompted to confirm the changes.

7 Click **OK**.

The records are updated.

Deleting additional defect reports

Make sure you want to delete the report. You are not prompted to confirm the deletion and this action cannot be undone!

1 Click the **Defects** tab.

2 Select the defect that contains the record you want to delete and click **Edit**.

3 On the Detail tab, select the report you want to delete from the **Reported (x) time(s)** menu.

4 Click **Delete** located next to the **Show** button.

The additional defect report is deleted.

Deleting attached files

Make sure you want to remove the file - this action cannot be undone!

1 Click the **Defects** tab.

2 Select the defect with the attached file you want to remove and click **Edit**.

In the Attachments area, select the attached file from the Attachments list and click **Remove**.

3 The attached file is deleted.

Deleting defects

1 Click the **Defects** tab.

2 Select the defect you want to delete and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

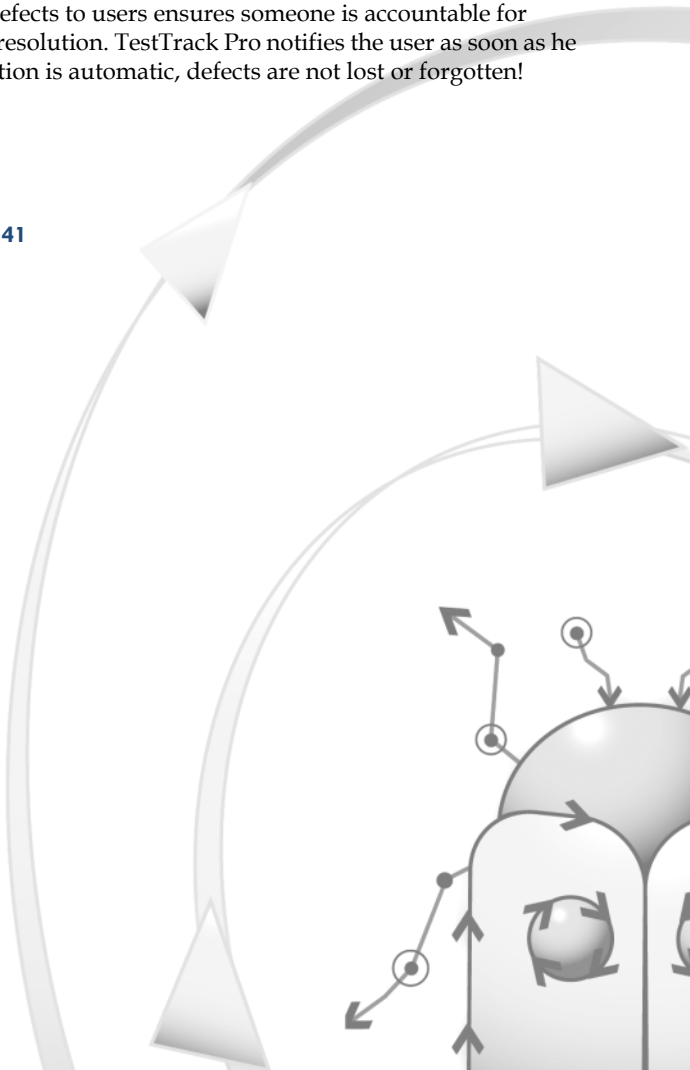
The defect is deleted.

Chapter 4
Managing the Workflow

Assign a defect…

...and get ready for some action! Assigning defects to users ensures someone is accountable for estimating, fixing, and verifying the defect's resolution. TestTrack Pro notifies the user as soon as he or she is assigned a defect. Since communication is automatic, defects are not lost or forgotten!

This section includes:



About the defect workflow

The worfklow defines the path a defect takes from initial reporting to a resolution and consists of **states**. To move a defect from state to state, the defect is assigned to users who perform the action assigned to them. The status field, on the Edit Defect dialog box, corresponds to the defect state. The status field changes based on the defect action. For example, the status field changes to Fixed when the defect is moved to the Fixed state.

State	Description
Open	The defect is added to the database.
Open (Re-opened)	The defect is re-opened.
Open (Verify Failed)	The fix failed verification.
Fixed	The defect is fixed.
Release to Testing	The defect is fixed and released to testing.
Needs Customer Verification	The fix needs to be verified by the customer. (optional)
Released to Customer Testing	The defect is fixed and ready to be tested by the customer. (optional)
Closed (Verified)	The fix is verified and the defect is closed.
Closed (Customer Verified)	The customer verified the fix and the defect is closed. (optional)
Closed (Fixed)	The defect is fixed and closed.
Closed	The defect is closed.

The TestTrack Pro administrator is generally responsible for setting the optional workflow states, such as Closed (Customer Verified). For more information, see **Setting workflow options**, page 93.

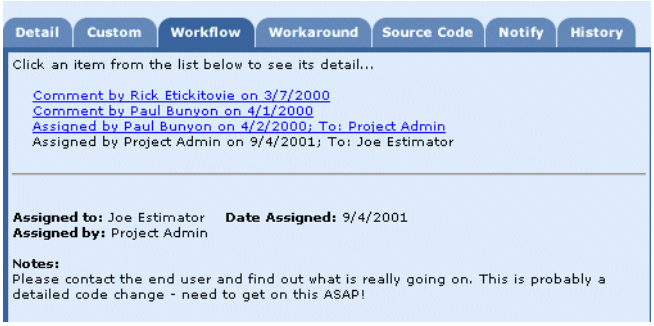
Understanding defect assignments and actions

Accountability, such as who is responsible for estimating, fixing, or verifying a fix, is an important component of defect tracking. Defects, and defect actions, are assigned to users to ensure someone is accountable and to move the defect through the workflow states. Depending on your security level and the database configuration, you may not have access to all, or some, of the defect actions.

Each company uses defect assignments and actions differently. One company might let all users assign defects. Another company might only want team leads to be responsible for assigning defects while the users are responsible for such things as estimating a fix, fixing a defect, or verifying the fix.

Following is an example of one company's use of defect actions:

The Lead Engineer is notified when a defect is added to the database. After reviewing the defect, she assigns the defect to Joe Estimator. Joe Estimator is notified of the defect assignment in two ways: the assigned defect indicator appears next to the defect on the Work with Defects page and he receives an email notification about. Joe Estimator opens the defect and clicks the Workflow tab. He can view who assigned the defect and what action he needs to perform. He enters the estimate information and moves on to his next task.



The Lead Engineer is notified when the defect changes. She reviews Joe Estimator's work and assigns the fix to Jane User. The next time Jane User logs in, she is notified of the defect assignment.

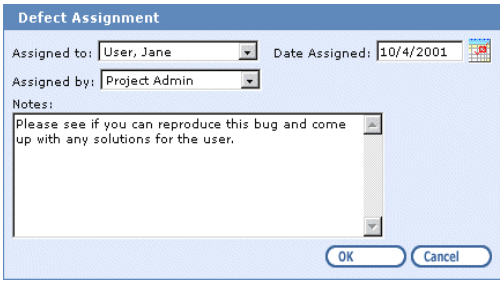
Jane User opens the defect and clicks the Workflow tab. She can view the defect assignment information and also view Joe Estimator's notes – this helps her begin working on the fix. When Jane User finishes entering the Fix Defect information, the Lead Engineer is notified that the defect changed. The Lead Engineer reviews Jane User's fix and assigns the next defect action. This process continues until the defect is fixed, tested, verified, and closed.

Assigning defects

To move a defect through its lifecycle, you need to assign the defect to a user.

1 Select the defect on the Work with Defects page. Click **Assign to User**.

The Defect Assignment dialog opens.



2 Select a user from the **Assigned to** menu.

This field defaults to the current user.

3 The **Date Assigned** field defaults to the current date.

You can enter another date or click the calendar to select a date.

4 Check the **Assigned by** field.

This field defaults to the current user or you can select a user from the menu.

5 Enter **Notes** about the defect action you are assigning or any additional information.

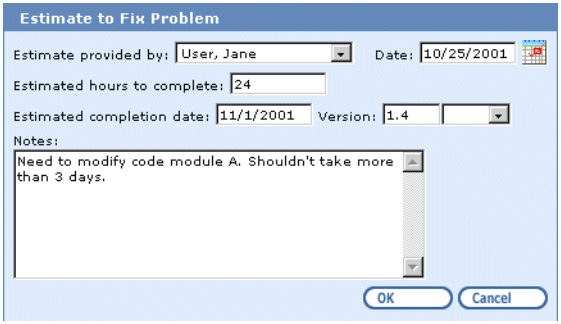
6 Click **OK**.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Estimating fix time

1 Select the defect on the Work with Defects page. Click **Estimate Fix**.

The Estimate to Fix Problem dialog opens.



2 Select a user from the **Estimate provided by** menu.

This field defaults to the current user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Enter the **Estimated hours to complete** the fix.

5 Enter the **Estimated completion** date.

6 Select a **Version** number.

7 In the **Notes** field, enter detailed notes about the estimate such as modules that need to be changed or the developer who should work on the fix.

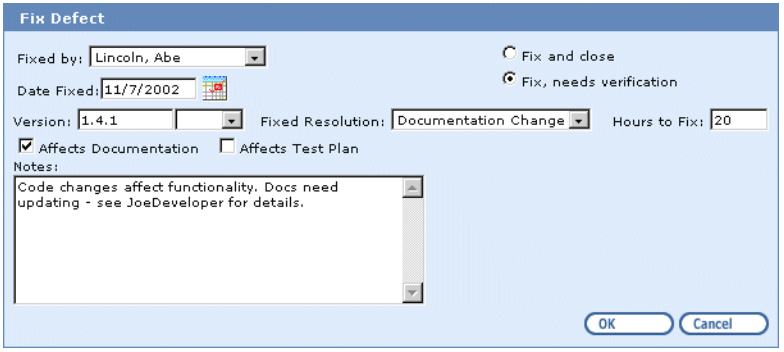
8 Click **OK**.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Fixing a defect

1 Select the defect on the Work with Defects page. Click **Fix Defect**.

The Fix Defect dialog opens.



2 Select a user from the **Fixed by** menu.

This field defaults to the current user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Select the **Version** of the product in which the defect was fixed.

5 Select a **Fix** option.

6 Select a **Fixed resolution** from the menu.

7 Enter the **Hours to Fix**.

This information is useful for future planning and estimating the time needed to fix similar defects.

8 Select the **Affects Documentation** check box or the **Affects Test Plan** check box if either applies.

9 In the **Notes** field, enter any detailed information about the fix.

10 Click **OK**.

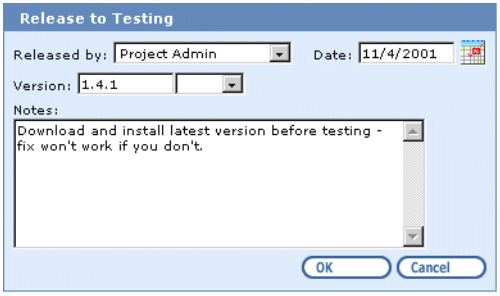
If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Releasing a fix to testing

This is an optional state in the defect workflow.

1 Select the defect on the Work with Defects page. Click **Release to Test**.

The Release to Testing dialog opens.



2 Select a user from the **Released by** menu.

This field defaults to the current user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Select the **Version** number.

5 In the **Notes** field, enter testing information such as modules that need to be tested or if the fix needs to be tested against a specific build.

6 Click **OK**.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

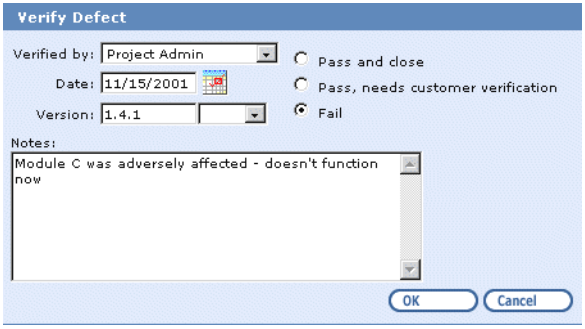
Verifying a defect fix

A defect must be fixed before it can be verified!

Verification results in one of the following outcomes: the defect **passed** verification and can be closed, the defect **passed** but needs customer verification before it can be closed, the defect **failed** the verification and still needs to be fixed.

1 Select the defect on the Work with Defects page. Click **Verify Fix**.

The Verify Defect dialog opens.



2 Select a user from the **Verified by** menu.

This field defaults to the logged in user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Select the **Version** number.

5 Select a **Verification** option.

6 In the **Notes** field, enter any additional information.

If a fix fails, record why the fix failed. It can help with future planning.

7 Click **OK**.

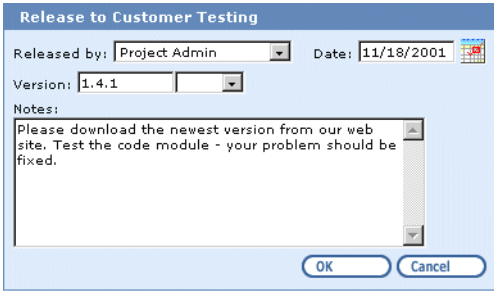
If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Releasing a fix to customer testing

This is an optional state in the defect workflow.

1 Select the defect on the Work with Defects page. Click **Rel. to Customer Test**.

The Release to Customer Testing dialog opens.



2 Select a user from the **Released by** menu.

This field defaults to the logged in user.

3 Select the **Version** number of the product.

4 Check the date.

You can enter another date or click the calendar to select a date.

5 In the **Notes** field, enter testing information such as areas in the program that need to be tested or if the fix needs to be tested against a specific build.

6 Click **OK**.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

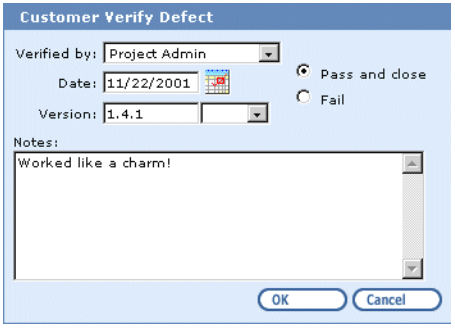
Releasing a fix to customer verification

How does this command work?

Customers, with access to the TestTrack Pro database, generally enter this information. The customers can log in to add, and verify, their defects.

1 Select the defect on the Work with Defects page. Click **Customer Verify**.

The Customer Verify Defect dialog opens.



2 Select a user from the **Verified by** menu.

This field defaults to the logged in user.

3 Select the **Version** number.

4 Check the date.

You can enter another date or click the calendar to select a date.

5 Select a **Verification** option.

- Select **Pass and close** if the fix works and the defect can be closed.
- Select **Fail** if the fix failed.

6 In the **Notes** field, enter testing information such as areas in the program that need to be tested or if the fix needs to be tested against a specific build.

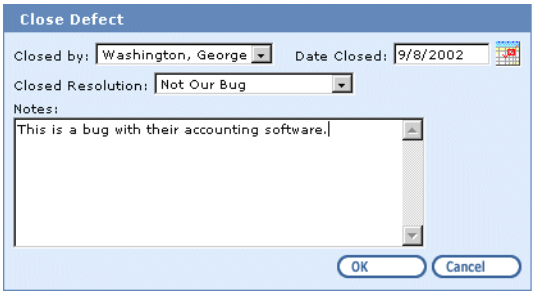
7 Click **OK**.

Closing defects

The resolution of some defects does not follow the standard fix/verify model. For example, a defect might not actually be a bug. In this situation, you can close the defect immediately, without going through the other defect actions.

1 Select the defect on the Work with Defects page. Click **Close**.

The Close Defect dialog opens.



2 Select a user from the **Closed by** menu.

This field defaults to the logged in user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Select a **Resolution**.

5 In the **Notes** field, explain why you closed the defect.

6 Click **OK**.

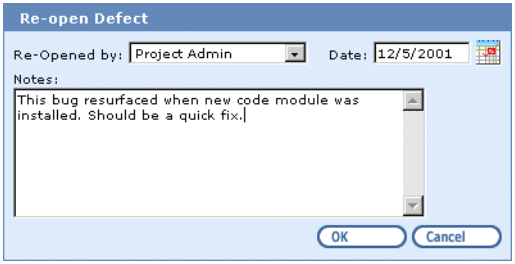
If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Re-opening a defect

Occasionally, a closed or verified defect resurfaces. To return the defect to the Open state and restart its lifecycle, you need to **re-open** the defect.

1 Select the defect on the Work with Defects page. Click **Re-open**.

The Re-open Defect dialog opens.



2 Select a user from the **Re-opened by** menu.

This field defaults to the logged in user.

3 Check the date.

You can enter another date or click the calendar to select a date.

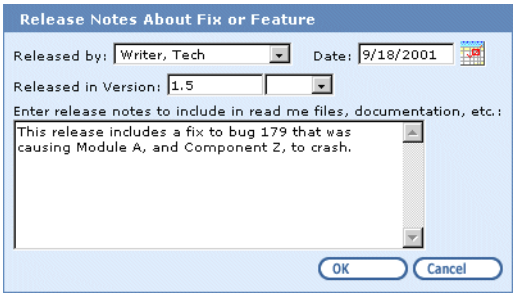
4 In the **Notes** field, explain why the defect was re-opened.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Adding release notes to a defect

1 Select the defect on the Work with Defects page. Click **Release Notes**.

The Release Notes About Fix or Feature dialog opens.



2 Select a user from the **Released by** menu.

This field defaults to the logged in user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Select the **Release in Version** number.

5 Enter the release notes.

The notes are recorded with the defect history.

6 Click **OK**.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

Generating release notes is a two-step process. After you add release notes to a defect, you need to generate the release notes. You can generate a file containing all the release notes for a specific version, date, etc. You can insert this file in your Read-me file or use it to create a separate Release Notes guide. For more information, see **Generating release notes**, page 52.

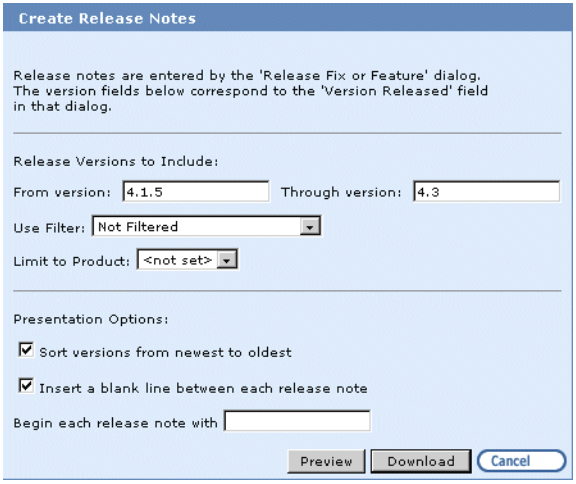
Generating release notes

You can create release notes for any defect. You may want to include the text file in a Read Me file or include the notes with your installer to inform users of new features and bug fixes. Before you can generate release notes, make sure the notes were added to the defect.

To generate release notes for just a **few defects,** select the defects on the Work with Defects page. If you do not know which defects contain release notes, add a column to the Work with Defects page to display the **Has Release Notes?** field.

1 Click **Create Rel. Notes** on the Work with Defects page.

The Create Release Notes dialog opens.



2 Enter the **From version** and the **Through version** you want to include in the release notes. If the release notes are **specific to one version**, enter the **same version number** in both of these fields.

3 Select a filter from the **Use Filter** menu to generate release notes for defects that meet the filter criteria.

4 Select a product name from the **Limit to Product** menu to generate release notes for a specific product.

5 Enter a character in the **Begin each release note with** field if you want each release note to start with the specific character (e.g., a bullet). You can also enter ASCII characters or leave the field empty.

6 Click **Preview**.

The Release Notes preview dialog opens. If you need to make changes, you can edit the release notes in the preview window.

7 Click **Download** to save the release notes.

The Save Release Notes As dialog box opens.

8 Select the directory where you want to save the release notes and enter a file name. Click **Save**.

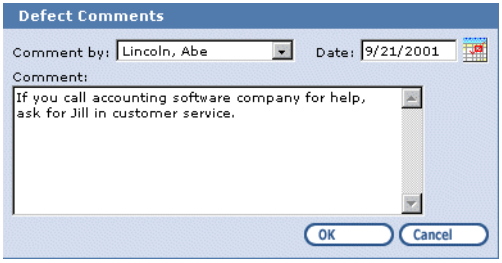
TestTrack Pro generates the release notes and saves the text file in the specified directory.

Adding comments to a defect

You can add comments to a defect to point something out to other users, clarify an issue, or just as a reminder. Other users can view your comments on the Workflow tab.

1 Select the defect on the Work with Defects page. Click **Add Comment**.

The Defect Comments dialog opens.



2 Select a user from the **Comment by** menu.

This field defaults to the current user.

3 Check the date.

You can enter another date or click the calendar to select a date.

4 Enter the comments.

The comments are recorded with the defect history.

5 Click **OK**.

If you accessed this defect action from the Edit Defect dialog, you **must** click **Save** on the Edit Defect dialog to save the changes.

To view defect comments, select the defect, click **View** or **Edit**, and then click the **Workflow** tab. All comments are included on the Workflow tab.

Viewing defect actions

Depending on your security level, you may not have access to this command.

1 Select the defect on the Work with Defects page. Click **View**.

The View Defect dialog opens.

2 Click the **Workflow** tab.

All the defect actions are listed on the Workflow tab.

3 Click the defect action you want to view. Read-only defect action information opens.

4 Click **Done** to close the View Defect dialog.

Editing defect actions

Depending on your security level, you might not have access to this command.

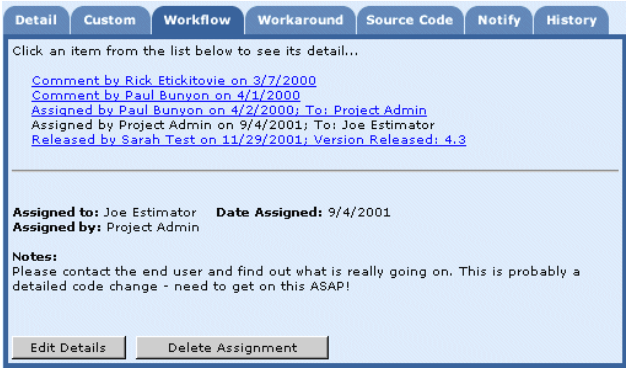
You can edit defect actions to add more information or correct mistakes. For example, a defect resolution affects documentation, but you forgot to select the Affects Documentation check box. You can edit the action to select the check box.

1 Select the defect on the Work with Defects page. Click **Edit**.

The Edit Defect dialog opens.

2 Click the **Workflow** tab.

All the defect actions are listed on the Workflow tab.



3 Click the defect action then click **Edit Details**.

The Edit Defect Assignment dialog opens.

4 Make any changes and click **OK**.

5 Click **Save**.

All changes are saved and you return to the Work with Defects page.

Deleting defect actions

1 Select the defect on the Work with Defects page. Click **Edit**.

The Edit Defect dialog opens.

2 Click the **Workflow** tab.

All the defect actions are listed on the Workflow tab.

3 Click the defect action then click **Delete <defect action>**.

The button changes based on what you are deleting. For example, if you are deleting a close action, the button is labeled **Delete Close**. Likewise, it is labeled **Delete Assignment** if you are deleting an assignment action.

Make sure you want to delete the defect action. You are not prompted to confirm the deletion and it cannot be undone!

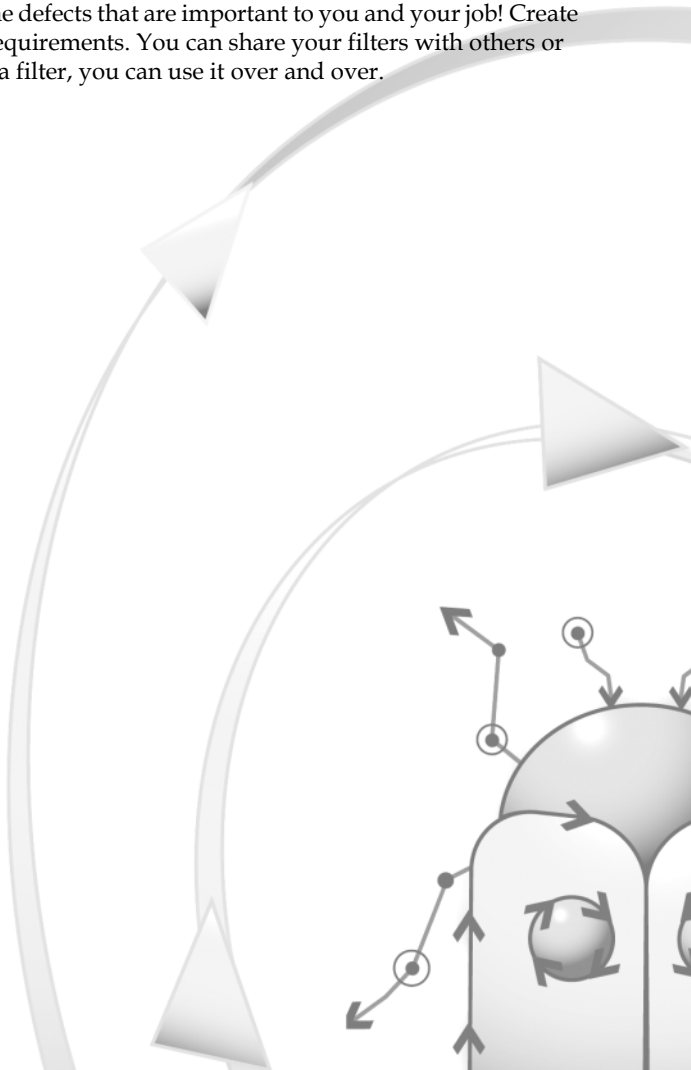
4 The defect action is deleted.

Chapter 5
Using Filters

Filter Out the Noise!

Use filters to sort your data so you only see the defects that are important to you and your job! Create as many filters as you need to handle your requirements. You can share your filters with others or you can keep them private. Once you create a filter, you can use it over and over.

This section includes:



About filters

TestTrack Pro provides extensive filtering capabilities. You can use filters to sort defect records and list only those defects that meet the criteria you select. You can create a simple filter, for example a filter that only shows fixed defects. Or, you can use Boolean logic to create more complex filters. Filters only apply to **defects**.

If your database has a large number of defects, or you only need to work with certain types of defects, you should create a filter and use it to keep your defects list manageable.

Create custom filters so you can quickly view lists of bugs. For example, you could set up filters for projects, filters to track your bugs in order of priority, to track bugs that have to be fixed for an upcoming release, etc.

About Boolean searches

You can use Boolean logic to create complex and highly precise filters. Boolean logic uses three connecting operators (AND, OR, NOT) to narrow or broaden a search or to exclude a term from a search.

And is a **narrowing** term. When you connect your filter or search criteria with the **and** operator, the filter or search returns records that match **all** of the criteria you chose. For example, if you search for Component A AND Component B, TestTrack Pro only lists defects containing both components.

Or is a **broadening** term. When you connect your filter or search criteria with the **or** operator, the filter or search returns records that match **any** of the criteria you chose. For example, if you search for Component A OR Component B, TestTrack Pro lists defects in which either term appears.

Not is an **excluding** term. When you connect your filter or search criteria with the **not** operator, the filter or search returns records that **do not** contain any of the criteria you chose. For example, if you search for NOT Component A, TestTrack Pro lists all defects except for those containing the term Component A.

Nesting - with Boolean operators

You can combine searches in a variety of ways using the different combinations of Boolean operators. Parentheses are important because they keep the logic straight. In the grouping **(Component A OR Component B) AND (Component C OR Component D)** the parentheses around the first set tells the database to create a final set of records that may include either Component A OR Component B, but only when the records also include either Component C OR Component D.

Adding filters

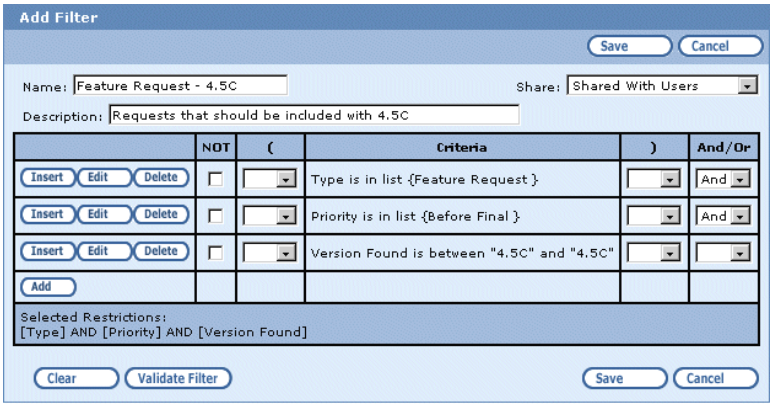
Depending on your security level, you may not have access to some or all filter commands.

1 Click the **Filters** tab.

The Work with Defect Filters page opens

2 Click **Add**.

The Add Filter dialog opens.



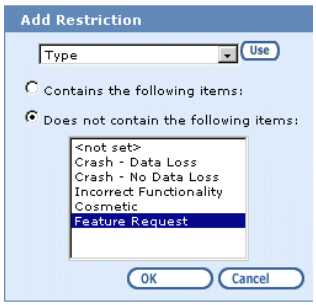
3 Enter a Filter name and description.

4 Select an option from the **Share** menu.

The default is private. If you share the filter, other users can edit the filter.

5 Click **Add** to add filter restrictions.

The Add Restriction dialog opens.



6 Select the field you want to add to the restriction from the menu.

When you select a field from the menu, the restrictions options for that field open. These options change based on the restriction you choose.

If your browser does not support JavaScript, click **Use** to refresh the screen.

7 Select any options and enter the restrictions for the field and click **OK**.

The restriction is added and you return to the Advanced Find Defects dialog.

8 Select NOT/AND/OR operators and parentheses to build the Boolean logic for the filter (optional step).

9 Click **Validate Filter** to validate the filter criteria.

If the criteria is not valid, an error is displayed on the Advanced Find Defects dialog. Correct the error and click **Validate Filter** again.

Click **Clear** to clear all restrictions and start over.

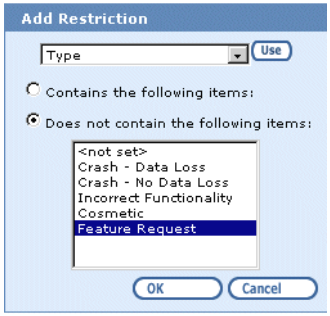
10 When you finish building the filter, click **Save**.

The filter is added to the database.

Adding restrictions

1 Click **Add** on the Advanced Find Defects dialog.

The Add Restriction dialog opens.



2 Select the field you want to add to the restriction from the menu.

When you select a field from the menu, the restrictions options for that field open. These options change based on the restriction you choose.

If your browser does not support JavaScript, click **Use** to refresh the screen.

3 Select any options and enter the restrictions for the field and click **OK**.

The restriction is added and you return to the Advanced Find Defects dialog.

4 Repeat **steps 1-3** to continue adding restrictions.

When selecting restriction options, **<Unknown>** represents an empty field. For example, if you select **<Unknown>** with Restrict by set to Assigned To, it is interpreted as "Show all defects not assigned to anyone."

When you are adding or editing restrictions with fields that include a text value, you can leave the text value empty. When the filter is applied, TestTrack Pro searches for the Restrict by field with an empty text value. This is useful if you are cleaning up your defect records and want to make sure that every defect includes a summary. Select **Restrict by: Summary** and leave the text value empty. When you apply the filter, all defects with an empty Summary field are listed.

Editing restrictions

1 Click **Edit** on the Advanced Find Defects dialog.

The Edit Restriction dialog opens.

2 Make any changes and click **OK**.

Inserting restrictions

If your filter contains a large number of restrictions, you can insert a restriction in a specific position.

1 Click **Insert** in the row you want to insert a restriction above.

The Insert Restrictions dialog opens.

2 Select the field you want to include from the menu.

3 Select any options and enter the restrictions for the field. Click **OK**.

The restriction is inserted.

Deleting restrictions

Make sure you want to delete the restriction. You are not prompted to confirm the deletion and this action cannot be undone!

1 Click **Delete** on the Advanced Find Defects dialog, in the row corresponding to the restriction you want to delete.

The restriction is deleted.

Using filters

1 On the Work with Defects page, select a filter from the **Filter** menu.

If your browser does not support JavaScript, click **Use** to refresh the screen and update the Filter list.

2 The filter is applied to the defects.

Defects that meet the filter criteria are listed on the Work with Defects page. To return to a list of all defects, select **Not Filtered** from the Filter list.

Viewing filters

1 Click the **Filters** tab.

2 Select the filter and click **View**.

The View Filter dialog opens. All fields are read-only.

3 Click **Close** when you are finished.

Editing filters

1 Click the **Filters** tab.

2 Select the filter and click **Edit**.

3 Make any changes and click **Save**.

Your changes are saved and you return to the Work with Defect Filters page.

Duplicating filters

If you are adding filters with similar restrictions, you can save time by duplicating and modifying a filter.

1 Click the **Filters** tab.

2 Select the filter and click **Duplicate**.

TestTrack Pro duplicates the filter(s).

3 Modify the filter and save your changes.

Deleting filters

1 Click the **Filters** tab.

2 Select the filter and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

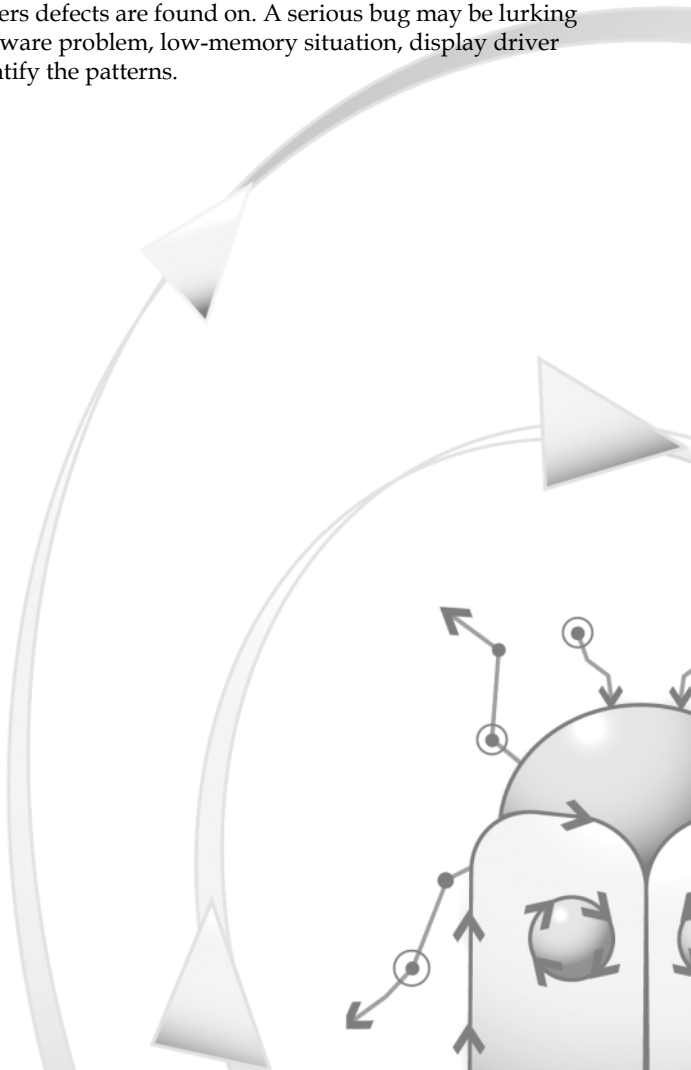
The filter is deleted.

Chapter 6
Managing Test Configs

Track the nuts and bolts!

It's important to pay attention to the computers defects are found on. A serious bug may be lurking on a specific test configuration. Is this a hardware problem, low-memory situation, display driver bug? Track your test configurations and identify the patterns.

This section includes:



About test configs

A test configuration simply refers to a specific computer used for testing. You may want to keep track of all your systems to see if bugs are computer-specific. Tracking test configurations helps you identify patterns in defects that may be related to specific hardware configurations or software configurations.

Adding test configs

Depending on your security level, you might not have access to some or all Test Config commands.

1 Click the **Test Configs** tab.

The Work with Test Configs page opens.

2 Click **Add**.

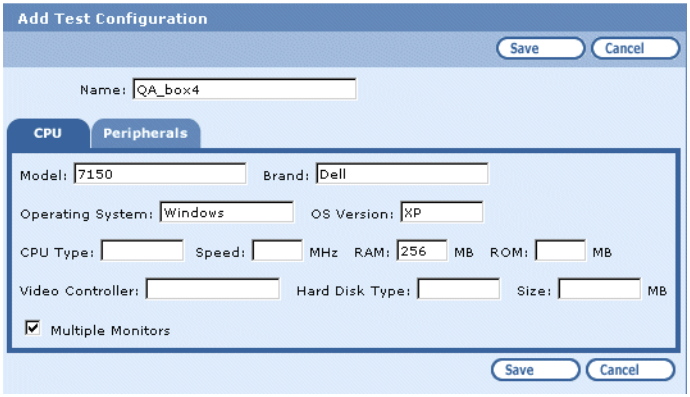
The Add Test Configuration dialog opens.

3 Enter a test config **Name**.

This name should uniquely identify a single computer.

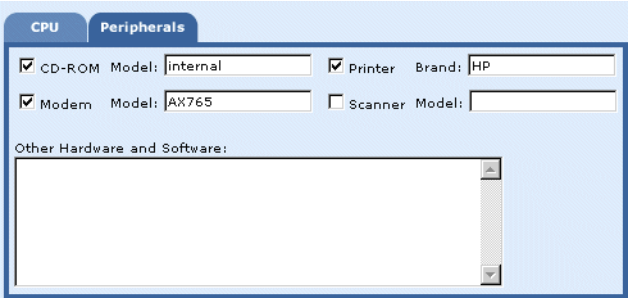
4 Enter the information on the **CPU** tab.

These fields are optional but you should enter as much information as possible.



5 Click the **Peripherals** tab and enter the peripherals information.

These fields are optional but you should enter as much information as possible.



6 When you finish entering the test config information, click **Save**.

The test config is added to the database.

Viewing test configs

1 Click the **Test Configs** tab.

2 Select the test config and click **View**.

The View Test Configuration dialog opens. All fields are read-only.

3 Click **Close** when you are finished.

Editing test configs

1 Click the **Test Configs** tab.

2 Select the test config and click **Edit**.

The Edit Test Configuration opens.

3 Make any changes and click **Save**.

Your changes are saved.

Duplicating test configs

If you are adding similar test configs, you can save time by duplicating and modifying a test config.

1 Click the **Test Configs** tab.

2 Select the test config and click **Duplicate**.

The test config is duplicated. A number, incremented by 1, is added to the end of the name. For example, if you select and duplicate Eng-cube, the duplicated test config is named Eng-cube1.

3 Modify the test config and save your changes.

Deleting test configs

1 Click the **Test Configs** tab.

2 Select the test config and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

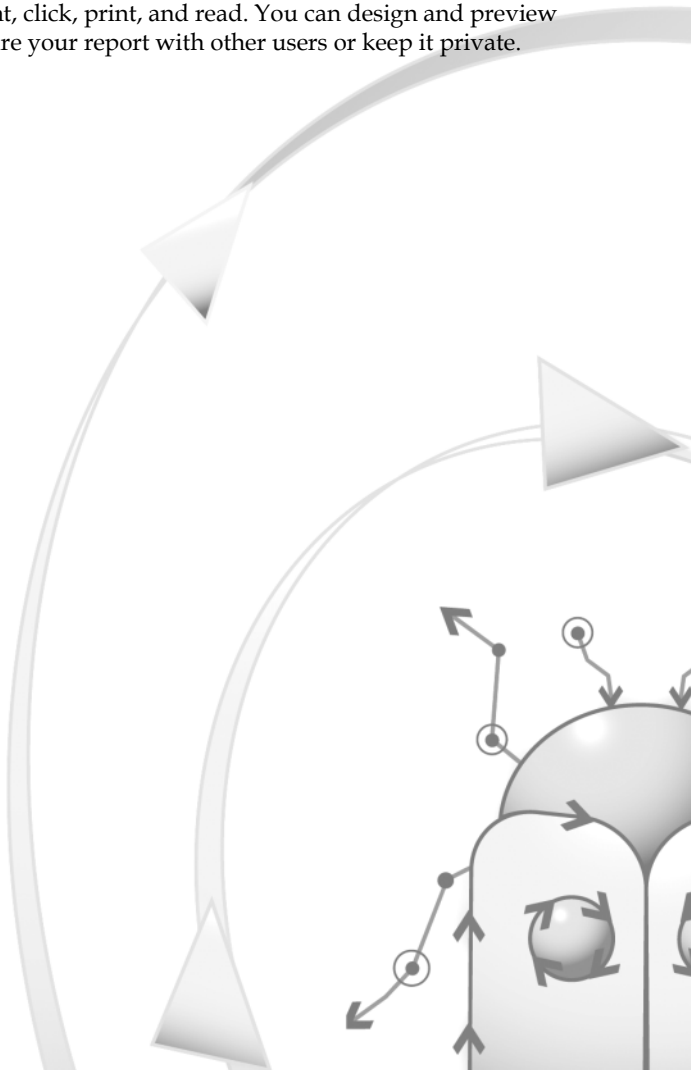
The test config is deleted.

Chapter 7
Generating Reports

Analyze and Report!

TestTrack Pro makes reporting simple—point, click, print, and read. You can design and preview each report before printing. You can also share your report with other users or keep it private.

This section includes:



About reports

Reports are used to analyze the data collected in your database. You can use filters to build reports that focus on the data you need. You can also share your reports with others or keep them private. You can create the following four kinds of reports:

- **Detail reports** include detailed information about defects, customers, users, user groups, or test configurations.
- **Distribution reports** include the distribution of defects. You can choose options such as defects found by user, defect status by component, etc. You can add a chart to the report for additional impact. For example, you could build a distribution report that shows the number of fixed defects for each user.
- **List reports** include summary information about defects, customers, users, user groups, or test configurations. You select the fields to include in the report.
- **Trend reports** include defect events over time. For example, how many defects have been fixed this week? You can add a chart to the report for additional impact. Use this report to determine how well you are managing defects.

Using stylesheets

Stylesheets are templates you can use to quickly generate formatted reports. Several Extensible Style Language (XSL) stylesheets are installed with TestTrack Pro to help you easily create reports with predefined layout and design options. The stylesheets are available to all TestTrack Pro users with access to the database.

Customizing stylesheets

You can customize an existing XSL stylesheet or create your own and add it to the TestTrack Pro database. Stylesheets are generally located in the **Program Files/TestTrack Pro/StyleSheets** directory or the **Program Files/ Seapine/ TestTrack Pro/ Stylesheets** directory. Each report type has a corresponding folder in the Stylesheets directory.

- To customize an existing stylesheet, open the corresponding report folder, select the stylesheet, and modify it using a third-party tool, such as Altova's XML Spy.
- To add a new stylesheet, use a third-party tool to create the stylesheet. Copy the completed stylesheet to the corresponding report folder.
- To include an image with a stylesheet, copy the image to the **Images** folder in the TestTrack Pro directory. Include the following script in the stylesheet:

```
<img>
  <xsl:attribute name="src">
      <xsl:value-of select="external:get-server-image('imagename.gif')" />
  </xsl:attribute>
</img>
```

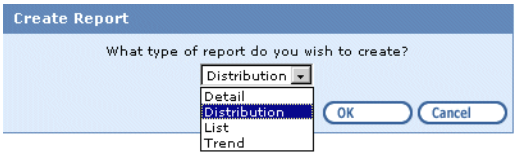
Creating detail reports

1 Click the **Reports** tab.

The Work with Reports page opens.

2 Click **Add**.

The Create Report dialog opens.



3 Select **Detail** and click **OK**.

The Add Detail Report dialog opens.

4 Enter a **Name** and **Title**.

The title appears at the top of the report when it is viewed or printed.

5 Select an option from the **Share** menu.

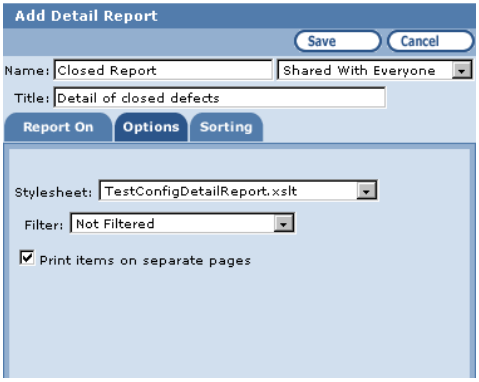
If you share the report, users with the proper command-level security can edit the report. Select **Private** to protect your report.

6 Select the **Report On** options.

- Select the record type from the **Report contains** menu.
- If you select **Customers**, **Users**, **User Groups**, **Customers**, or **Test Configs** you can build a report on all, or selected, records.

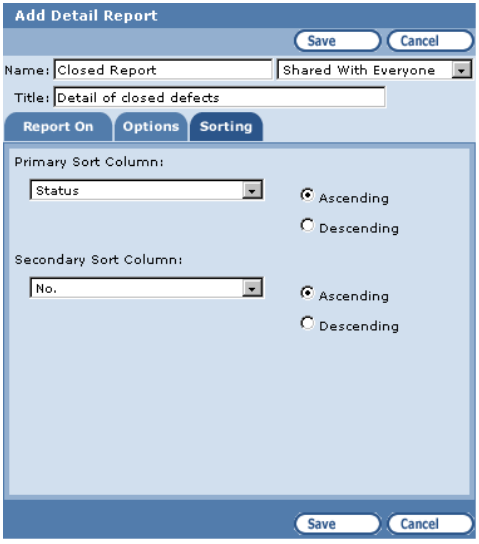
7 Click the **Options** tab.

- Select a stylesheet from the **Stylesheet** menu.
- Optionally, select a **Filter** if you are reporting on defects. Defects that pass the filter are included in the report.
- Select **Print items on separate pages** if you want page breaks between each item in the report. Internet Explorer is the only browser that supports page breaks.



8 Click the **Sorting** tab.

Optionally, select a Primary and Secondary sort column. You can also set the column sort order.



9 Click **Save**.

The Add Detail Report dialog clears. You can add another report if you want.

Creating distribution reports

1 Click the **Reports** tab.

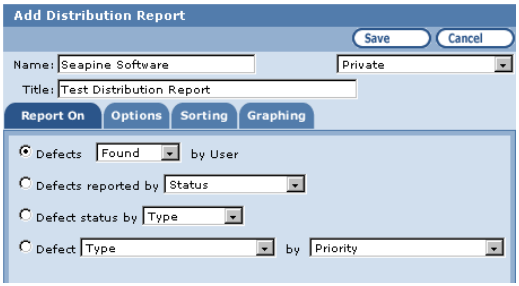
The Work with Reports page opens.

2 Click **Add**.

The Create Report dialog opens.

3 Select **Distribution** and click **OK**.

The Add Distribution Report dialog opens.



4 Enter a **Name** and **Title**.

The title appears at the top of the report when it is viewed or printed.

5 Select an option from the **Share** menu.

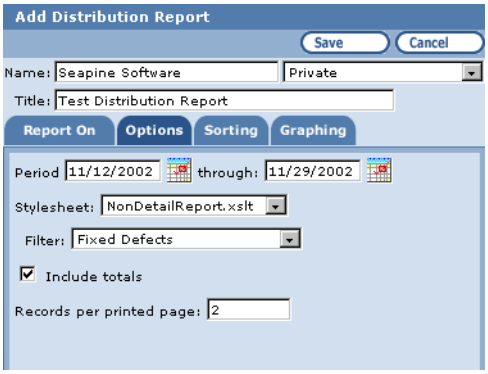
If you share the report, users with the proper command-level security can edit the report. Select **Private** to protect your report.

6 Select the **Report On** options.

- Select **Defects <field> by User** to build a report that includes action by user. For example, Defects Found by User.
- Select **Defects report by <field>** to build a report that includes the number of defects based on the chosen category. For example, Defects reported by Status.
- Select **Defect status by <field>** to build a report that includes the defect status based on the chosen category. For example, Defects status by Type.
- Select **Defect <field> By <field>** to build a report that includes the defect status using two criteria. For example, Defect Type by Priority.

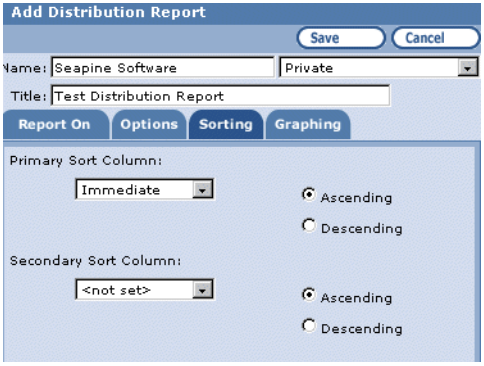
7 Click the **Options** tab.

- Enter the date parameters for your report in the **Period** and **through** fields.
- Select a stylesheet from the **Stylesheet** menu.
- Optionally select a **Filter** if you are reporting on defects. Defects that pass the filter are included in the report.
- Select **Include totals** to include totals for the selected report items. If you select this option, you can add the totals to a chart using the **Data to Graph** menu on the **Graphing** tab. Totals cannot be graphed with any other report items.



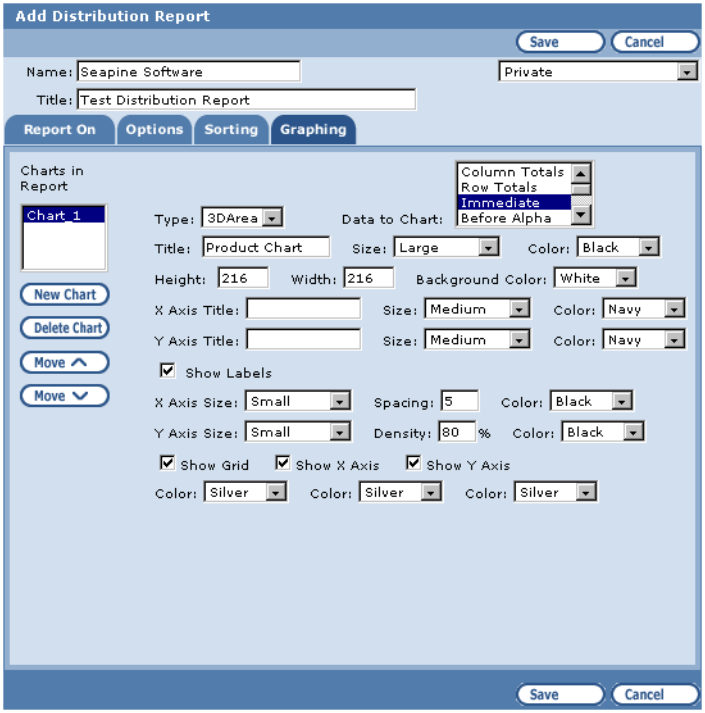
8 Click the **Sorting** tab.

Optionally select a Primary and Secondary sort column. You can also set the column sort order.



9 Click the **Graphing** tab.

This tab is used to add and design charts. For more information, see **Charting report data,** page 80.



10 Click **Save**.

The Add Distribution Report dialog clears. You can add another report if you want.

Creating list reports

1 Click the **Reports** tab.

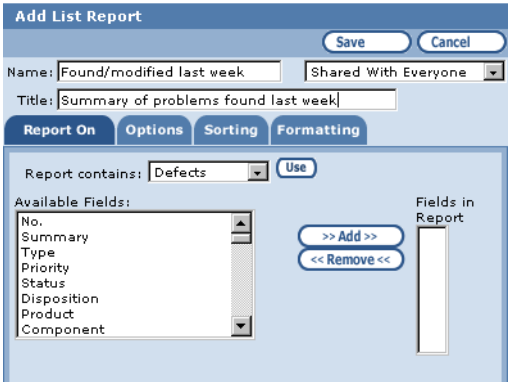
The Work with Reports page opens.

2 Click **Add**.

The Create Report dialog opens.

3 Select **List** and click **OK**.

The Add List Report dialog opens.



4 Enter a **Name** and **Title**.

The title appears at the top of the report when it is viewed or printed.

5 Select an option from the **Share** menu.

If you share the report, users with the proper command-level security can edit the report. Select **Private** to protect your report.

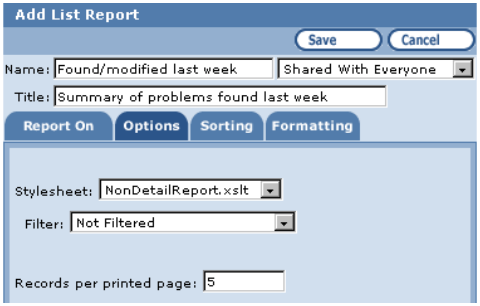
6 Select the **Report On** options.

- Select the record type from the **Report contains** menu.
- Select the fields from the **Available Fields** list and click **Add**.

7 Click the **Options** tab.

- Select a stylesheet from the **Stylesheet** menu.
- Optionally, select a **Filter** if you are reporting on defects. Defects that pass the filter are included in the report.

- Enter a number in the **Records per printed page** to set page breaks for the report.

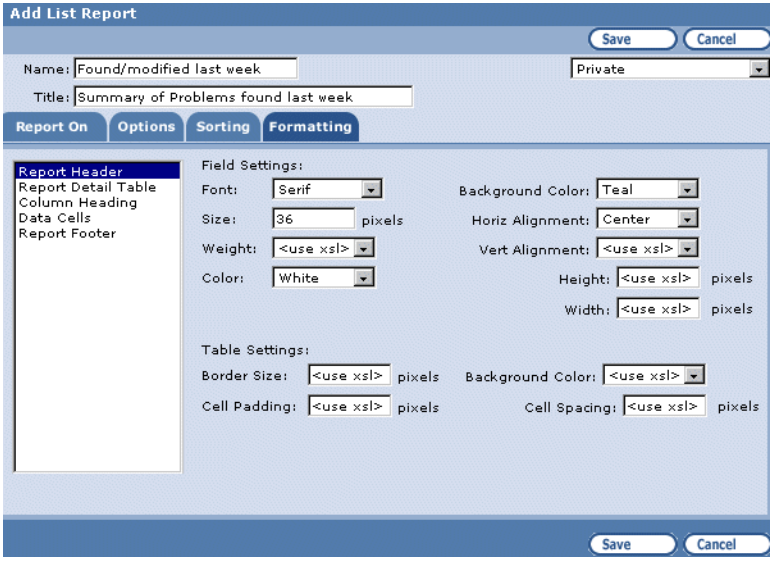


8 Click the **Sorting** tab.

Optionally select a Primary and Secondary sort column. You can also set the column sort order.

9 Click the **Formatting** tab.

You can override the stylesheet settings for a list report. For example, you can change the header font style, size, color, or alignment. Select **Report Header** and use the field settings to make any adjustments.



10 Click **Save**.

The Add List Report dialog clears. You can add another report if you want.

Creating trend reports

1 Click the **Reports** tab.

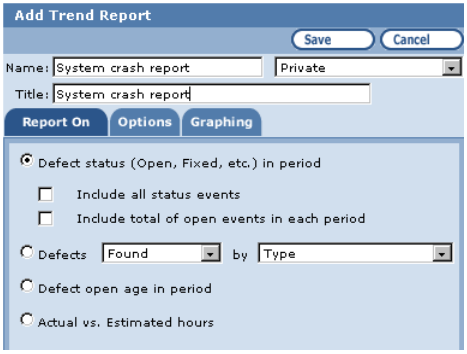
The Work with Reports page opens.

2 Click **Add**.

The Create Report dialog opens.

3 Select **Trend** and click **OK**.

The Add Trend Report dialog opens.



4 Enter a **Name** and **Title**.

The title appears at the top of the report when it is viewed or printed.

5 Select an option from the **Share** menu.

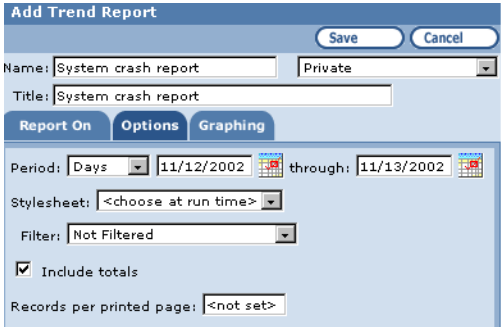
If you share the report, users with the proper command-level security can edit the report. Select **Private** to protect your report.

6 Select the **Report On** options.

- Select **Defect status in period** to report the number of defects in each state (Open, Fixed, etc.) over the specified reporting period.
- Select **Defects <field> by <field>** to report on the number of defects that are Open, Fixed, Closed, etc. by Type, Priority, or Resolution.
- Select **Defect open age in period** to report on the number of defects open over the specified period.
- Select **Actual vs. Estimated hours** to report on the difference between the actual and estimated fix time.

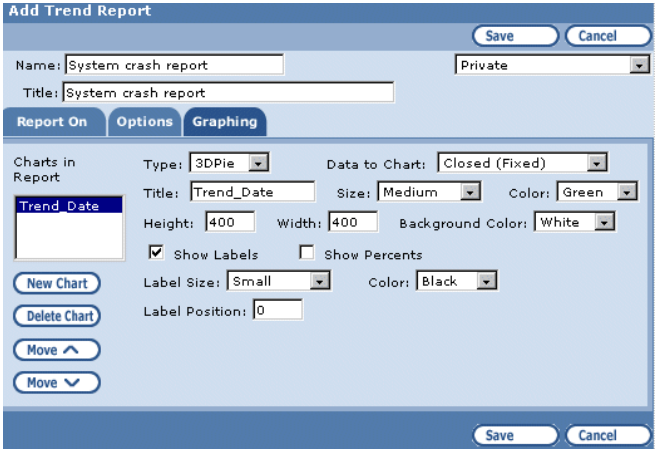
7 Click the **Options** tab.

- Select a unit from the **Period** menu and enter the date parameters.
- Select a stylesheet from the **Stylesheet** menu.
- Optionally, select a **Filter** if you are reporting on defects. Defects that pass the filter are included in the report.
- Select **Include totals** to include totals for the selected report items. If you select this option, you can add the totals to a chart using the **Data to Graph** menu on the **Graphing** tab. Totals cannot be graphed with any other report items.
- Enter a number in the **Records per printed page** field to set page breaks for the report.



8 Click the **Graphing** tab.

This tab is used to add and design charts. For more information, see **Charting report data,** page 80.



9 Click **Save**.

The Add Trend Report dialog clears. You can add another report if you want.

Charting report data

You can add charts to distribution and trend reports. The available charts include pie, 3D pie, bar, 3D bar, area, 3D area, line, and 3D line.

Bar, area, and line charts

The following fields are used to design bar, area, or line charts.

Graphing field:	Use to:
Type	Select the type of report
Data to Chart	Select report data
Title	Enter a chart title
Size	Select the chart title size
Color	Select the chart title font color
Height	Select the chart height
Width	Select the chart width
Background Color	Select the chart background color
X Axis Title	Enter an X axis title
Y Axis Title	Enter a Y axis title
Size	Select the X and Y axis title size
Color	Select the X and Y axis title font colors
Show Labels	Show chart component labels
X Axis Size	Select the X axis label size
Y Axis Size	Select the Y axis label size
Spacing	Enter the amount of space you want, in pixels, between labels
Color	Select the X and Y axis label colors
Density	Enter a density percentage. 80% displays all labels, 40% displays half, etc.
Show Grid	Select to show the chart grid pattern
Show X Axis	Select to show the X axis
Show Y Axis	Select to show the Y axis
Color	Select the color for the grid lines and the X and Y axis lines

Pie charts

The following fields are used to design pie charts.

Graphing field:	Use to:
Type	Select pie or 3D pie
Data to Chart	Select report data
Title	Enter a chart title
Size	Select the chart title size
Color	Select the chart title font color
Height	Select the chart height
Width	Select the chart width
Background Color	Select the chart background color
Show Labels	Show chart data labels
Show Percents	Show chart data in percents
Label Size	Select the chart label size
Color	Select the label colors
Label Position	Set the spacing of the pie chart labels

Pie charts are scaled based on a number of factors, including image size, label size, and number of labels. You may need to change the image height and width dimensions for the pie chart to display correctly.

Viewing report settings

1 Check the report on the Work with Reports page.

2 Click **View**.

The View Report dialog opens. All fields are read-only.

3 Click **Done** when you are finished.

Running reports

1 Click the report on the Work with Reports page.

2 Click **Run**. 

The report opens in a new browser window.

3 Depending on the browser you are using, you can print the report, export the data, save the report to view later, or simply close the report are you view it.

Running quick reports

You can run a quick detail or list report from the Work with Defects page. These reports cannot be customized.

1 Select the defects you want to include on the Work with Defects page.

2 Click **Detail Report** or **List Report**.

The report runs automatically and opens in a new browser window.

Editing reports

1 Click the report on the Work with Reports page.

2 Click **Edit**.

The Edit Report dialog opens.

3 Make any changes and click **Save**.

Your changes are saved and you return to the Work with Reports page.

Duplicating reports

If you are creating reports with similar information, duplicate and modify a report to save time.

1 Click the **Reports** tab.

2 Select the report and click **Duplicate**.

The report is duplicated.

3 Modify the report and save your changes.

Deleting reports

1 Click the report on the Work with Reports page.

2 Click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

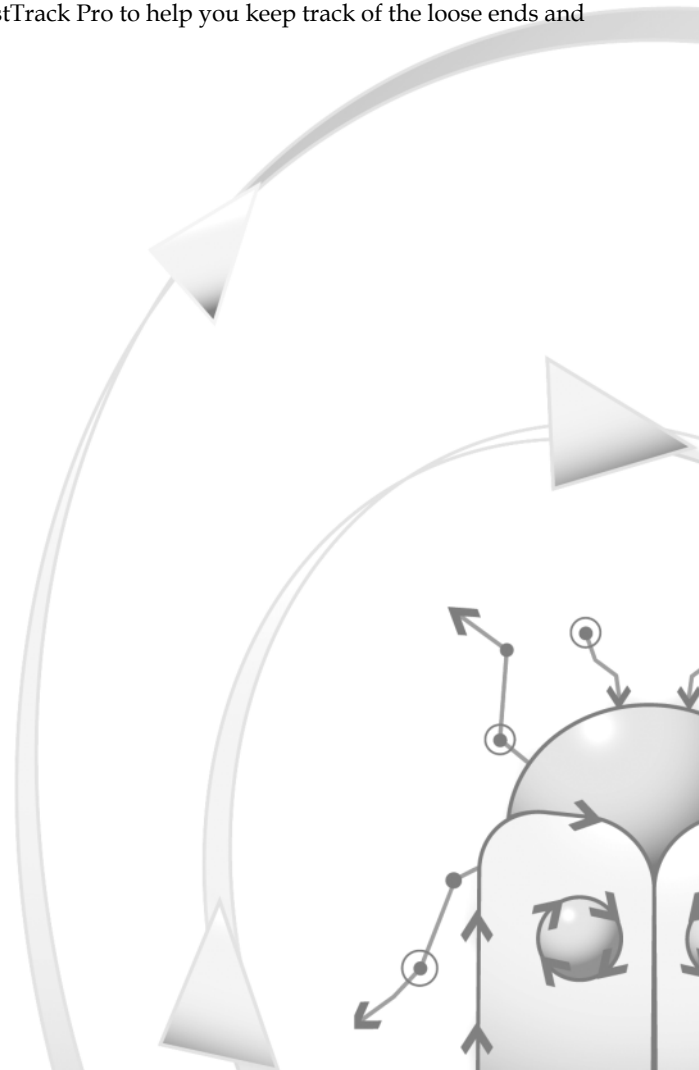
The report is deleted.

Chapter 8
Using the Workbook

So much to do!

So little time to do it? Not when you use TestTrack Pro to help you keep track of the loose ends and organize other project-related tasks.

This section includes:



About the workbook

Use the TestTrack Pro Workbook to help you keep track of your defects, loose ends, and other tasks. For example, you can add To Do tasks to remind you about meetings are upcoming deadlines.

About workbook tasks

You can track defect tasks and To Do tasks in the Workbook. Defects are automatically added to the Workbook. You add To Do tasks to your Workbook. To Do tasks are listed as reminders in the Type column

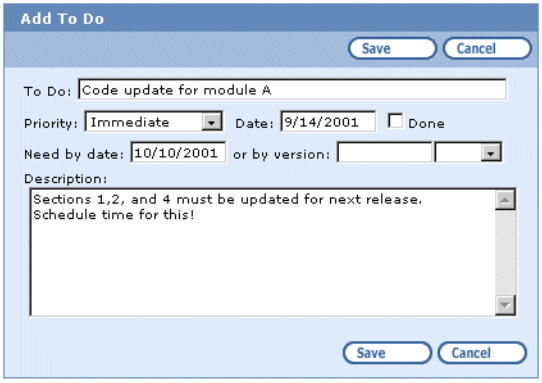
Adding tasks

1 Click the **Workbook** tab.

The Work with Workbook page opens.

2 Click **Add**.

The Add To Do dialog opens.



3 Enter a task name in the **To Do** field.

4 Select the task priority from the **Priority** menu.

5 Check the date.

6 Select a **Need by date** or **Version**.

7 Enter a **description**.

8 Click **Save**.

The dialog clears and you can add another task.

Viewing tasks

1 Click the **Workbook** tab.

2 Select the task and click **View**.

The View To Do dialog opens. All fields are read-only.

3 Click **Close** when you are finished.

Editing tasks

1 Click the **Workbook** tab.

2 Select the task and click **Edit**.

The Edit To Do dialog opens.

3 Make any changes and click **Save**.

Your changes are saved and you return to the Work with Workbook page.

Select the **Done** check box if you completed the task. The status changes from Open to Done.

Duplicating tasks

To save time entering tasks, duplicate and modify a similar task.

1 Click the **Workbook** tab.

2 Select the task and click **Duplicate**.

The task is duplicated.

3 Modify the task and save your changes.

Deleting tasks

You can only delete **tasks.** You cannot delete **defects.**

1 Click the **Workbook** tab.

2 Select the task and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

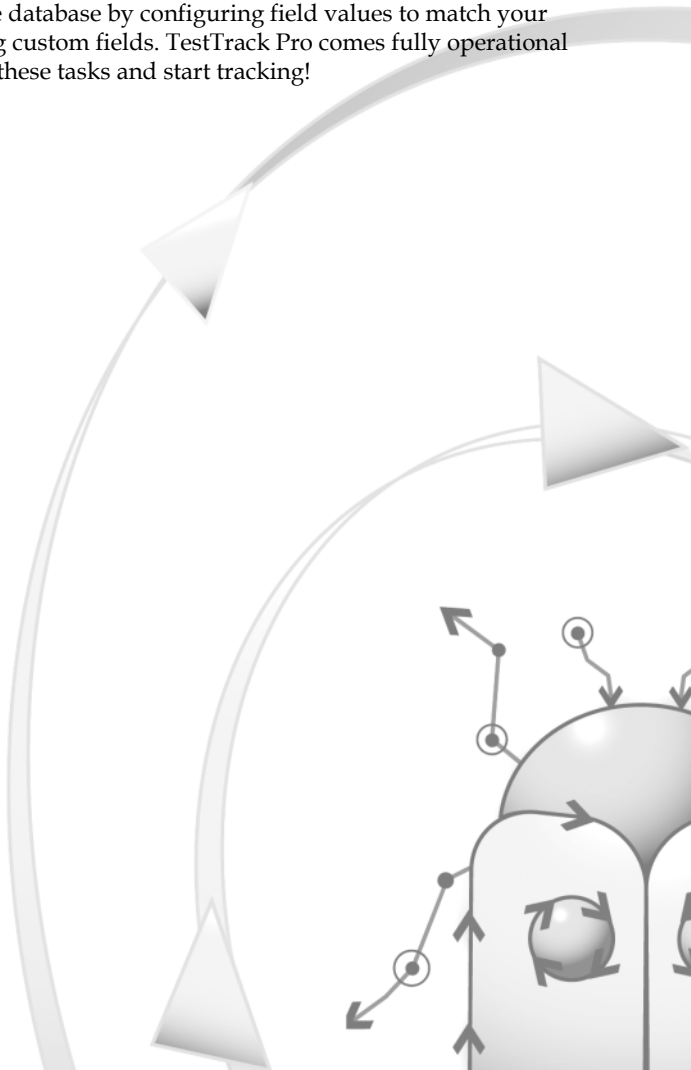
The task is deleted.

Chapter 9
Configuring Databases

Lay the foundation!

Sound hard? It's not—you can customize the database by configuring field values to match your organization's terminology or by configuring custom fields. TestTrack Pro comes fully operational with generic default values, so you can skip these tasks and start tracking!

This section includes:



About databases

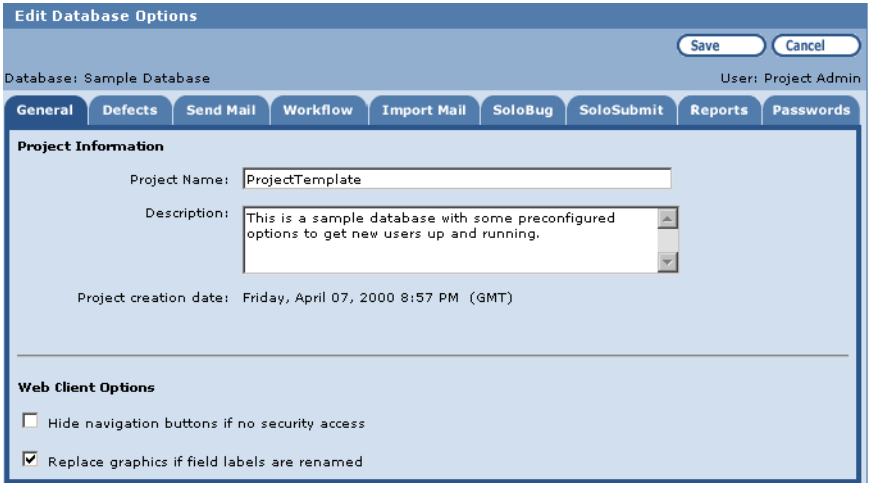
A TestTrack Pro database contains all the information you track such as defects, user groups, users, customers, test configurations, filters, and workbook tasks. Database are created using the Server Admin Utility. For more information, refer to the **Server Admin Utility Guide**.

Setting general options

1 Click the **Configure** tab.

2 Click **Database Options**.

The Edit Database Options dialog opens, with the **General** tab selected.



3 Enter project information.

Enter a **Project Name** and **Description**. Entering a project name does not change the database name.

4 Select **Hide navigation buttons if no security access** to hide the web navigation buttons.

If a user does not have security access to the navigation buttons, the buttons are hidden on the web page. If this option is not selected, and the user does not have security access, the buttons are disabled.

5 Select **Replace graphics if field labels are renamed** to automatically replace the corresponding field label graphics.

Do not select this option if you use custom graphics for renamed fields.

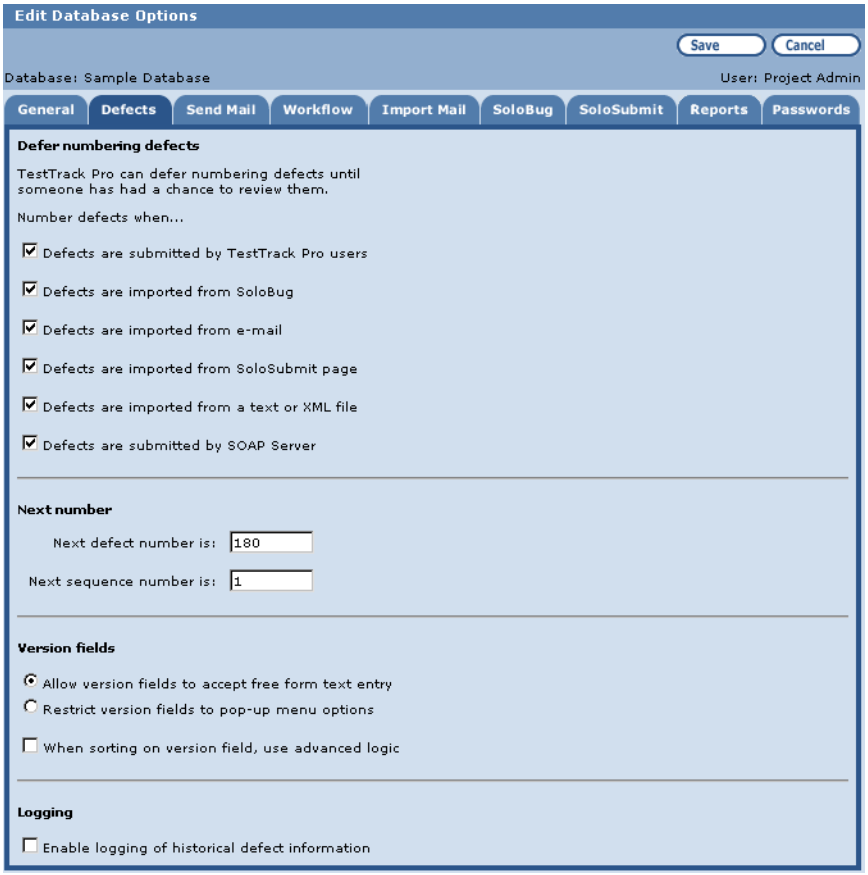
6 Click **Save** or click another tab to continue setting options.

Setting defect options

1 Click the **Configure** tab.

The Project Configuration page opens.

2 Click **Database Options** then click the **Defects** tab.



3 Select the **Defer numbering defects** options.

Select the check box if you want a defect number automatically assigned. If a defect number is not automatically assigned, a dash appears in the No. column on the Work with Defects page.

4 Select the **Next number** options.

- The next defect number can be set to any value greater than the largest defect number.
- The next sequence number can be set to any value greater than the largest sequence number.

5 Select the **Version fields** options. These options affect the following fields: version found, version fixed, version verified, version released, and estimated completion.

- **Allow version fields to accept free form text entry** lets the user choose a value from the pop-up menu or enter a value. For example, if you are doing a daily build during testing, you may want your users to type the current build number in the version field
- **Restrict version fields to pop-up menu options** forces the user to choose a value from the pop-up menu.
- **When sorting on version field, use advanced logic** tells TestTrack Pro to look for delimiters, such as a dash (-) or a period (.), and sort the alphanumeric characters in that section. This is repeated until all alphanumeric characters are sorted.

6 Select **Enable logging of historical defect information** to log historical information.

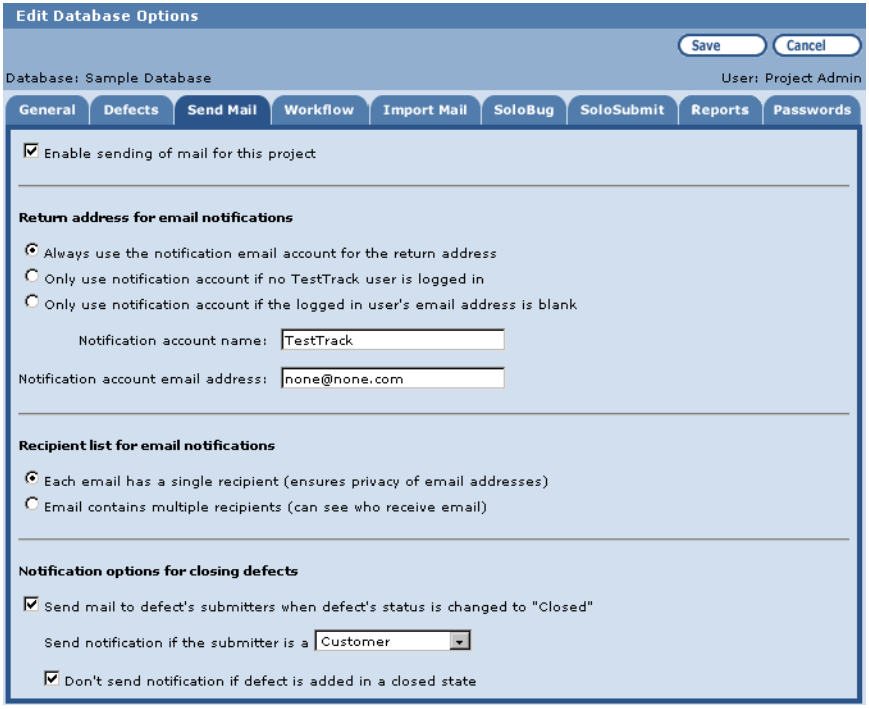
For more information, see **Enabling historical defect logging,** page 105.

7 Click **Save** or click another tab to continue setting options.

Setting send mail options

1 Click the **Configure** tab.

2 Click **Database Options** then click the **Send Mail** tab.



3 Select **Enable sending of mail for this project** to enable mail.

If you do not select this option, users cannot send mail or receive email notifications.

4 Select the **Return address for email notifications** options.

- **Always use the notification email account for the return address** is the default option.
- **Only use notification account if no TestTrack user is logged in** uses the notification account information. if a user is not logged in.
- **Only use notification account if the logged in user's email address is blank** ensures that an email address is available if the logged in user did not provide an email address.
- Enter a **notification account name** and **email address**.

5 Select the **Recipient list for email notifications** options.

If privacy is an issue, select **Each email has a single recipient**. If you select **Email contains multiple recipients**, each person who receives an email can view the list of recipients and their email addresses.

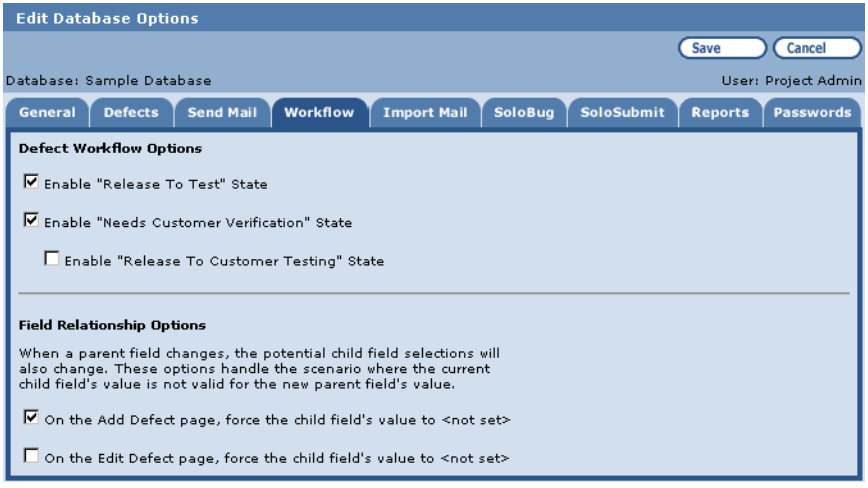
6 Select the **Notification options for closing defects**.

7 Click **Save** or click another tab to continue setting options.

Setting workflow options

1 Click the **Configure** tab.

2 Click **Database Options** then click the **Workflow** tab.



3 Select the **Defect Workflow Options**.

- **Enable "Release to Test" State** moves the defect into the Release to Testing state where the fix must be tested.
- **Enable "Needs Customer Verification" State** adds the customer verification state to the workflow. This indicates the defect is fixed and needs customer verification.
- **Enable "Release to Customer Testing" State** adds the customer testing state to the workflow. This indicates the defect is fixed and needs to be tested by the customer.

4 Select the **Field Relationship Options**.

These options force a child field's value to **<not set>** if a parent field changes and the child field value is no longer valid.

- When a defect is added, you want to enforce the field relationship and prevent data that does not make sense from being entered. In this case, you want to force the child field's value to **<not set>** on the Add Defect dialog.
- If a defect is edited, it might be more important to keep the original information so you do not lose historical defect information. In this case, you probably do not want to force the child field's value to **<not set>** on the Edit Defect dialog. For more information, see **Configuring custom fields,** page 111.

If you set **Version Found** as a child field, and you lets users enter text for the version field, the value cannot be forced to **<not set>**. Field relationship rules cannot be enforced since the user can enter a field value. Allowing users to enter text in version fields makes field relationships a less powerful feature.

5 Click **Save** or click another tab to continue setting options.

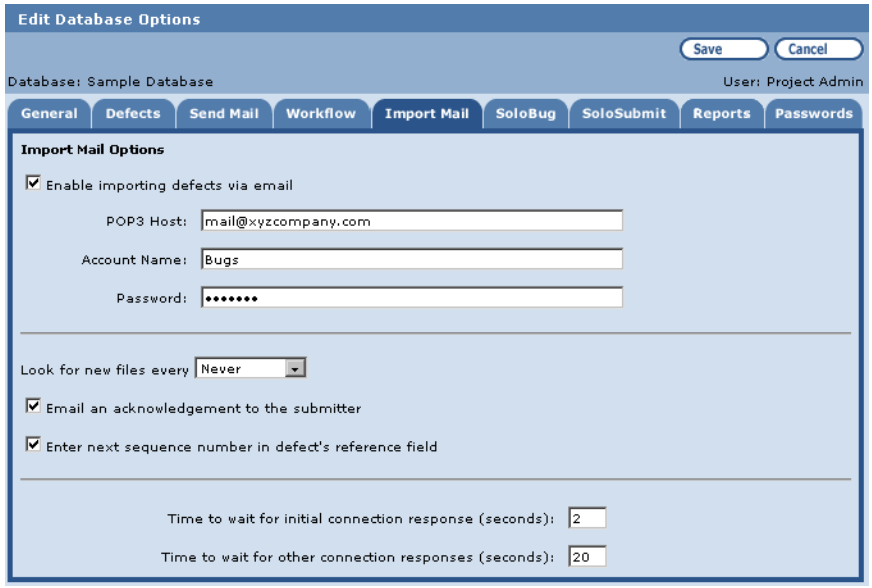
Setting import mail options

TestTrack Pro can automatically import mail from most email accounts. Customers and users can send defect reports directly to this email; TestTrack Pro will automatically import the defects!

TestTrack Pro requires a dedicated email address for importing mail. All email, including personal email such as jokes, is imported into the database.

1 Click the **Configure** tab.

2 Click **Database Options** then click the **Import Mail** tab.



3 Select **Enable importing defects via Internet email** to import defects via email.

4 Enter the IP address or domain name of your **POP3 host**.

5 Enter the **Account Name** and **Password**, if needed.

6 Select a time interval from the **Look for new files every** menu.

You can override the selected interval at any time. Choose **File > Import > Perform Server Import**.

7 Select **Email an acknowledgement to the submitter** to automatically acknowledge the email.

8 Select **Enter next sequence number in defect's reference field** to automatically enter the next defect sequence number.

9 Enter the **Time to wait for initial connection response**.

This is the time the TestTrack Pro server waits for an initial response from the email server.

10 Enter the **Time to wait for other connection responses**.

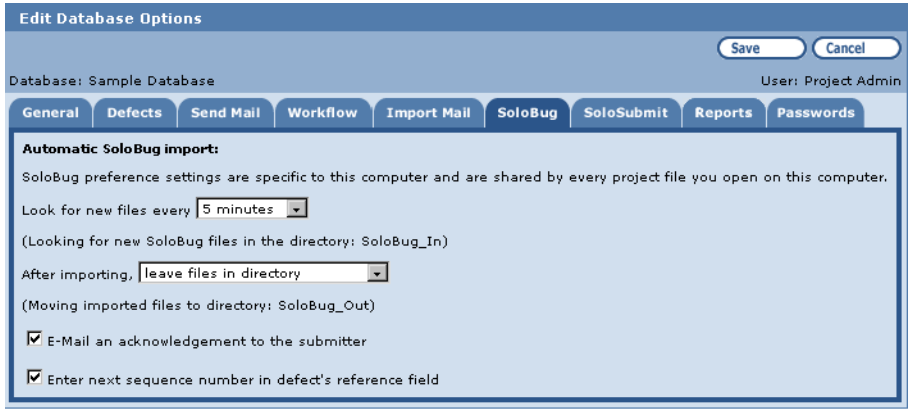
This is the time the TestTrack Pro server waits for other connection responses from the email server.

11 Click **Save** or click another tab to continue setting options.

Setting SoloBug options

1 Click the **Configure** tab.

2 Click **Database Options** then click the **SoloBug** tab.



3 Select a time interval from the **Look for new files every** menu.

You can override the selected interval at any time. Choose **File > Import > Perform Server Import**.

4 Select an **After importing** option.

5 Select **Email an acknowledgement to the submitter** to automatically acknowledge the email.

6 Select **Enter next sequence number in defect's reference field** to automatically enter the next defect sequence number.

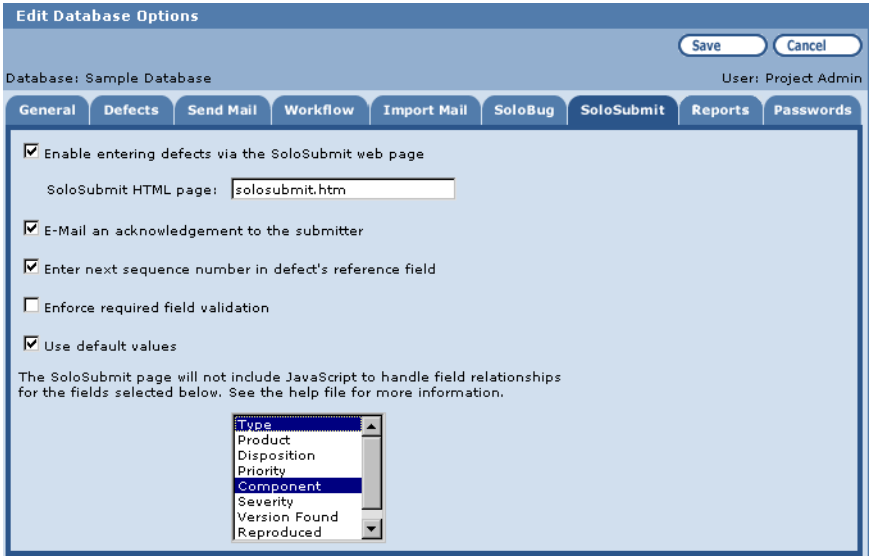
7 Click **Save** or click another tab to continue setting options.

Setting SoloSubmit options

The **TestTrack Pro SoloSubmit Admin Guide** includes detailed information about configuring and customizing SoloSubmit.

1 Click the **Configure** tab.

2 Click **Database Options** then click the **SoloSubmit** tab.



3 Select **Enable entering defects via the SoloSubmit web page** to enable SoloSubmit.

Remember, this option is database-specific. SoloSubmit must be enabled for each database.

4 The SoloSubmit HTML page field defaults to **solosubmit.htm**.

If you use a customized SoloSubmit HTML page, enter the file name. Make sure the HTML file is in the correct TestTrack Pro directory on your web server.

5 Select **Email an acknowledgement to the submitter** to automatically send an email acknowledging the submission.

This lets customers know their defect was received.

6 Select **Enter next sequence number in defect's reference field** to automatically enter the next defect sequence number.

7 Select **Enforce required field validation** to ensure that values are entered for all required fields.

The required field validation is **not** enforced for the **Entered By** field because users do not log into SoloSubmit. If **Entered By** is a required field, defects entered via SoloSubmit cannot pass the required field validation check.

8 Select **Use default values** to initially populate the SoloSubmit web page with default values.

SoloSubmit **cannot** determine which time zone to use as **default values** for **date/time custom fields**. When a defect is submitted via SoloSubmit, there is no associated user in the database. Consequently, there are no user options to check to determine which time zone to use. The current time of the computer the SoloSubmit CGI is running on, when the SoloSubmit page is loaded, is used as the default value for date/time custom fields. In addition, the date is assumed to be in the server's time zone. The date/time is converted to GMT.

9 Select fields you do not want JavaScript to handle field relationships for on the SoloSubmit web page.

You would choose **not** to include the JavaScript for one of the following reasons:

- The SoloSubmit web page includes hidden fields. For example, you commented out a field that you do not want the customer to see. You can delete the HTML, but the field, and its values, will still show up in the JavaScript. If the customer chooses View Source on the SoloSubmit web page, the field and its values will be shown. Choosing not to include the JavaScript resolves this issue.

- The SoloSubmit web page is customized and you do not want to overwrite the customization. For example, you only want a customer to be able to choose 3 out of 6 values for a field. You hard code a list of field values in the HTML. If you include the JavaScript, your customization is overwritten. By ignoring JavaScript for the field, the hard coded list values are used.

If neither reason applies, and you select a field from the list, it can result in unexpected behavior. For example, you ignore JavaScript for **Component**, which is a child of **Product**. When SoloSubmit is accessed, **Product** and **Component** are populated with the initial values. If the user chooses a different **Product**, the **Component** values are not changed.

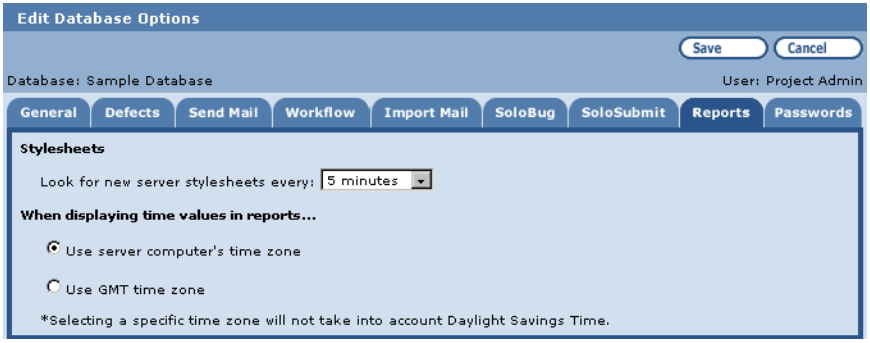
10 Click **Save** or click another tab to continue setting options.

Remember to give customers the SoloSubmit URL. To submit bug reports or feature requests, they simply open a browser and enter the SoloSubmit URL (e.g., http://WysiCorp.com/ttweb/loginSoloSubmit.htm).

Setting report options

1 Click the **Configure** tab.

2 Click **Database Options** then click the **Reports** tab.



3 Select a time interval from the **Look for new stylesheets every** menu.

The server periodically searches the database for new stylesheets and updates the stylesheet menus.

4 Select a **time zone** option.

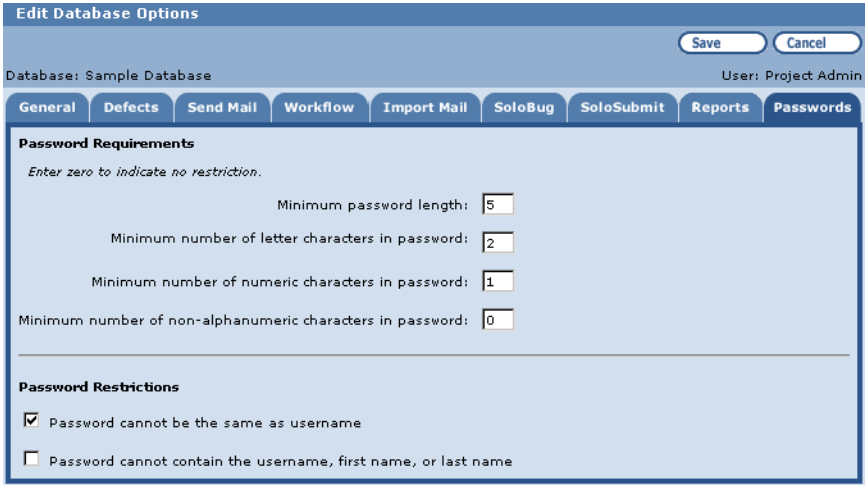
Detail reports display the creation and modified time at the bottom of the report. Configure the report to use the server's time zone or GMT.

5 Click **Save** or click another tab to continue setting options.

Setting password options

1 Click the **Configure** tab.

2 Click **Database Options** then click the **Passwords** tab.



3 Enter the **Password requirements**.

The sum of the minimum number of letter characters, numeric characters, and non-alphanumeric characters should be less than or equal to the minimum password length value.

4 Select the **Password restrictions**.

5 Click **Save** or click another tab to continue setting options.

Configuring auto-assignment rules

You can configure rules that automatically assign a user for the actions in a defect's lifecycle. Auto-assignment rules are checked when each of the eight main defect actions occur: Defect is created; Defect is fixed; Defect is released to testing; Defect fails verification; Defect passes verification, but needs customer verification; Defect is released to customer testing; Defect fails customer verification; and Defect is re-opened.

For example, you may want all new defects to automatically be assigned to the lead engineer for a project. The lead engineer can determine which developer needs to work on the problem and assign the defect to them.

Rule processing

When a defect action occurs (e.g. Defect is created, Defect is closed), TestTrack Pro checks for auto-assignment rules. The rules are checked in top-down order as they appear in the Configure Rules dialog box. If a defect passes a filter, the assignment action is applied. If the defect does not pass the filter, the next rule is checked until the defect passes a filter. If the defect does not pass any of the filters, the default action is applied.

For example, if your team is in Beta testing, you want to make sure that defects failing verification get immediate attention. If the **Defect fails verification**, two auto-assignment rules are checked.

- If the defect's filter is **Failed Fix**, the defect is automatically assigned to the last Fixed by User. The person responsible for fixing the defect can review why the fix failed and make the necessary adjustments so the defect can pass. If the filter is not **Failed Fix**, the second rule is checked.
- If the defect's filter is **On hold**, the defect is automatically assigned to the project administrator. The administrator can decide if the issue needs to be resolved in Beta or at a later time.

Rule exceptions

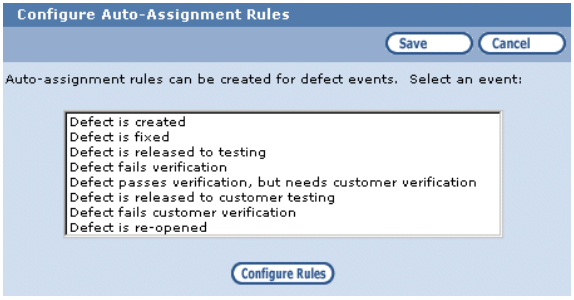
Auto-assignment processing is skipped when a defect is created using XML import, text import, or by duplicating a defect. The original state of the defect is maintained. For example, if you duplicate a defect that is unassigned, the new defect is also unassigned. If you duplicate a defect that is assigned to Barry, the new defect is also assigned to Barry.

Adding auto-assignment rules

1 Click the **Configure** tab.

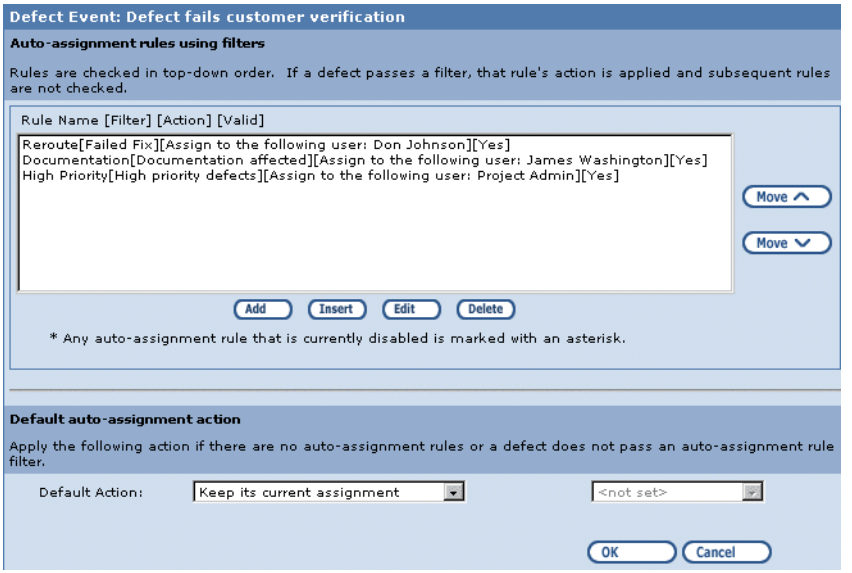
2 Click **Auto-Assignment Rules**.

The Configure Auto-Assignment Rules dialog opens.



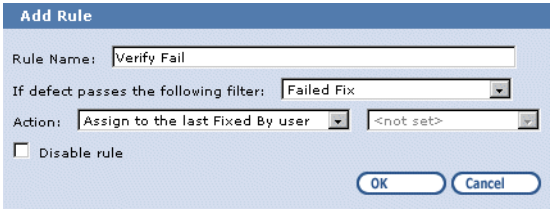
3 Select a defect event and click **Configure Rules**.

The Defect Event dialog opens.



4 Click **Add** to add an auto-assignment rule.

The Add Auto-Assignment Rule dialog opens.



5 Enter a **Rule Name**.

6 Select a filter from the **If defect passes the following filter** menu.

The filter menu only displays the filters you have access to.

7 Select an **Action** for the defect event.

The assignment actions change based on the defect action you are creating the rule for.

8 Select **Disable rule** to disable the rule you are creating.

If two or more rules use the same filter, only one rule is valid. To avoid conflicts, disables rules that use the same filter.

9 Click **OK**.

Setting default actions

You can set a default action for each defect action if you do not want to configure auto-assignment rules.

1 Click the **Configure** tab.

2 Click **Auto-Assignment Rules**.

The Configure Auto-Assignment Rules dialog opens.

3 Select a defect event and click **Configure Rules**.

4 Select the **Default action** and click **OK**.

You should set a default action for each defect event.

Inserting auto-assignment rules

1 Click the **Configure** tab.

2 Click **Auto-Assignment Rules**.

3 Select a defect event and click **Configure Rules**.

4 Select a rule and click **Insert.** The rule is inserted above the selected rule.

5 Enter a **Rule Name**.

6 Select a filter from the **If defect passes the following filter** menu.

7 Select an **Action** for the defect event.

8 Select **Disable rule** to temporarily disable the rule.

Select this option if you are inserting a rule that conflicts with another rule.

9 Click **OK**.

Editing auto-assignment rules

1 Click the **Configure** tab.

2 Click **Auto-Assignment Rules**.

3 Select a defect event and click **Configure Rules**.

4 Select a rule and click **Edit.**

You can change the rule's name, filter, or action.

5 Select **Disable Rule** to disable the selected rule.

This option lets you disable a rule instead of deleting it. Disabled rules are greyed-out in the rules list.

6 Click **OK**.

Deleting auto-assignment rules

1 Click the **Configure** tab.

2 Click **Auto-Assignment Rules**.

3 Select a defect event and click **Configure Rules**.

4 Select a rule and click **Delete**.

The rule is deleted.

Logging historical defect information

Historical defect logging is an optional feature is used to record the changes made to a specific defect. It lets users see what has changed in a particular defect record, who made the change, and when the change was made.

The TestTrack Pro administrator is generally responsible for historical defect logging functions. Depending on your security level, you may not have access to the historical defect logging commands.

Following are some of the actions that generate a historical defect log message:

- Adding or editing a defect
- Adding, editing, or deleting a found by record
- Adding, editing, or deleting a defect action
- Merging defects
- Renumbering a defect or assigning a defect number

Enabling historical defect logging

When historical defect logging is enabled, all changes made to a defect are logged and added to the historical defect information.

1 Click the **Configure** tab then click **Database Options**.

The Edit Database Options dialog opens.

2 Click the **Defects** tab.

3 Select **Enable logging of historical defect information**.

Historical defect information will now be logged. Disabling this option does not affect any information already logged in the database.

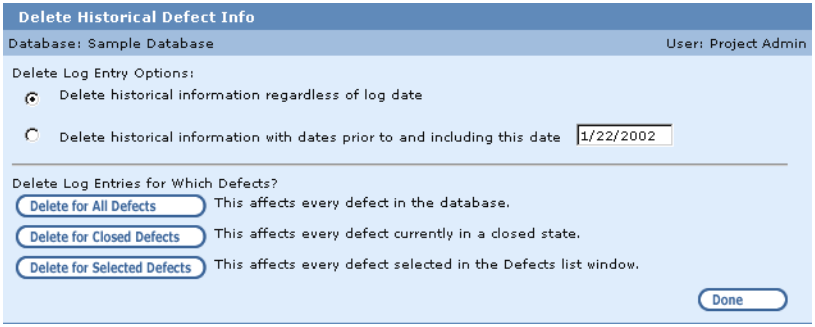
Deleting historical defect log information

If the database is becoming too large because of the historical log entries, you can delete the entries. Deleting historical defect log entries does not reduce the amount of disk space used until the database is compressed. For more information, see **Understanding database settings** in **The Server Admin Utility Guide**.

1 Click the **Defects** tab then click **Delete Historical**.

To delete historical log entries for specific defects, select the defects on the Defects list window before proceeding.

The Delete Historical Defect Info dialog opens.



2 Select the Delete Log Entry options.

- **Delete historical information regardless of log date** deletes all log entries.
- **Delete historical information with dates prior to and including this date:** deletes log entries prior to and including the date you enter.

3 Click a **Delete Log Entries For Which Defects?** button.

You are prompted to confirm the deletion.

4 Click **Delete**.

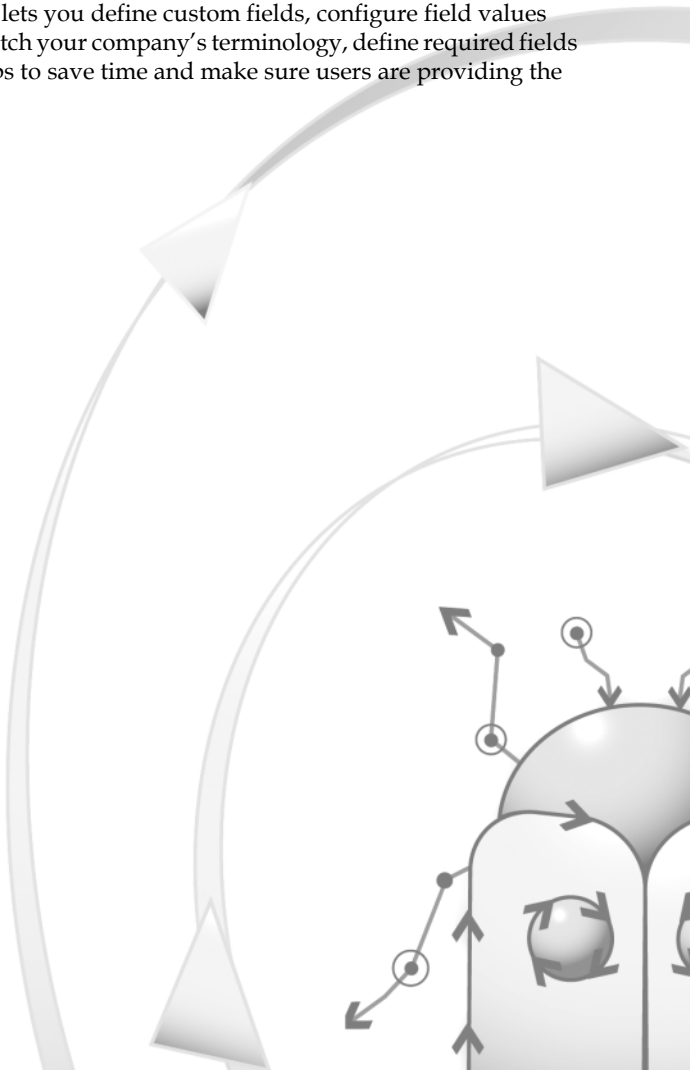
The defect historical log information entries are deleted.

Chapter 10
Customizing Fields

Customize fields...

and collect the data you need. TestTrack Pro lets you define custom fields, configure field values (names) and rename default field labels to match your company's terminology, define required fields and default values, and use field relationships to save time and make sure users are providing the information you need.

This section includes:



Configuring list values

You may not have access to these admin commands.

You add custom list values to dropdown menus. The values you configure affect only the database you are logged into. Default values are provided for some fields.

Type Names: What type of defect was found? Default values: Crash - Data Loss, Crash - No Data Loss, Incorrect Functionality, Cosmetic, Feature Request.

Priority Names: When should the defect be fixed? Default values: Immediate, Before Alpha, Before Beta, Before Final, Future Release.

Severity Names: How severe is the defect? Default values: Causes Crash, No Workaround, Workaround, Cosmetic.

Product Names: What products are tracked in the database?

Component Names: Which component (if any) is the defect found in?

Disposition Names: What is the defect disposition? Default values: Open - Not Reviewed, Open - Reviewed, Need Customer Input, Fix in Future Release, Hold.

Reproduced Names: Can the problem be reproduced? Default values: Always, Sometimes, Rarely, Could Not, I Didn't Try.

Fixed Resolutions: What is the fix resolution? Default values: Code Change, Documentation Change, Clarification, Not Our Bug, Not a Bug, On Hold.

Closed Resolutions: What is the close resolution? Default values: Code Change, Documentation Change, Clarification, Not Our Bug, Not a Bug, On Hold.

Version Names: Which software version is affected?

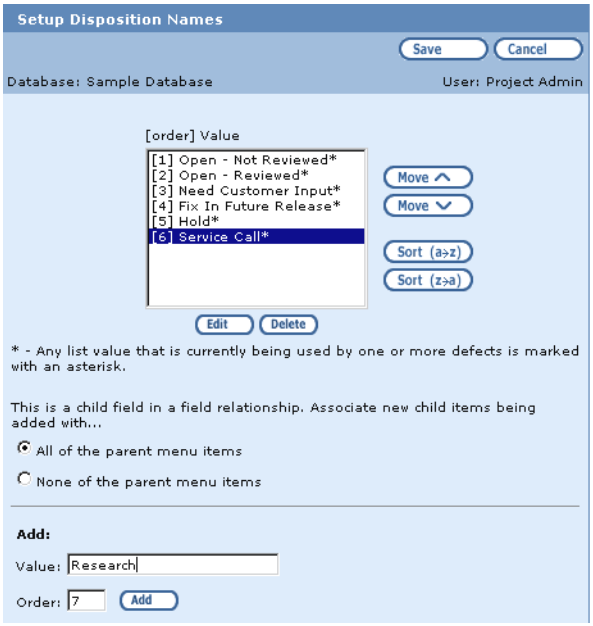
Adding list values

The following example uses Disposition Names. You follow the same steps for all list values.

1 Click the **Configure** tab.

2 Click the corresponding **Edit List Values** link.

The Setup dialog opens.



The setup dialog changes based on the type of field being configured. For example, if you add a value to a parent field, you are reminded to configure field relationships for the new value. Likewise, if you add a child field, you can choose to associate the new field value with all or none of the parent values.

3 Enter the new value name in the **Add** area.

The value is added to the end of the list and the order increments by one. Enter a different number to change the order.

4 Select the association for the field.

You can associate the new child field with all of the parent menu items or none of the parent menu items.

You can also manually configure the parent-child field relationship. Go to the **Configure** tab and click **Field Relationships.** For more information, see **Configuring custom fields,** page 111.

5 Click **Add** to add the new field value.

6 Click **Save** when you finish adding field values.

Editing list values

1 Click the **Configure** tab. Click the corresponding **Edit List Values** link.

The Setup dialog opens.

2 Select the value and click **Edit**.

3 Make any changes in the **Add** area.

You can edit the value name and the value order.

4 Click **OK**.

Deleting list values

You are not prompted to confirm the deletion. If you make a mistake, click **Cancel** on the Configure page. The changes you made are not saved.

1 Click the **Configure** tab. Click the corresponding **Edit List Values** link.

2 Select the value and click **Delete**.

If your database uses field relationships and you delete a list value, you may cause a child field's value to no longer follow field relationship rules.

Configuring custom fields

You can add up to ten custom fields to a database. All custom fields can be displayed on the Custom Fields tab or up to two custom fields can be displayed in the main area of the Add Defect, Edit Defect, and View Defect dialog.

You may not have access to these admin commands.

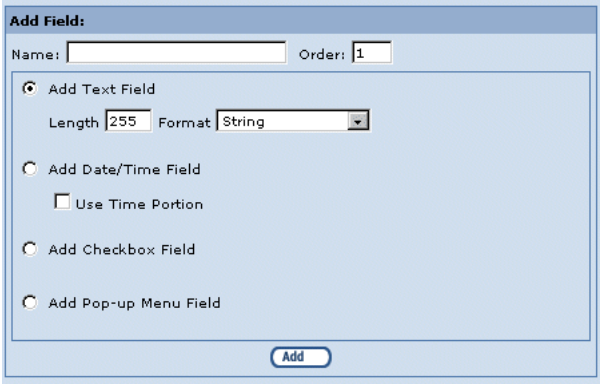
Adding custom fields

1 Click the **Configure** tab.

2 Click **Custom Fields**.

The Setup Custom Fields dialog opens.

3 Enter the field name in the **Add** area.



4 The **Order** field automatically increments by one.

Enter a different number to change the field order.

5 Select **Add Text Field** to let users enter a value. Enter the field **Length** and select string, integer, or decimal number from the **Format** menu. Click **Add** to add the custom field.

6 Select **Add Date/Time Field** to create a date/time field. When users select this type of custom field, the current date and time is set. Users can change the date and time. Click **Add** to add the custom field.

7 Select **Add Check box** field to create a check box field. The check box custom fields works the same as other check boxes, users select or clear the check box. Click **Add** to add the custom field.

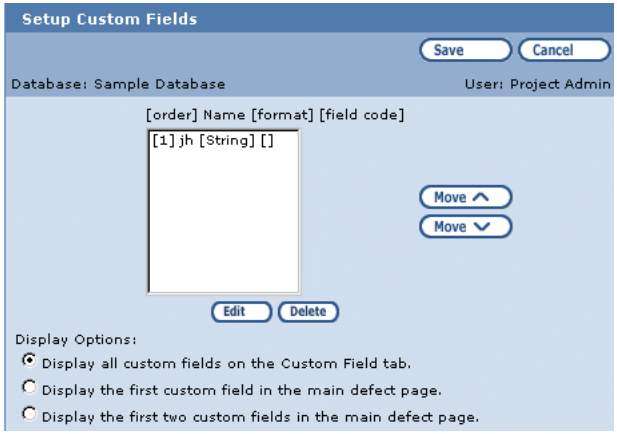
8 Select **Add Pop-up Menu Field** if you want users to choose a predefined value.

Click **Add Popup**. The Setup Custom Pop-up Menu dialog opens. To add values to the popup menu, in the Add area, enter a value and select the order. Click **Add** to add the custom pop-up menu items. Continue this process until all values are added to the custom popup menu.

If you add a field that will be used in a field relationship, make sure you choose **Pop-Up Menu.** You need to restrict the information users can enter.

9 Select the **Display Options**.

You can display all the custom fields on the Custom Field tab or display up to two custom fields in the main area of the Add, Edit, and View Defect dialogs.



10 Click **Save**.

Editing custom fields

1 Click the **Configure** tab then click **Custom Fields**.

The Configure Custom Fields dialog opens.

2 Select the custom field and click **Edit**.

3 Make any changes and click **OK**.

Deleting custom fields

You are not prompted to confirm the deletion. If you make a mistake, click **Cancel**. The changes you made are not saved.

1 Click the **Configure** tab then click **Custom Fields**.

The Configure Custom Fields dialog opens.

2 Select the custom field and click **Delete**.

Defining default values

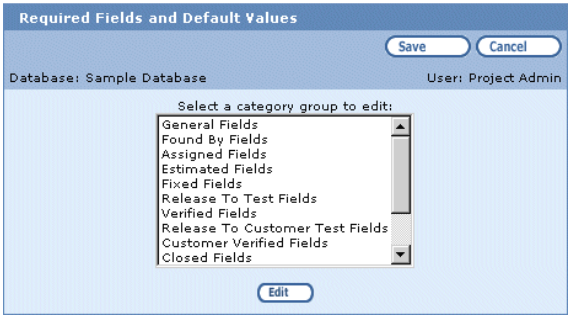
You may not have access to these admin commands.

You can define **default field values** for most add defect or defect action fields. The default values and required fields you set are database specific.

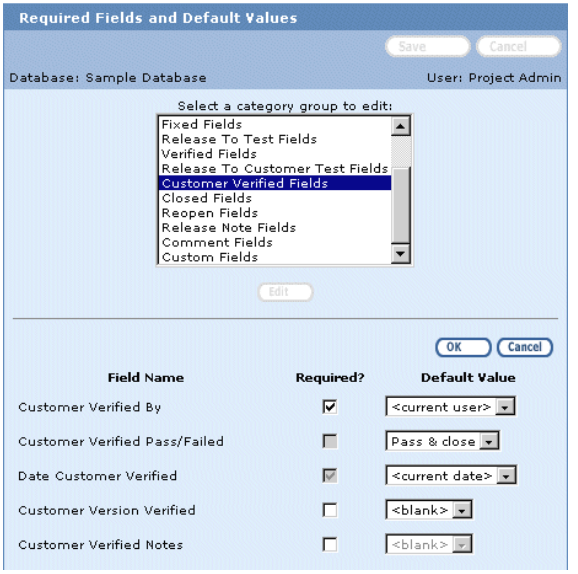
1 Click the **Configure** tab.

2 Click **Required Fields/Default Values**.

The Required Fields and Default Values dialog opens.



3 Select the group from the menu and click **Edit.**



4 To set a default value, select a value from the corresponding **Default Value** menu.

How do default values affect field relationships?

A child field's default value may be invalid, depending on the parent field's default value. If a default value is selected, and it does not follow the defined field relationships, the default value can still be used but the child field's value will no longer follow field relationship rules.

How do hidden fields affect field relationships?

A child field that is hidden can cause unintended changes. If you change a parent field, you may cause a child field's value to no longer follow field relationship rules. Additionally, if the child field is required, any changes that are made cannot be saved.

5 Click **OK** to save your selections.

Defining required fields

You may not have access to these admin commands.

TestTrack Pro lets you select any defect or defect action input field, including custom fields, and make it a **required field**. When a field is required, it means a user **must** enter data in that field before TestTrack Pro will add the defect or defect action to the database or save any edit changes.

Required fields are set for all users. Field level security is set for User Groups. For example: A database is set up and the Priority field is required but does not have a default value. A Customer User Group is created and the Priority Field is hidden for both Add and Edit privileges. The Customer User Group can add defects. A customer who belongs to the Customer User Group cannot add a defect. This is because the Priority field is required but the customer cannot set this field. To work around this problem, grant access to the Priority field when adding defects and hide the Priority field when editing defects.

The required field must be populated for all instances of actions. For example: the Found By field is required and does not have a default value. When multiple detail records are created for a single defect, the Found By field must be populated for all of the detail records.

1 Click the **Configure** tab.

2 Click **Required Fields/Default Values**.

The Required Fields and Default Values dialog opens.

3 Select the group from the menu and click **Edit.**

4 To set a required field, select the corresponding **Required?** check box. A field that is set using check boxes and/or radio buttons cannot be set as a required field.

If a field is **always required,** the check box is selected and inactive. If a field **cannot be set** as a **required field,** the check box is not selected and it is inactive.

5 Click **OK** to save your selections.

Configuring field relationships

You may not have access to these admin commands.

You can define parent-child field relationships that let you create dependent items in the database. This give you a way to configure the pop-up menus so users can only select values based on the parent-child field relationship. Before you begin configuring field relationships, you should think about how to best utilize this powerful feature.

Configuring field relationships lets you limit menu choices. This helps users input better data and make more logical choices. This also cuts down on having data that does not make sense in the database. When a field is chosen from a list, TestTrack Pro determines if the field has any child relationships. If there is a parent-child relationship, the child field is populated with the values based on the parent's field value.

- The following fields can be set as **parent fields**: type, product, disposition, priority, component, severity, custom fields.
- The following fields can be set as **child fields**: type, product, disposition, priority, component, severity, version found, reproduced, computer config, custom fields.
- The following fields cannot be set as parent or child fields: entered by, found by, fixed by.

A **parent field** can have **one or more** child field relationships. A **child field** can only have **one** parent. A child field can also be the parent of another field.

If a field is chosen as a child field, it is excluded from the child field list. For example, Priority is the child field of Severity. When you set up a new field relationship, you cannot select Priority as the child field.

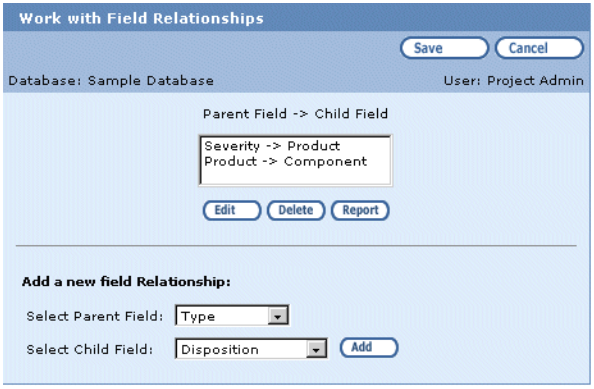
To prevent a circular reference, fields that are a parent or grandparent of the selected parent field are also excluded. For example, Product is the parent field of Component. Component is the parent field of Version. You cannot set Version as the parent field of Product because this creates a circular reference.

Adding field relationships

1 Click the **Configure** tab.

2 Click **Field Relationships**.

The Work with Field Relationships dialog opens.



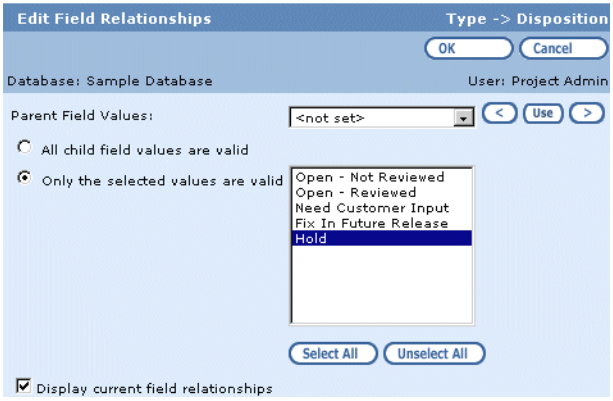
3 Select a **Parent Field** from the menu in the Add a Field Relationship area.

4 Select a **Child Field** from the menu in the Add a Field Relationship area.

5 Click **Add**.

The Edit Field Relationships dialog opens.

The field relationship you are setting up is listed in the top-right of the dialog.



6 Select child field values for each parent field value.

To select specific values select **Only the selected values are valid** then **Ctrl+click** each field.

If your browser does not support JavaScript, click **Use** to refresh the screen.

7 Select the next parent field value from the list or click an arrow to move to the next value.

Repeat **steps 5 - 7** child field values are set for all parent fields.

8 Click **OK**.

You return to the Work with Field Relationships page.

What if a database uses default values?
The child field's default value may be invalid, depending on the parent field's default value. If a default value is selected, and it does not follow the defined field relationships, the default value can still be used.

What if a database uses hidden fields?
Hidden fields can cause unintended changes. If a parent field is changed, causing the child field value to be, the child field may be changed to **<not set>**, depending on database options. Additionally, if the child field is required, any changes that are made cannot be saved.

Editing field relationships

1 Click the **Configure** tab.

2 Click **Field Relationships**.

3 Select the field relationship you want to change and click **Edit**.

The Edit Field Relationships dialog opens.

4 Make any changes and click **OK**.

Deleting field relationships

You are not prompted to confirm the deletion. If you make a mistake, click **Cancel**. The changes you made are not saved.

1 Click the **Configure** tab.

2 Click **Field Relationships**.

3 Select the field relationship and click **Delete**.

Renaming field labels

You can rename defect field labels to match your company's terminology. This can help you customize your tracking system and decrease user confusion. Renaming a field does not change the functionality or format of the field. It only changes the label displayed in TestTrack Pro.

For example, your company might use case numbers. By renaming reference to case number, your users will know exactly where to enter the information. Maybe your company refers to issue instead of defects? You can rename all instances of defect (Defect, defects, defect(s), etc.) to issue. If you are a service-oriented organization, and use the Custom Fields tab to track service issues, rename the tab to Service!

- The following field labels can be renamed: Summary, Type, Disposition, Priority, Product, Component, Reference, Severity, Entered By, Date Entered, Status, Found By, Date Found, Date, Version Found, Version, Description, Reproduced, Steps to Reproduce, Computer Config, and Other Hardware and Software. The Custom Fields tab label can also be renamed.
- The following words can also be renamed: Defect / defect, Defects / defects, Defect(s) / defect(s).
- The following field labels **cannot** be renamed: Attachments, Workaround, Notify tab, History tab, and SCC fields.

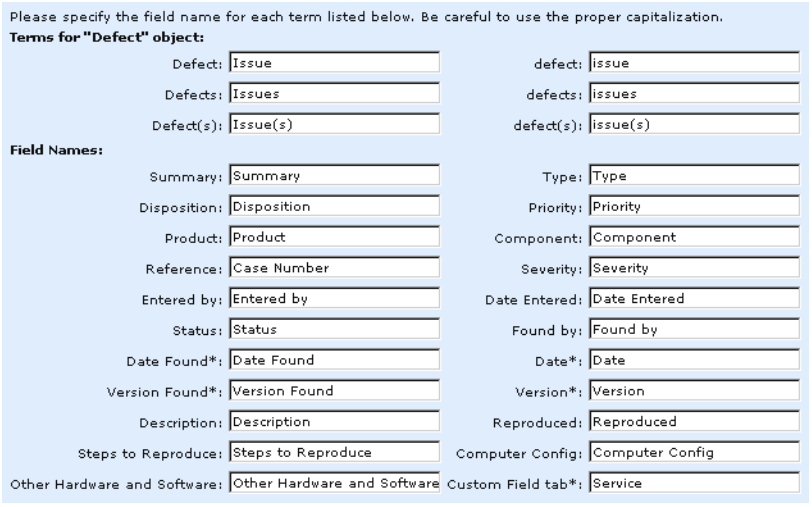
Date is the short form of Date Found and Version is the short form of Version Found. If you rename these field labels, use the same terminology. The short and long field names are both used. The short name is used to allow fields to fit in the user interface. For example, the Version field is on the Detail tab of the Add Defect window. This field corresponds to Version Found but Version fits in the user interface.

1 Click the **Configure** tab.

2 Click **Rename Field Labels**.

The Rename Field Labels dialog opens.

3 Enter new field names for the labels you want to rename.



Field labels cannot be resized in TestTrack Pro Client and must be 32 characters or shorter. Field labels that do not fit are truncated.

4 When you finish, click **OK**.

Your changes are saved and the database is updated with the new field labels. When you rename fields labels, it is possible that changes will only be visible in the Windows client. To ensure customized field labels are used by both the Windows and Web clients, do one of the following:

- TestTrack Pro can automatically update the corresponding Web graphics with the new field names. To enable this option, click the **Configure** tab, then click **Database Options**. Select **Replace graphics if Field Names are customized** on the **General** tab selected. Do not select this option if you use custom graphics for renamed fields.
- You can provide custom graphics. Image files are located in the following directory: **Inetpub/wwwroot/ttweb/images**. Most graphics include two images, one for a selected tab and one for a non-selected tab.

Restoring original labels

You can restore the field labels to their original values at any time.

1 Click the **Configure** tab.

2 Click **Rename Field Labels**.

3 Click **Restore to Original Values**.

The field labels revert to the original values.

4 Click **OK** to save the changes. If you do not want to save the changes, click Cancel.

Field label exceptions

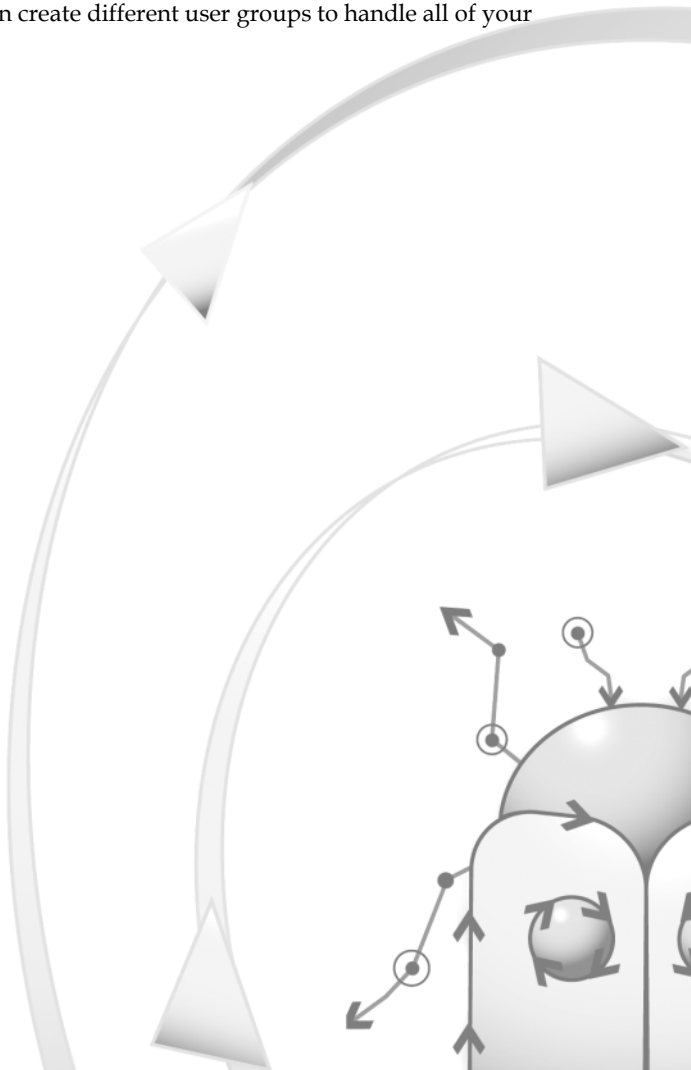
- Changes you make to field labels do not show up in SoloBug. Because it is a stand-alone product, SoloBug is not necessarily associated with one database. Field names can be changed when you customize the SoloBug executable.
- Field codes do not change. For example, Disposition (%DISP) is renamed to Substatus. To include the Substatus data in an email template, use %DISP%. For more information, see **Label field codes,** page 168.
- Database columns are not renamed. When you use the ODBC driver, you need to use the original field name in your queries.

Chapter 11
Managing User Groups

Safe and Secure!

User groups are your key to security. You can create different user groups to handle all of your company's security needs.

This section includes:



About user groups

A user group is a collection of users who share responsibilities and perform similar tasks. In order to access a database, each user must be assigned to a user group.

When you set up a database, create the user groups **first**. This lets you create a **security structure** for the users. You may find it helpful to create a table that lists the type of users accessing the database and what their needs are. You can add as many or as few user groups as you need, and make their security levels as general or as specific as you need.

You can create the following structure and name the user groups according to security level:

User Group Name	Description	Commands Granted
Level 1	Low clearance	View
Level 2	Medium clearance	View, Add
Level 3	High clearance	View, Add, Edit
Level 4	Highest clearance	View, Add, Edit, Delete

Or you can use the same structure and name the user groups according to job description:

User Group Name	Description	Commands Granted
Tech Writer	Low clearance	View
Engineer	Medium clearance	View, Add
QA Tester	High clearance	View, Add, Edit
Manager	Highest clearance	View, Add, Edit, Delete

If you want **all** users to have access to **all** commands, you do not have to create user groups! TestTrack Pro adds an Administration user group when a database is created. This user group has access to every command. Simply add the users to this default user group.

User groups and security

TestTrack Pro security is assigned at the user group level. Each user group can be assigned different levels of security. You can create an unlimited number of security groups and levels. Security determines what databases users can access, what their view and edit rights are for authorized projects (on a per-field level), and what they can do at each stage of the workflow process. For example, deleting defects, or attaching files are all privileges that can be assigned to a user group.

Command security

Command security restricts access to a command and is set by category. For example, Can a user fix a defect?

Command security includes the following categories: General, Administration, Defects, Customers, Users, User Groups, Test Configurations, Filters, Reports, and Workbook.

For example, you create a SOAP user group for developers using the TestTrack SOAP SDK. To give the user group access to the SOAP SDK, enable **Allow log-in via SOAP** in the General category.

Defect security

Defect security restricts the defects visible to the user group based on an existing filter and/or whether the user reported the defect. Defects that do not pass the filter are not displayed in the defect list or included in reports.

For example, you have a group of managers who only need information about feature requests. Select the **Open Feature Requests** filter for this group. The managers can only view defects that meet the filter criteria.

Field security

Affects defects and defect actions and restricts a user's ability to enter, or edit, field data. For example, Can a user enter a resolution in the fix defect action?

Three types of field security can be assigned: **Read/Write**, **Read Only**, and **Hidden**. In addition, **Add** and **Edit** privileges are set separately. For example, assign a restricted user group read/write add privileges for the Type field. Assign the same user group read only edit privileges for the Type field. When adding a new defect, users can enter information for the type field. When editing a defect, users can view the Type field but will not be able to make any changes.

Security can be assigned to the following fields: General, Found By, Assigned, Estimated, Fixed, Release to Test, Verified, Release to Customer Test, Customer Verified, Closed, Reopen, Release Notes, Comment, and Custom fields.

Field security **cannot** be applied to the following areas: email templates, SoloSubmit, SoloBug, and import/export.

System-generated fields **cannot** be assigned field security. This includes the following fields: defect number, defect status, has attachments?, has workaround?, date created, created by, creation method, date last modified, last modified by, found by group, found by company, how many?, and has release notes?

This example shows how to use Add privileges to set up field security:

Assign the Department Manager group Read/Write access to the Priority field. Users in the Department Manager group can set the priority level.

Assign the Programmer group Read Only access to the Priority field. Users in the Programmer group can view, and not edit, the priority level.

Assign the Customer group Hidden access to the Priority field. Users in the Customer group cannot view the priority level assigned to defects.

Adding user groups

You may not have access to these admin commands.

1 Click the **User Groups** tab.

The Work with User Groups page opens.

2 Click **Add**.

The Add User Group dialog opens.

3 Enter a **Name** and **Description**.

This information is required.

4 Click the **Users** tab to add users to the group.

5 Select **Include users in pop-up menus** to list users in pop-up menus.

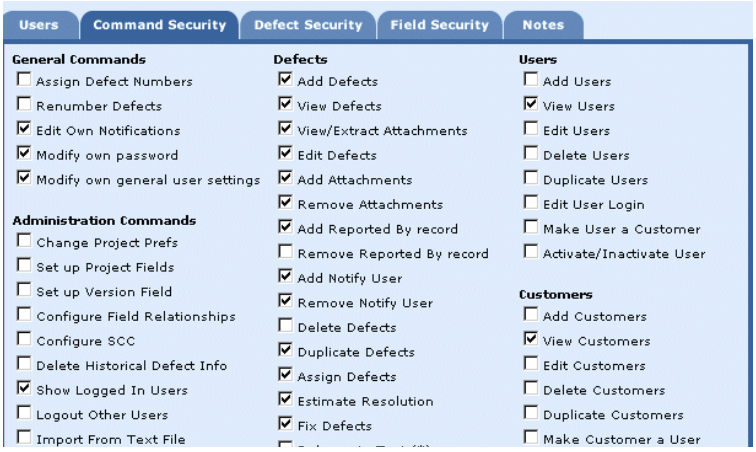
Clear the check box if the user group is intended for users who only report defects and do not need to be assigned any defect actions.

6 Select **Include customers in pop-up menus** to list the customers in pop-up menus.

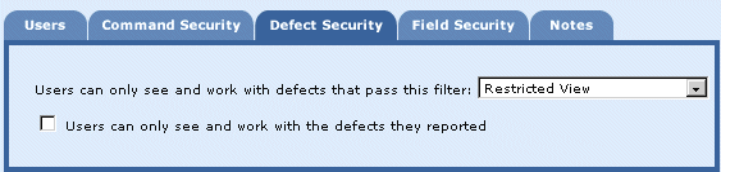
Clear the check box if the user group is intended for customers who only report defects and do not need to be assigned any defect actions.

7 Click the **Command Security** tab and set the security for each category.

Select a check box to enable access to a command. Clear the check box to restrict access.

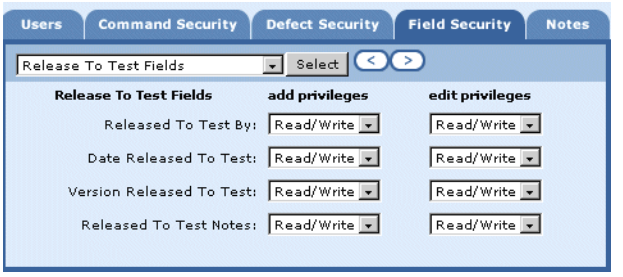


8 Click the **Defect Security** tab and set the defect security for this group.



9 Click the **Field Security** tab and set field security for this group.

- Use the page arrows to move through the field categories or select a field category from the list and click **Select**.
- Be sure to set **Add** and **Edit** privileges for each field.



A field can be represented by an edit box, check box, radio button, or a list box. Remember, setting field security affects **all** field types.

10 Click the **Notes** tab and enter any information about the user group.

11 Click **Save**.

The user group is added to the database.

Viewing user groups

1 Click the **User Groups** tab.

2 Select the user group and click **View**.

The View User Group dialog opens. All fields are read-only.

Editing user groups

1 Click the **User Groups** tab.

2 Select the user group and click **Edit**.

3 Make any changes and click **Save**.

Your changes are saved and you return to the Work with User Groups page.

Duplicating user groups

If you are adding users groups with similar functions, you can save time by duplicating and modifying a user group.

1 Click the **User Groups** tab.

2 Select the user group and click **Duplicate**.

The user group is duplicated.

3 Modify the user group and save your changes.

Deleting user groups

1 Click the **User Groups** tab.

2 Select the user group and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

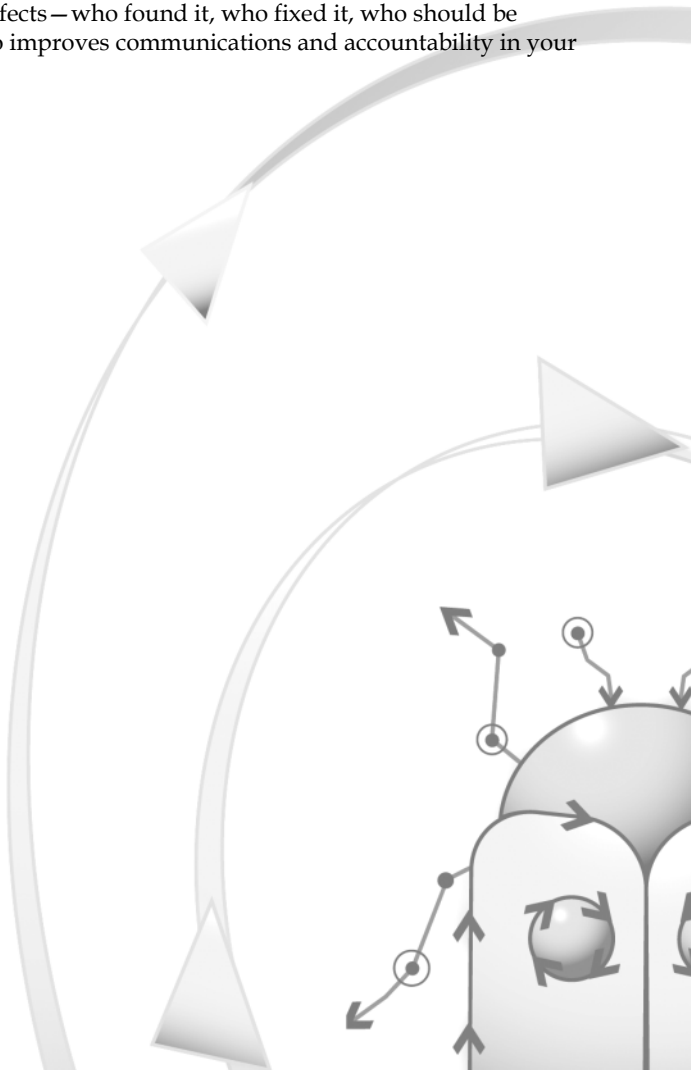
The user group is deleted.

Chapter 12
Managing Users

Defect, defect, who has the defect?

Users, the people who find, fix and verify defects—who found it, who fixed it, who should be verifying it? By tracking users, TestTrack Pro improves communications and accountability in your QA process.

This section includes:



About users

A user is anyone who can access TestTrack Pro and is involved in the testing process. TestTrack Pro users can only access those commands granted to the **user group** they are a member of. The TestTrack Pro administrator, or other users with a high level of security, are generally responsible for adding users to a database.

What is the difference between users and customers?

Every company uses TestTrack Pro differently, including setting up users and customers. One company might consider users to be internal employees who use TestTrack Pro and set up each department of the company as a customer. Another company might set up all internal employees as users and set up all external companies as customers.

Information for users and customers is tracked using the Info, CPU, Peripherals, Notes, and Statistics tabs. Customer information includes two additional tabs. The address tab is used to maintain address information for the company. The history tab gives an overview of the defects a customer has reported. If a customer calls and wants more information, you can quickly let the customer know the status of a defect (e.g., Open, assigned to Jane Tester).

Adding users

You may not have access to these admin commands.

1 Click the **Users** tab.

The Work with Users page opens.

2 Click **Add**.

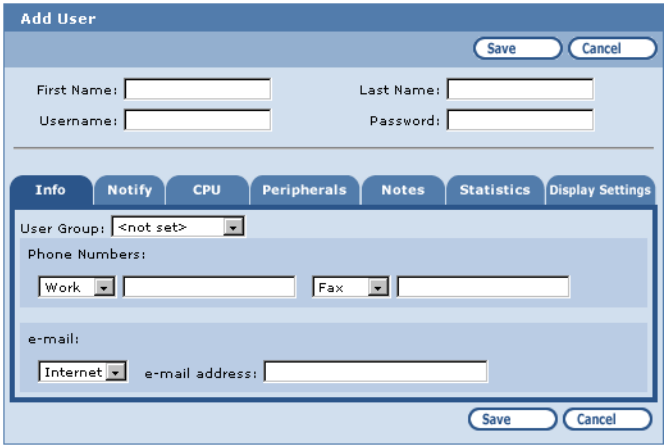
The Add User dialog opens.

3 Enter the user information.

You must enter a **First Name**, **Last Name**, and **Username**.

4 Enter the information on the **Info** tab.

You **must** select a user group. All other information is optional.



Make sure you accurately enter the user's email address. Email notifications are sent to this address.

5 Click the **Notify** tab and select notification preferences for the user.

Users can also set notification options by clicking **User Options** when they are logged in to a database.

6 Click the **CPU** tab and enter the CPU information.

These fields are optional but you should enter as much information as possible

7 Click the **Peripherals** tab and enter the peripherals information.

These fields are optional but you should enter as much information as possible

8 Click the **Notes** tab and enter any notes you want to track.

9 Skip the **Statistics** tab.

This read-only tab contains user statistical information.

10 Click the **Display Settings** tab.

The Display Settings tab is used to specify a filter for the Defects list window and select which columns to display on each of the eight list windows. Users cannot change the settings you select.

TestTrack Pro performance can be negatively affected when databases contain a large number of records. It can take an excessively long time for TestTrack Pro to populate the Defects list window. You can also control the amount of data being displayed by limiting the columns on some, or all, of the list windows.

- To filter the Defects list window, select a filter from the **Filter** menu.
- To limit which columns display, select the columns you want to include from the **Columns Displayed for Defects** menu.

If your browser does not support JavaScript, click **Use** to refresh the screen.

11 When you finish entering the user information, click **Save**.

The user is added to the database.

Viewing users

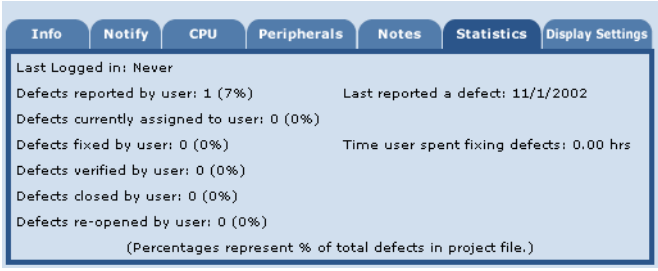
1 Click the **Users** tab.

2 Select the user and click **View**.

The View User dialog opens.

3 Click the **Statistics** tab.

This tab includes user stats that are gathered and calculated for you.



4 Click **Done** when you are finished.

Editing users

1 Click the **Users** tab.

2 Select the user and click **Edit**.

The Edit User dialog opens.

3 Make any changes and click **Save**.

Your changes are saved.

Duplicating users

If you are adding users with the same basic information, you can save time by duplicating and modifying a user.

1 Click the **Users** tab.

2 Select the user and click **Duplicate**.

The user is duplicated.

3 Modify the user information and save your changes.

Activating users

1 Click the **Users** tab.

2 Select the user and click **Activate**.

The user is activated.

Making a customer a user

Use this command if you made a mistake and entered a user as a customer.

1 Click the **Customers** tab.

The Work with Customers page opens.

2 Select the customer and click **Make User**.

The customer is converted to a user and added to the Users list. Give the user a username and password and add the user to a user group.

Inactivating users

Inactivate users to save the historic information.

1 Click the **Users** tab.

2 Select the user and click **Inactivate**.

You are prompted to confirm the inactivation.

3 Click **OK**.

The user is inactivated.

Deleting users

Deleting a user can result in loss of historic information, such as reported by and defect action information.

1 Click the **Users** tab.

2 Select the user and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

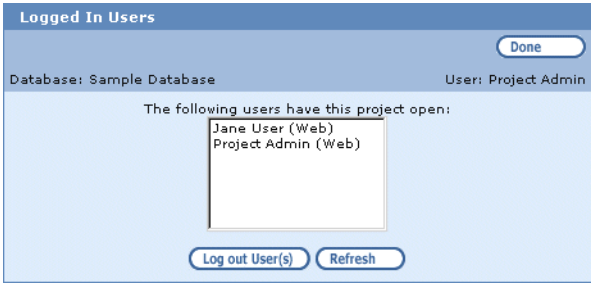
The user is deleted.

Viewing logged in users

To view the users who are currently logged in to the database you are using:

1 Click the **Configure** tab then click **Logged In Users**.

The Logged In Users dialog opens.



Logging out users

Users require licenses to run TestTrack Pro. If a user does not exit TestTrack Pro correctly, the license is not released. When this happens, you can free the license by logging out the user.

You can also log out users if you need to perform maintenance or make changes that require all users to be logged out.

1 Click the **Configure** tab then click **Logged In Users**.

The Logged In Users dialog opens.

2 Select the user(s) you want to log out and click **Log out User(s)**.

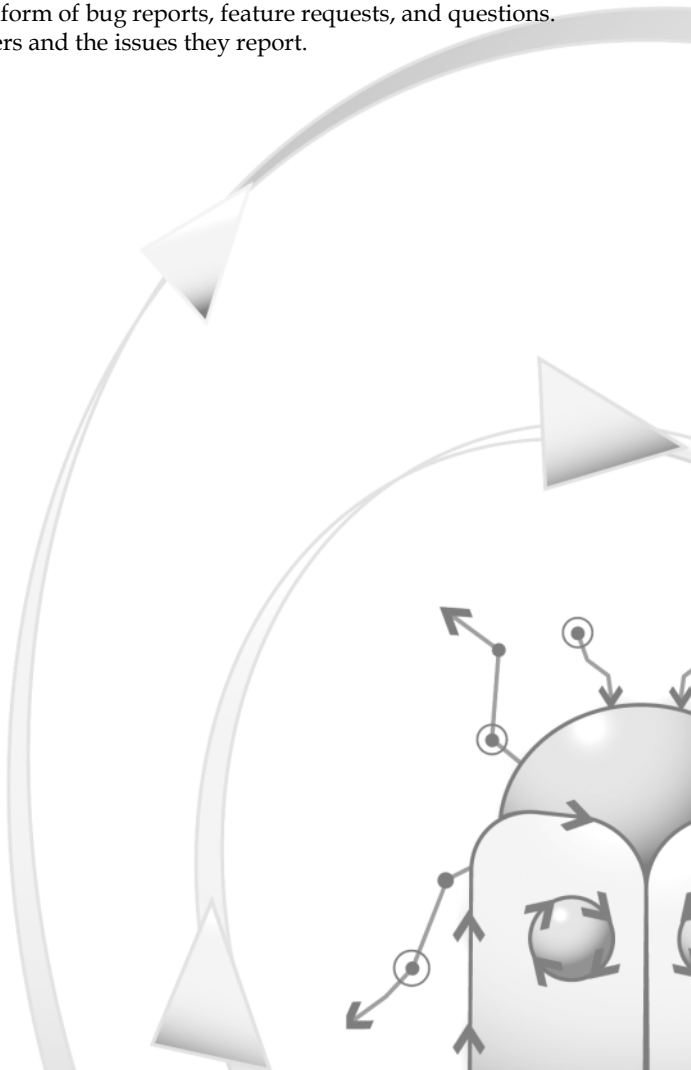
The user(s) is logged out.

Chapter 13
Managing Customers

Customers—your most valuable asset!

Customers provide valuable feedback in the form of bug reports, feature requests, and questions. TestTrack Pro makes it easy to track customers and the issues they report.

This section includes:



About customers

Customers can report bugs, feature requests or other issues that you track in your database. Customers are typically the end users of your products or services. Unlike users, customers usually do not have access to the database.

What is the difference between users and customers?

Each company uses TestTrack Pro differently, including setting up users and customers. One company might consider users to be internal employees who use TestTrack Pro and set up each department of the company as a customer. Another company might set up all internal employees as users and set up all external companies as customers.

Information for users and customers is tracked using the Info, CPU, Peripherals, Notes, and Statistics tabs. Customer information includes two additional tabs. The address tab is used to maintain address information for the company. The history tab gives an overview of the defects a customer has reported. If a customer calls and wants more information, you can quickly let the customer know the status of a defect (e.g., Open, assigned to Jane Tester).

The TestTrack Pro administrator, or other users with a high level of security, are generally responsible for adding customers to a database. Customers are added to the database in one of the following ways:

- You can **add the customer** to the database.
- If you have customers entered as users, you can **make a user a customer**.
- If you **import a SoloBug file** from a customer, and the customer is not in the database, TestTrack Pro automatically adds the customer.

Adding customers

You may not have access to these admin commands.

1 Click the **Customers** tab.

The Work with Customers page opens.

2 Click **Add**.

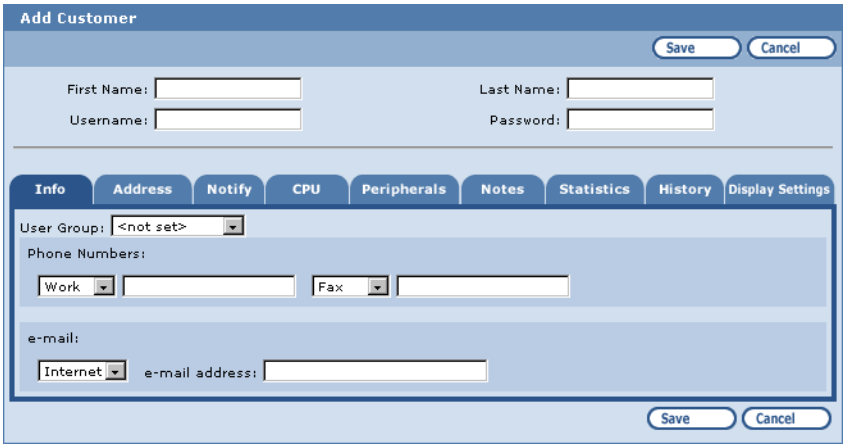
The Add Customer dialog opens.

3 Enter the customer information.

You must enter a **First Name** and **Last Name**. To enable database access for this customer, enter a **Username** and **Password**.

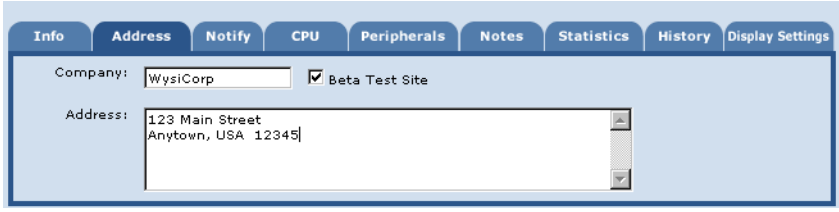
4 Enter the information on the **Info** tab.

You must select a user group if you enabled database access for this customer. All other information is optional.

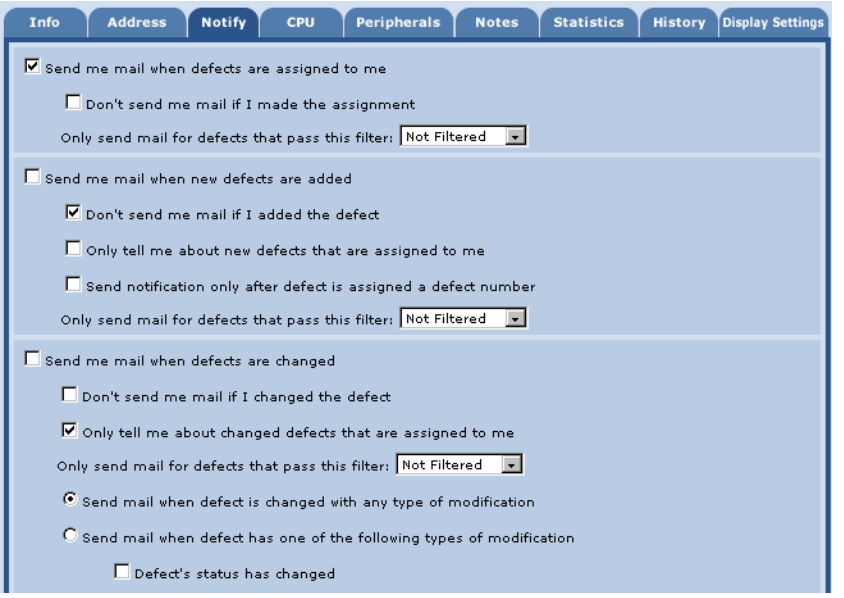


5 Click the **Address** tab and enter the address information.

Enter the company name and address. Select **Beta Test Site** if the customer is going to be a beta site.

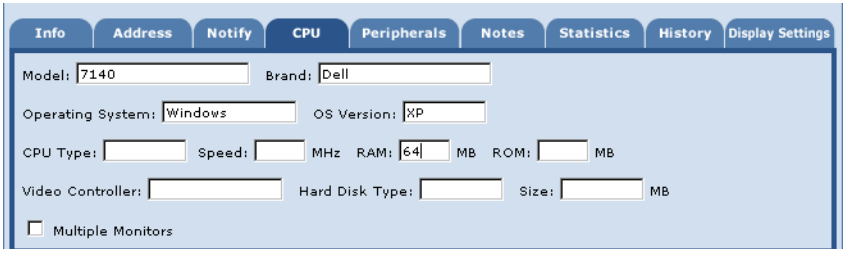


6 Click the **Notify** tab and select notification options for the customer.



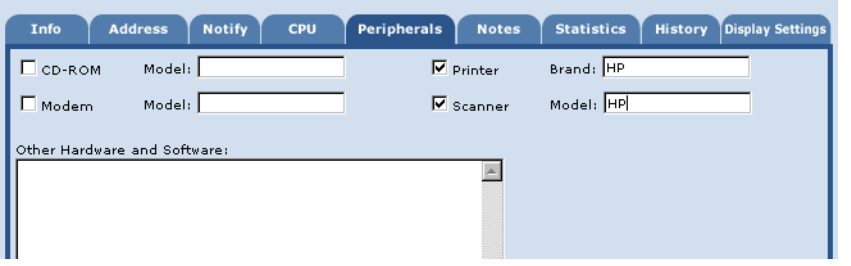
7 Click the **CPU** tab and enter the CPU information.

These fields are optional but you should enter as much information as possible.



8 Click the **Peripherals** tab and enter the peripherals information.

These fields are optional but you should enter as much information as possible.



9 Click the **Notes** tab and enter any notes.

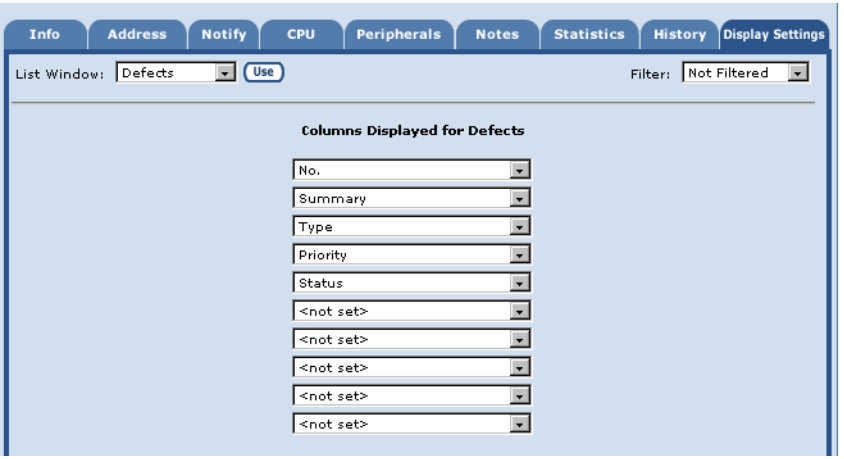
10 Skip the **Statistics** tab.

This read-only tab contains customer statistical information.

11 Skip the **History** tab.

This read-only tab contains information about defects the customer reported.

12 Click the **Display Settings** tab.



The Display Settings tab is used to specify a filter for the Defects list window and select which columns to display on each of the eight list windows. Customers cannot change the settings you select.

TestTrack Pro performance can be negatively affected when databases contain a large number of records. It can take an excessively long time for TestTrack Pro to populate the Defects list window. You can also control the amount of data being displayed by limiting the columns on some, or all, of the list windows.

- To filter the Defects list window, select a filter from the **Filter** menu.
- To limit which columns display, select the columns you want to include from the **Columns Displayed for Defects** menu.

If your browser does not support JavaScript, click **Use** to refresh the screen.

13 When you finish entering the customer information, click **Save**.

The customer is added to the database.

Viewing customers

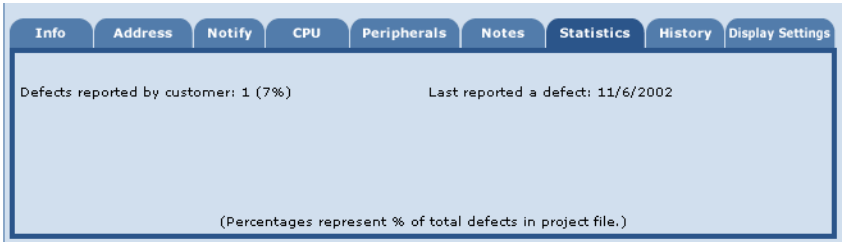
1 Click the **Customers** tab.

2 Select the customer and click **View**.

The View Customer dialog opens. All fields are read-only.

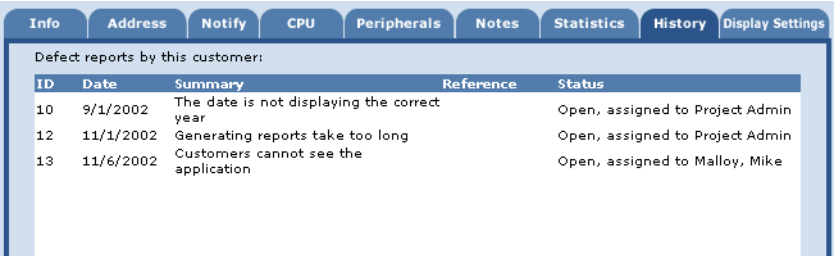
3 Click the **Statistics** tab.

This tab includes customer stats that are gathered and calculated for you.



4 Click the **History** tab.

This tab includes information about the defects the customer reported.



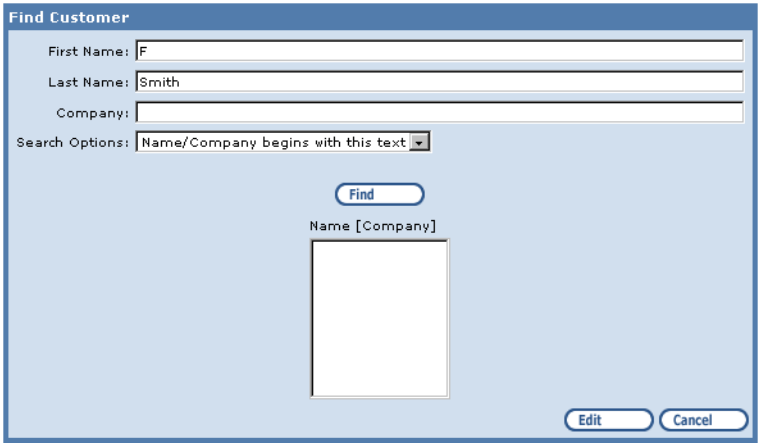
5 Click **Done** when you are finished.

Searching for customers

Most databases include a large number of customers. Searching provides an easy way to find a customer and edit their information.

1 Click the **Search** command button on the Customers list window.

The Find Customer dialog opens.



2 Enter the search criteria.

- Enter full, or partial, first name, last name, and company information.
- Leave a field blank if you do not want to include it in the search.

3 Select an option from the **Search Options** menu.

- **Name/Company begins with this text** looks for values beginning with the entered text.
- **Name/Company contains this text** looks for values containing the entered text.

4 Click **Find**.

Customers that match the search criteria are displayed in alphabetical order.

5 Select a customer and click **Edit** to modify their information.

For more information, see **Editing customers,** page 146.

For example, you are looking for a customer whose last name is Smith. You think his first name is either Frank or Fred. Enter an **F** in the **First Name** field and **Smith** in the **Last Name** field. Leave the **Company** field blank. Select **Name/Company begins with this text.** Click **Find.** All customers whose first name begins with F, and whose last name is Smith, are displayed.

Editing customers

1 Click the **Customers** tab.

2 Select the customer and click **Edit**.

The Edit Customer dialog opens.

3 Make any changes and click **Save**.

Your changes are saved.

Duplicating customers

If you are adding customers with the same basic information, you can save time by duplicating and modifying a customer.

1 Click the **Customers** tab.

2 Select the customer and click **Duplicate**.

The customer(s) is duplicated.

Modify the customer information and save your changes.

Activating customers

1 Click the **Customers** tab.

2 Select the customer and click **Activate**.

The customer is activated.

Making a user a customer

Use this command if you made a mistake and entered a customer as a user.

1 Click the **Users** tab.

2 Select the user and click **Make Customer**.

The user is converted to a customer and added to the customers list.

Inactivating customers

Deleting a customer can result in loss of historic information, such as reported by and defect action information. **Inactivate** customers to save historic information.

1 Select the customer on the Work with Customers page and click **Inactivate**.

You are prompted to confirm the inactivation.

2 Click **OK**.

The customer is inactivated.

Deleting customers

Deleting a customer can result in loss of historic information, such as reported by and defect action information.

1 Click the **Customers** tab.

2 Select the customer and click **Delete**.

You are prompted to confirm the deletion.

3 Click **Delete**.

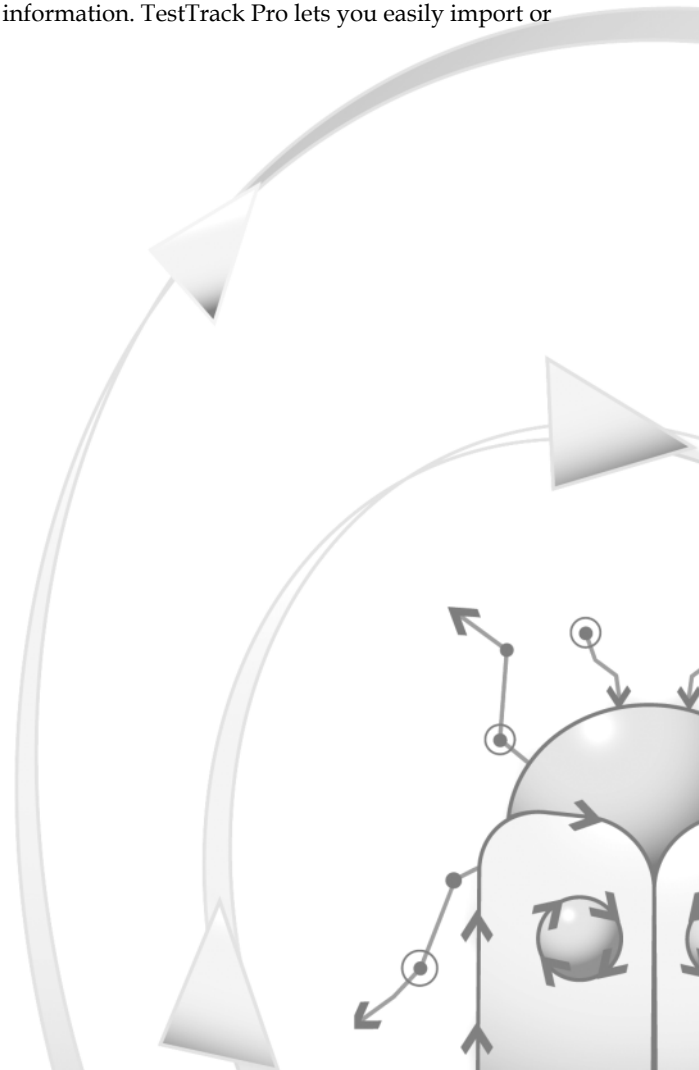
The customer is deleted.

Chapter 14
Importing and Exporting Files

Save time…

…and learn how to import or export record information. TestTrack Pro lets you easily import or export data using XML or text files.

This section includes:



About XML import/export

XML import/export includes the following advantages:

- You do not need to match fields when importing or exporting records.
- You can import and/or export multiple **Reported By** records.
- You can import and/or export multiples of the same defect actions.
- You can import and/or export more than one record type. For example, you can import/export defects and users in a single file.

Importing XML files

Import security access should be limited to administrative user groups. The misuse of this feature can result in a significant number of unwanted records in your database. The system administrator grants access to import/export commands.

XML import gives you the ability to import a large amount of data in a short period of time. Email notifications are not sent when you import files. The volume of email messages generated could cause some email servers to crash.

1 Click **XML Import**.

The Import XML dialog opens.

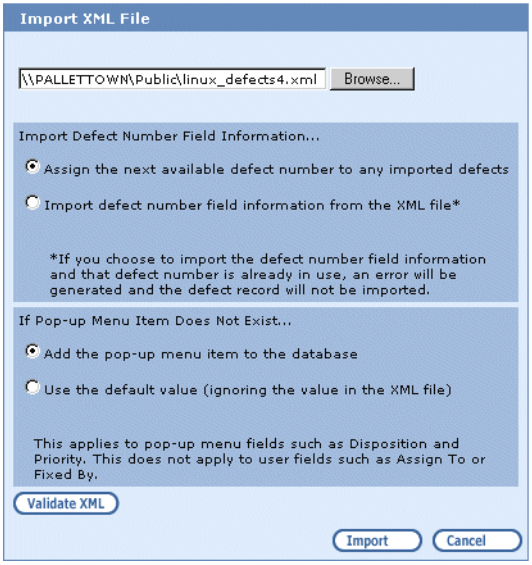
The XML Import link is available on the Defects, Customers, User Groups, or Test Configs tab.

2 Click **Browse** to select an XML file to import.

The Choose File dialog box opens.

3 Select the file and click **Open**.

You return to the Import XML dialog.



4 Select the **Defect Number Import** options.

- **Assign the next available defect number** automatically assigns the next available defect number for each defect being imported.
- **Import defect number field information** imports defect number information from the XML file. If the defect number already exists, an error will be generated and the defect record will not be imported.

The Defect Number Import options may be disabled depending on your database options.

5 Select the **Pop-up Menu Item** options.

These options apply to pop-up menu fields such as **Disposition** and **Priority** and do not apply to user fields.

- **Add the pop-up menu item to the database** automatically adds the pop-up menu item to the database.
- **Use the default value** uses the default value and ignores any value in the imported XML file.

6 Click **Validate XML File** to validate the file.

You should always validate the XML file before importing the file. If you import a file that has problems, some data will be imported and some will not be imported. It is easier to resolve the problem(s) in the XML file **before** importing than to clean up data in the TestTrack Pro database.

The XML Import Validation Message dialog opens, showing the results of the validation. If the XML format is **invalid** an error will be reported.

7 Click **OK** to return to the Import XML dialog.

8 Click **Import**.

The XML file is imported.

When a user field (such as **Found By** or **Fixed By**) is imported, TestTrack Pro tries to match the first name and last name with an existing user or customer. If an exact match is not found, the user/customer is created.

A defect's historical data is not imported. The historical data fields are system-generated. The **created by** and **modified by** fields are populated with the currently logged in user's name. The **date created** and **date last modified** fields are populated with the current date and time. The **creation method** field is populated with XML file import.

When importing, the password field can be either encrypted or in plain text. If TestTrack Pro generated the XML file, the password is encrypted. If a third-party XML file is imported, the password is in plain text.

Exporting XML files

Defects, users, customers, and test configs can be exported to an XML file.

1 Click the tab that corresponds to the types of records you want to export.

For example, click the **Defects** tab to export defect records.

2 Select the records you want to export.

3 Click **XML Export**.

The Export to XML File dialog opens.

4 Select the XML Export options.

5 Click **Export**.

The File Download box opens.

6 Click **Save**.

The Save As dialog box opens. Enter a filename and choose the location where you want to save the file.

7 Click **Save**.

The XML file is saved.

All calculated fields for a defect will be exported, but they will not be imported. Calculated fields are exported in case you want to import the XML file into a third-party application. Calculated fields that will be exported for a defect include **status** and **assigned to.**

User statistical data will be exported, but it will not be imported. User statistical data includes the following information: **defects found** and **defects assigned.**

Usernames and passwords are both exported. Usernames are exported in plain text; passwords are always exported as encrypted text.

XML import/export notes

- If you manually generate XML files or use a third-party application, you can import these XML files into TestTrack Pro. Refer to the **TestTrackData.dtd** file for proper formatting of your XML file.
- Do not modify the TestTrackData.dtd file. Modifying this file may result in validation errors or errors importing XML data.
- TestTrack Pro does not support namespaces in XML files that are being imported.
- Elements that you need to set to **<"not set">** should be left empty.

- The following examples are some of the **warning** messages that might be displayed as a result of the XML file validation. A **warning** means the record can be imported but some of the information could not be imported.
  - Could not find match for custom field (applies only to defects)
  - Could not find match for pop-up menu item value
  - Could not generate custom field value
  - A default value will be used instead of the specified value
- The following examples are some of the **error** messages that might be displayed as a result of the XML file validation. An **error** means the record cannot be imported.
  - Defect number already exists (applies only to defects and only if using the import defect number field information option).
  - Name already exists (applies only to users, customers, or test configs).
  - Username already exists (applies only to users or customers).
  - Two defects with same defect number in XML file (applies only to defects and only if using the import defect number field information).
  - Two entries with same name in XML file (applies only to users, customers, or test configs).
  - Two entries with same username in XML file (applies only to users or customers).
- Control characters cannot be imported into TestTrack Pro and will be removed when exporting text fields. This includes the following:

Hex Value	Explanation
0x01	Start of Heading
0x02	Start of Text
0x03	End of Text
0x04	End of Transmission
0x05	Enquiry
0x06	Acknowledge
0x07	Bell
0x08	Backspace

Hex Value	Explanation
0x0B	Vertical Tabulation
0x0C	Form Feed
0x0E	Shift Out
0x0F	Shift In
0x10	Data Link Escape
0x11	Device Control One
0x12	Device Control Two
0x13	Device Control Three
0x14	Device Control Four
0x15	Negative Acknowledge
0x16	Synchronous Idle
0x17	End of Transmission Block
0x18	Cancel
0x19	End of Medium

Due to XML specifications, you cannot export an item with a string field that contains control character. There is no way to escape this type of character data.

Sample XML document

The first three lines of every file TestTrack Pro generates when exporting to XML is the same. If you are generating your own XML files to import into TestTrack Pro, the first three lines must be the same, with the following exception; the value for the encoding attribute does not need to be specified.

Following is a sample from a TestTrack Pro XML document:

```
<?xml version="1.0" encoding="iso-8859-1" 8 standalone="no"?>
<!DOCTYPE TestTrackData SYSTEM 8 "TestTrackData.dtd">
<TestTrackData>
<! - -elements - - >
</TestTrackData>
```

The document begins with a processing instruction: **`<?xml ...?>.`** This is the **XML declaration**. It identifies the document as an XML document and indicates the version of XML to which it was authored. This declaration indicates that this document conforms to Version 1.0 of the XML standard. The **`encoding="iso-8859-1"`** indicates the character set used in encoding the XML document. The **`standalone="no"`** attribute informs the program that an outside DTD (document type definition) is needed to correctly interpret the document. The DTD will reside in a separate file called **TestTrackData.dtd**.

The second line points out the root element of the document, as well as the DTD that validates each of the document elements that appear inside the root element. The root element is the outermost element in the document that the DTD applies to. It typically denotes the document's starting and ending points. In this example, the **`<TestTrackData>`** element serves as the root element of the document. The system keyword indicates that the DTD of the document resides in a separate local file named **TestTrackData.dtd**.

About SoloBug

SoloBug is a stand-alone bug reporter that simplifies the way you receive bug reports and feature requests from customers and users. SoloBug:

- Eliminates data entry of bug reports and feature requests.
- Makes sure your bug reporting terminology is used.
- Captures personal information and computer information.
- Lets your customers and users include file attachments with their bug reports or feature requests.

What are SoloBug files?

A SoloBug file contains a single bug report, or feature request, created by customers and users. The SoloBug file is emailed to an address you specify. You can import the file into any TestTrack Pro database. A SoloBug file contains:

- The customer's or user's personal information and computer setup.
- A description of the problem or feature request.
- Any additional data or files attached to the SoloBug file.

How do I distribute SoloBug?

You can freely distribute SoloBug to customers, users, beta sites, etc. Refer to the SoloBug license included with TestTrack Pro for rules governing distribution of SoloBug applications. SoloBug is available for Windows, Macintosh, and the Palm OS.

SoloBug comes with a user guide you can edit and distribute. **Every topic** in the guide is included in the **online Help**, so you do not need to distribute the hard copy with SoloBug. You may want to customize the guide to include your company's name, email addresses, URLs, etc.

Importing SoloBug files

1. Click the **Defects** tab.

   The Work with Defects page opens.

2. Click **SoloBug Import**.

   The SoloBug Import dialog opens.

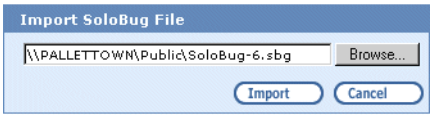
3. Click **Browse** to select the SoloBug file.

   The Choose file dialog box opens.

4 Select the file and click **Open**.

SoloBug files are saved with the **.sbg** extension.

5 You return to the SoloBug Import dialog.



6 Click **Import**.

The file is imported.

7 Click **Cancel** when you finish importing SoloBug files.

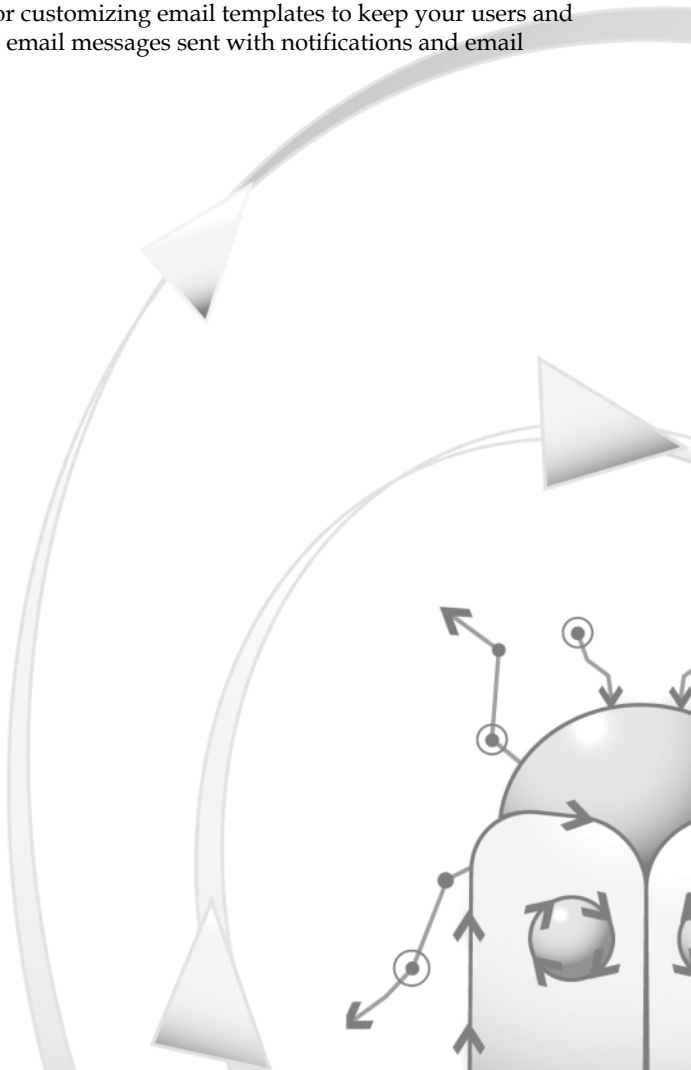
You return to the Work with Defects page. The SoloBug file is added to the end of the defect list. A new defect icon appears next to it.

Chapter 15
Customizing Email Templates

Give your users the information they need!

This chapter includes detailed information for customizing email templates to keep your users and customers up-to-date! Email templates affect email messages sent with notifications and email submissions.

This section includes:



About email templates

Email templates are used to standardize email messages sent to users and customers who request email notifications and for sending confirmations to users/customers who submit items via email.

TestTrack Pro email templates can be used as provided or the template contents can be customized. You can customize the templates by using field codes, entering text, or a little of both!

Email templates support **field codes**, sequences of characters and letters that TestTrack Pro replaces with corresponding data from the database. For example, **%CREL%** is replaced with the method used to create the defect (e.g., SoloBug import).

Appendix A, "Field Codes Reference", page 163 includes a complete list of field codes supported by TestTrack Pro.

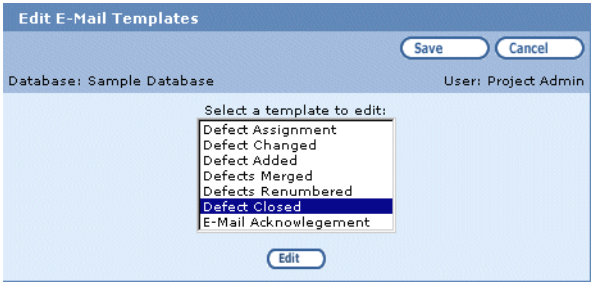
Customizing email templates

The TestTrack Pro administrator is generally responsible for customizing email templates.

1 Click the **Configure** tab.

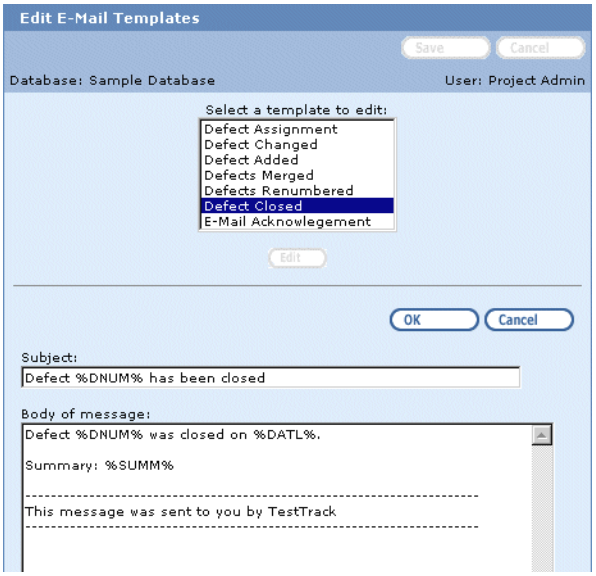
2 Click **Email Templates**.

The Edit Email Templates dialog opens.



3 Select an email template and click **Edit**.

The Edit Email Templates dialog expands with the Subject and Body of message fields.



4 Make any changes.

You can edit the subject and body of the email template, using regular text and field codes.

For a list of field codes, see **Appendix A, "Field Codes Reference"**, page 163.

5 Click **OK**.

The email template is saved.

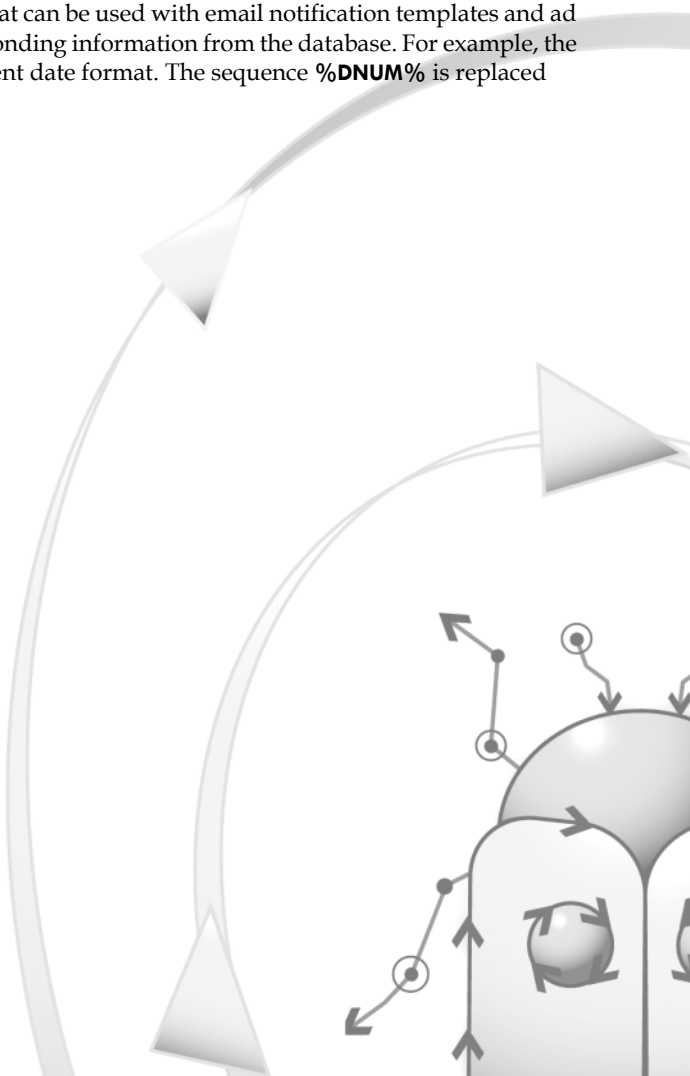
When you customize a template, any spaces and lines that you add are saved with the template. As you type, text is automatically wrapped to the next line. When an email message notification is sent, all field codes are automatically replaced with the corresponding data from the TestTrack Pro database.

Appendix A
Field Codes Reference

Use field codes to automatically generate data!

This appendix includes a list of field codes that can be used with email notification templates and ad hoc reporting. Field codes return the corresponding information from the database. For example, the sequence **%DATS%** is replaced with the current date format. The sequence **%DNUM%** is replaced with the defect number.

This section includes:



About field codes

Field codes are used to build customized email messages that provide information specific to the defect that triggered the notification or, in the case of an email acknowledgment, was imported via email. If you are creating an ad hoc report, you can use field codes to include specific database information for the report. You can also use field codes to build personalized SoloSubmit Web pages that provide information specific to your company and your customers' use of SoloSubmit.

Field codes

Field Code	Description
%ASSB%	The user who made the defect assignment.
%ASSD%	The date the defect was most recently assigned.
%ASST%	The user to which the defect is assigned.
%ASSN%	The most recent defect assignment notes.
%CF01% - %CF10%	Custom fields 1-10.
%CLSB%	The user who closed the defect.
%CLSD%	The date the defect was closed.
%CLSN%	The notes about closing the defect.
%CLSR%	The close resolution.
%CHNG%	The changes to the defect (only applies to **Defect Changed** notification).
%CMTA%	All of the defect's comments.
%CMTL%	The most recent defect comment.
%COMP%	The component containing the defect.
%CREB%	The user who was logged in when the defect was created.
%CRED%	The date the defect was created.
%CREL%	The method used to create the defect (e.g., SoloBug import).
%CUEM%	The currently logged in user's email address (does not apply to **Email Acknowledgement** notification).
%CUSR%	The currently logged in user's first and last name (does not apply to **Email Acknowledgement** notification).
%DATL%	The current date in long date format (mmmm, dd yyyy).
%DATS%	The current date in short date format (mm/dd/yy).
%DESC%	The first defect description.
%DISP%	The defect's disposition.
%DNUM%	The defect's number.
%DOCA%	Whether the most recent defect fix affects documentation.

Field Code	Description
%ENTB%	The user who entered the defect.
%ENTD%	The date the defect was entered.
%ESTB%	The user who most recently estimated the defect fix.
%ESTD%	The date of the most recent defect estimate.
%ESTE%	The most recent estimated effort to fix the defect.
%ESTN%	The notes of the most recent defect estimate.
%ESTV%	The defect's most recent estimated fix version.
%ESTW%	The defect's most recent estimated fix date.
%FILE%	The database's file name.
%FIXB%	The user who most recently fixed the defect.
%FIXD%	The date the defect was most recently fixed.
%FIXN%	The most recent notes about fixing the defect.
%FIXS%	The Fix Verify/Close value from the most recent fixed action.
%FIXT%	The total time required to fix the defect.
%FIXV%	The version in which the defect was fixed.
%FNDB%	The person who found the defect.
%FNDD%	The date the defect was found.
%FNDV%	The version in which the defect was found.
%MODB%	The user who last modified the defect.
%MODD%	The date the defect was last modified.
%NUMR%	The number of users and customers reporting the defect.
%PRIO%	The defect's priority.
%PRNM%	The Project Name field in the Project Info dialog.
%PROD%	The product containing the defect.
%REFR%	The defect's reference field.
%RELB%	The person who created the release notes.

Field Code	Description
%RELD%	The date the release notes were created.
%RELH%	Whether the defect has release notes.
%RELN%	The defect's most recent release notes.
%RELV%	The version in which the defect fix was released.
%REPR%	The defect's reproducible status.
%RESO%	The defect's fix resolution.
%SEQN%	The sequence number associated with the defect (applies only to **Email Acknowledgment** notification).
%SEVR%	The defect's severity.
%STAT%	The defect's status.
%STEP%	The steps to reproduce the defect.
%SUMM%	The defect's summary.
%TCFG%	The defect's test configuration name.
%TPLA%	Whether the most recent defect fix affects the test plan.
%TYPE%	The defect's type.
%VERB%	The user who most recently verified the defect.
%VERD%	The date the defect was most recently verified.
%VERN%	The most recent notes about verifying the defect.
%VERV%	The version in which the defect was verified.
%VPAS%	The Verify Pass/Close value from the most recent verify action.
%WORK%	The defect's workaround.
%WRKH%	Whether the defect has a workaround.

The **Defects Renumbered** email notification template can only use the following field codes:

%**CHNG**% Changes that were made (information about renumbered defects).

%**CUSR**% Currently logged in user's first/last name.

%**CUEM**% Currently logged in user's email address.

%**PRNM**% The project name field in the Project Info dialog.

%**FILE**% The database's file name.

This template cannot use field codes that refer to an individual defect's information.

Label field codes

TestTrack Pro lets you rename defect field labels. The renamed field labels have corresponding field codes. These field codes return the field label, not the field data.

Field Code	Field Name
%**DFUS_L**%	Defect - upper case, singular
%**DFUP_L**%	Defects - upper case, plural
%**DFUM_L**%	Defect(s) - upper case, singular/plural
%**DFLS_L**%	defect - lower case, singular
%**DFLP_L**%	defects - lower case, plural
%**DFLM_L**%	defect(s) - lower case, singular/plural
%**SUMM_L**%	Summary Type
%**TYPE_L**%	Type
%**DISP_L**%	Disposition
%**PRIO_L**%	Priority
%**PROD_L**%	Product
%**COMP_L**%	Component

Field Code	Field Name
%REFR_L%	Reference
%SEVR_L%	Severity
%ENTB_L%	Entered by
%ENTD_L%	Date Entered
%STAT_L%	Status
%FNDB_L%	Found by
%FNDD_L%	Date Found
%DATE_L%	Date (short form of Date Found)
%FNDV_L%	Version Found
%VERS_L%	Version (short form of Version Found)
%DESC_L%	Description
%REPR_L%	Reproduced
%STEP_L%	Steps to Reproduce
%TCFG_L%	Computer Config
%HWSW_L%	Other Hardware and Software
%CFTB_L%	Custom Field tab

Remember, renamed label field codes only return the label name and not the field data. For example, you rename Reference to Case Number. You customize an email template to notify managers of a problem, including the case number in the subject line. In the subject line of the template, enter %REFR_L%: %REFR%. When a manager is sent an email, the subject line includes: Case Number (label): case number (data).

Field code notes

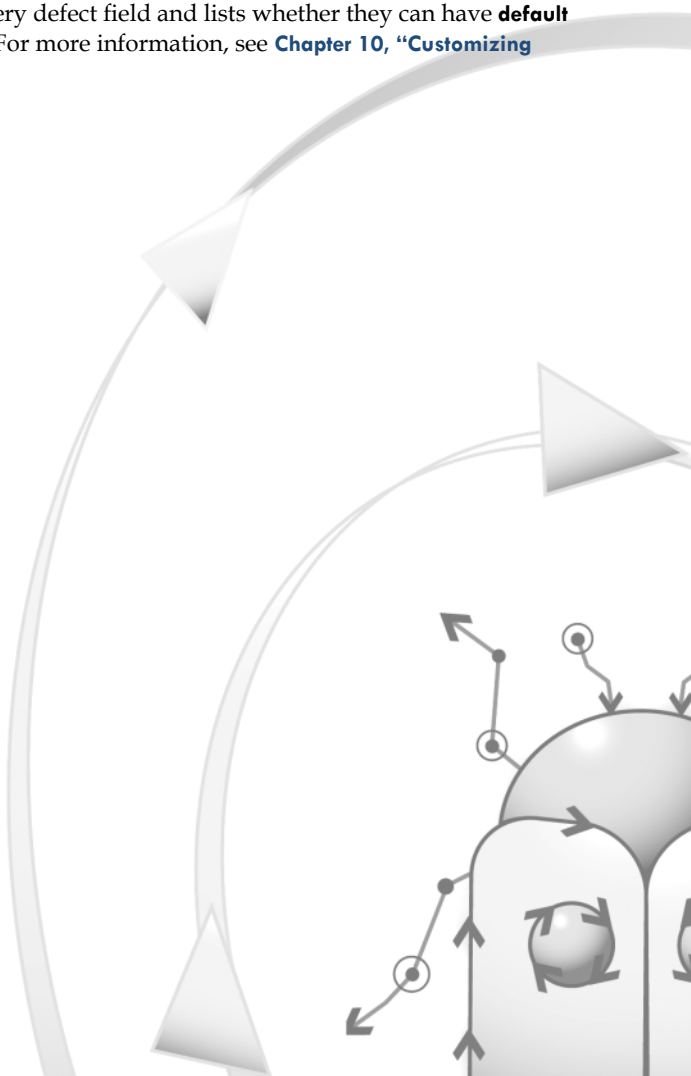
- All dates use system-defined date formats. TestTrack Pro uses the short-date style of the Regional Settings Properties defined in the Windows Operating System.
- To include a percent sign (%) in the body of a message, include two percent signs in a row (e.g., "%%").
- Email notifications support field codes in the email subject line. Therefore, you can include personalized subjects such as "Re:%SUMM%" which expand to include the defect's summary field in the email's subject.

Appendix B
Defect Fields Reference

About Defect Fields

This appendix includes tables that define every defect field and lists whether they can have **default values** or if they can be set as **required fields**. For more information, see **Chapter 10, "Customizing Fields,"** page 107.

This section includes:



Defect record

The following table lists the fields that are part of the **defect record**.

Field name	Set default value?	Initial default value	Configure as required?	Initially configured as required?
Summary	no	NA	yes	yes
Status	no	NA	no	NA
Type	yes	<not set>	yes	yes
Product	yes	<not set>	yes	no
Reference	no	NA	yes	no
Entered by	yes	<current user>	yes	yes
Disposition	yes	<not set>	yes	no
Priority	yes	<not set>	yes	no
Component	yes	<not set>	yes	no
Severity	yes	<not set>	yes	no
Date Entered	yes	<current date>	yes	no
Custom fields (pop-up menu)	yes	<not set>	yes	no
Custom fields (edit box)	no	NA	yes	no
History	no	NA	yes	no
Workaround	no	NA	yes	no
Notify	no	NA	no	NA

Found by record in a defect

The following table lists the fields that are part of the **found by record in a defect**. The default values are used every time a new found by record is created in the defect. The fields marked as required must be filled in for every found by record in the defect.

Field name	Set default value?	Initial default value	Configure as required?	Initially configured as required?
Found by	yes	<current user>	yes	yes
Date Found	yes	<current date>	yes	no
Version Found	yes	<not set>	yes	no
Description	no	NA	yes	no
Reproduced	yes	<not set>	yes	no
Steps to Reproduce	no	NA	yes	no
Computer Config	yes	"User Config"	yes	no
Other HW & SW	no	NA	yes	no
Attachments	no	NA	no	NA

Defect assignment record

The following table lists the fields that are part of the **defect assignment record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Assign to	yes	<blank>	yes	yes
Assigned by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Estimate to fix record

The following table lists the fields that are part of the **estimate to fix record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Estimated by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Estimated effort	no	NA	yes	no
Completion date	yes	<not set>	yes	no
Completion version	yes	<not set>	yes	no
Assumption	no	NA	yes	no

Fix defect record

The following table lists the fields that are part of the **fix defect record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Fixed by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Version	no	NA	yes	no
Resolution	yes	<not set>	yes	yes
Hours to fix	no	NA	yes	no
Affect documentation	yes	not checked	no	NA
Affect test plan	yes	not checked	no	NA
Notes	no	NA	yes	no

Release to testing record

The following table lists the fields that are part of the **release to testing record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Released by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Verify defect record

The following table lists the fields that are part of the **verify defect record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Verified by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Version	yes	<not set>	yes	no
Pass or fail	yes	Pass and close	no	NA
Notes	no	NA	yes	no

Release to customer testing record

The following table lists the fields that are part of the **release to customer testing record.**

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Released by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Customer verify defect record

The following table lists the fields that are part of the **customer verify defect record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Verified by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Version	yes	<not set>	yes	no
Pass or fail	yes	Pass and close	no	NA
Notes	no	NA	yes	no

Re-open defect record

The following table lists the fields that are part of the **re-open defect record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Re-opened by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Close defect record

The following table lists the fields that are part of the **close defect record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Closed by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Defect comments record

The following table lists the fields that are part of the **defect comments record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Commented by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Release notes record

The following table lists the fields that are part of the **release notes record**.

Field name	Set default value?	Initial default value selection	Configure as required	Initially configured as required?
Released by	yes	<current user>	yes	yes
Date	yes	<current date>	always	NA
Notes	no	NA	yes	no

Index

D

E

F

T

U

V

W

X