# TestTrack

**Simply Better Bug Tracking**

**version 1.6 for Macintosh**

User Manual

Seapine Software

**Third Edition**

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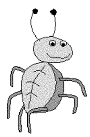


# About TestTrack

## Contents



## Welcome to TestTrack!

TestTrack is the premier bug tracking program for Windows 95 and NT. TestTrack lets you take control of your bug-tracking hassles.

Design a complex tracking structure, or simply install the software and **start tracking the TestTrack way**!

## On the TestTrack CD ROM

The TestTrack CD ROM contains:

- TestTrack 1.6 for Macintosh, Windows 95, and Windows NT 4.0
- Solo Bug 1.1 for Macintosh, Windows 3.1, Windows 95, and Windows NT 4.0
- Online Documentation and Help Files

Demos of TestTrack and other third-party products

## About your TestTrack User Manual

This user manual provides step-by-step instructions for all the tasks you perform when working with TestTrack and consists of the following chapters:

- Chapter 1, “Getting Started,” shows you how to start and quit TestTrack.
- Chapter 2, “Learning the Basics,” teaches you the basics. Be sure to read this chapter as a **jump-start** to TestTrack and to learn time-saving shortcuts.
- Chapter 3, “Working with Project Files,” explains how to create a single-user or multi-user project file. It also explains how to customize a project file, set preferences, and set a password.
- Chapter 4, “Working with Defects,” explains how to add defects (bugs, enhancements, change requests, or any other product-related issue you wish to remember and resolve) to the project file.
- Chapter 5, “Working with User Groups,” explains how to add user groups to the project file. User groups allow you to add command-level security to multi-user project files.
- Chapter 6, “Working with Users,” explains how to add TestTrack users to the project file.

- Chapter 7, “Working with Customers,” explains how to add customers to the project file.
- Chapter 8, “Working with Filters,” explains how to add filters to the project file. A filter is a powerful search and retrieval tool. You use filters to list only those defects you want to see (or report on).
- Chapter 9, “Working with Test Configurations,” explains how to add test configurations to the project file. A test configuration is the configuration on a specific computer used for testing.
- Chapter 10, “Working with Reports,” explains how to create and print reports.
- Chapter 11, “Working with the Workbook,” explains how to add, change, view, and delete To Do tasks in the Workbook. Use the Workbook to track your assignments and non-defect development tasks.
- Chapter 12, “Working with Solo Bug,” explains how to set up Solo Bug for your customers and how to import Solo Bug defect reports they have sent you.
- Chapter 13, “Working with E-mail Notifications,” explains how to set up e-mail notifications.
- Chapter 14, “Working with E-mail Import,” explains how to set up TestTrack to import bug reports from an e-mail account.
- Appendix A, “Field Codes,” details the fields codes used to create personalized e-mail notification templates.

# Things you should know before you start

Make sure you understand the following basic concepts before you use TestTrack:

**About your computer and printer**

This guide assumes your Macintosh and printer 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 Macintosh features, refer to the user's guide that came with your computer.

**About your defect tracking procedures**

Before you use TestTrack, you should think about how you want TestTrack to work for you. Do you want to set up a complex tracking structure to be used by many people and many departments? Or do you **simply** want to install the program and **start tracking**? —Or do you want to mix and match, using different scenarios for different project files?

TestTrack works any way you want it to! Chapter 3, "Working with Project Files," helps you decide how TestTrack can work best for you.

# How to contact TestTrack support services

We offer free TestTrack technical support Monday through Friday between 9 AM and 5 PM eastern-standard time.

| | |
|---|---|
| **Telephone Support** | 513-683-6456 |
| **Fax Support** | 513-683-1781 |
| **E-mail Support** | support@seapine.com |
| **Worldwide Web Address** | http://www.seapine.com |

**Note**

Check our Worldwide Web Site for the latest TestTrack and Solo Bug news, answers to frequently asked questions, and updates on TestTrack and Solo Bug.

# What you need to use TestTrack

You need the following hardware and software to use TestTrack for Macintosh:

- Macintosh 68020-68040 or Power Macintosh
- 4 MB of memory (2 MB free)
- System 7.0 or higher
- A CD-ROM drive (required for installation only)

# 1 Getting Started

## Contents



## 1-2-3 Start Tracking!

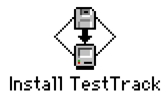
In minutes, you can install TestTrack and start tracking. Why wait any longer?

This chapter explains how to install, personalize, start, and quit TestTrack.

# Installing TestTrack

1. **Insert the TestTrack disk labeled "Install Me First" in the floppy drive.**

   The disk opens on the desktop. You can see the **Install TestTrack icon**.

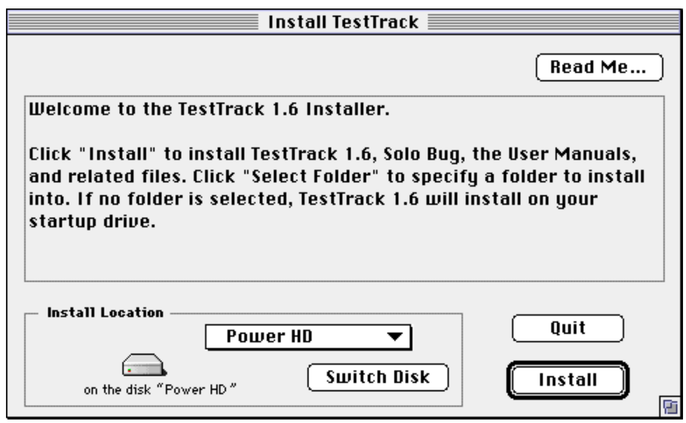
   
   

2. **Double-click the Install TestTrack icon.**

   The Install TestTrack splash screen appears.

3. **Choose Continue.**

   The Install TestTrack Welcome window appears.

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**Note** Click **Read Me** to review important information about TestTrack. From the Read Me window, choose **Print** to print the Read Me file. Choose **Save** to save the file to another location.

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4. **Choose Install.**

A progress bar appears showing the installation progress. When the installation is finished, a message tells you the installation was successful.

**Note** The Install TestTrack program installs TestTrack on the start-up volume. If you wish to install TestTrack on another volume, choose **Select Folder** and pick a new location.

5. **Choose Quit.**

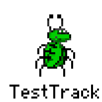
You are ready to start TestTrack for the first time!

**Note** The TestTrack User Manual is stored in Adobe Acrobat format. If you do not already have a copy of Adobe Acrobat 2.1 or newer on your hard drive, run the Adobe Acrobat Installer (it’s on the disk labeled Acrobat Disk 1; double-click the Install Acrobat icon).

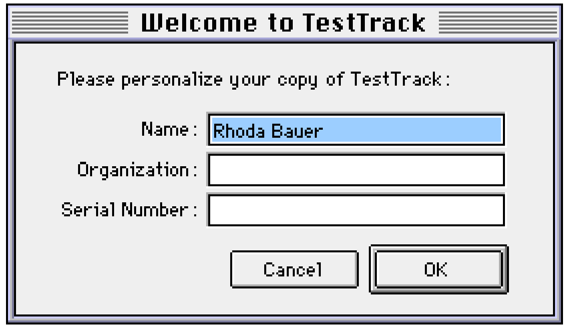
# Personalizing your copy of TestTrack

To start TestTrack **for the first time** and personalize your copy:

1. **Double-click the TestTrack icon.**



The TestTrack Registration window appears. The Name field defaults to the name of your computer. You may enter a new name if you wish.




**2. Enter a name in the Organization field.**

Commonly, users enter their company's name in this field, but you may enter a department name or anything else.

**3. Enter your serial number.**

You can find your serial number on the inside front cover of the TestTrack user manual. Enter the number exactly as you see it—this is a case-sensitive field.

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**Note** If you've lost your serial number and you're a **registered user**, contact us. We can tell you your serial number over the phone or via e-mail. If you purchased TestTrack directly from Seapine Software, you are registered automatically.

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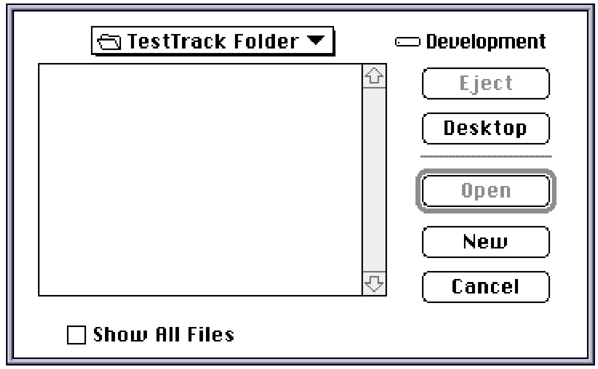
**4. Choose OK.**

The Open File dialog box appears.




**Where to go next...**

At this time you can:

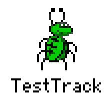
- Choose **New** to open a project file and start tracking. See Chapter 3, “Working with Project Files,” to continue.
- Choose **Cancel** to close the Open File dialog box.

## Starting TestTrack

**Note** The **first time** you start TestTrack you are prompted to enter your serial number. See “Personalizing your copy of TestTrack,” previous, if you have not done so already.

To start TestTrack:

1. **Double-click the TestTrack icon.**




TestTrack remembers the last project file you had open and opens it automatically when you start the program.

**Note** If you prefer, you can set TestTrack to default to the **Open File** dialog box instead of automatically opening the last-used file. See “Setting preferences” in Chapter 3, “Working with Project Files.”

**Single-user project file** If you open a single-user project file, TestTrack opens the file without prompting you for anything, unless it is password protected. In which case you enter the password and click **OK**.

**Multi-user project file** If you open a multi-user project file, TestTrack prompts you for a user name and password. Enter the information and click **OK**.

## Exiting TestTrack

1. **Choose Quit from the File menu.**

TestTrack closes.

# 2 Learning the Basics

## Contents

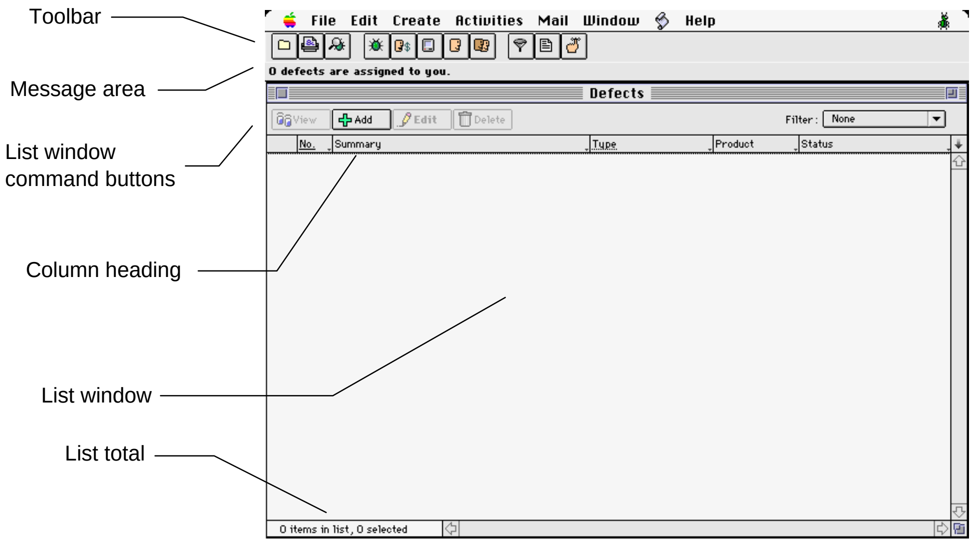


## Take a tour!

TestTrack is easy to use, but it's even easier when you know the basics and the shortcuts.

This chapter takes you on a tour of TestTrack. Use it to start you on your way.

The first time you start TestTrack, a blank Defects list window appears. The following graphic points out each part of TestTrack:

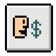


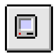

# Opening a list window

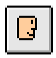
TestTrack tracks defects, test configurations, users, and user groups. It also lets you use filters and reports to manage and analyze your data. Each item you can work with appears in its own list window.

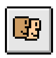
The toolbar contains command buttons to open each list window—and they are just a click away!


Opens the Defects list window


Opens the Customers list window


Opens the Test Configurations list window


Opens the Users list window

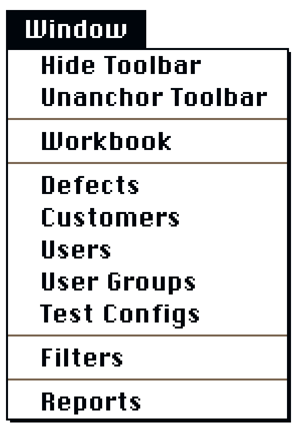

Opens the User Groups list window


Opens the Filters list window


Opens the Reports list window


Opens the Workbook list window

If you prefer to use the menu, the commands are there too. Simply select the item's name from the **Window** menu.



## Using a list window

All seven of TestTrack's list windows function the same way. You can organize the data in the window any way you wish. You can do the following in a list window:

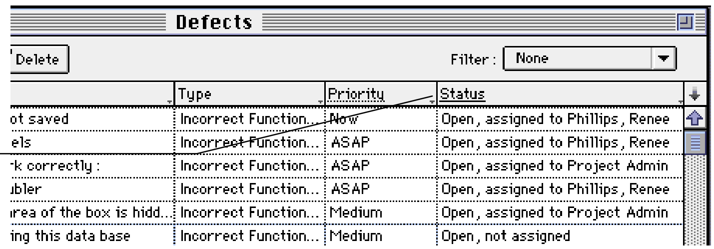
- Sort by column (primary and secondary sorts)
- Sort in ascending or descending order
- Change the width of a column
- Change the contents of a column
- Add or delete a column
- Select multiple items for viewing, editing, deleting, and printing
- Use shortcut command buttons
- Identify new defects, closed defects, and defects assigned to you—at a glance

# Sorting by column

You may sort by any column at any time, and you may perform primary and secondary sorts:

**Primary sort**

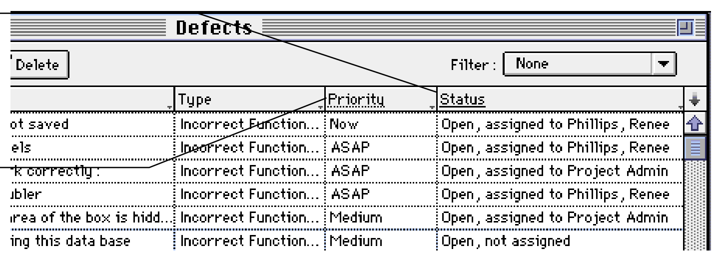
To select a new column to sort by, **click** on the column heading. A single tick mark appears to the right of the column heading. For example, the following list is sorted by Status:




This list is sorted by Status.

**Secondary sort**

To select a secondary column to sort by, **shift-click** on the column heading Two tick marks appear to the right of the column heading (the primary column heading remains the same). For example, the following list is sorted first by Status and then by Priority.




The primary sort is by Status.

The secondary sort is by Priority.

## Changing the sort order of a column

With the click of a button, you can change the order in which a column is sorted from ascending to descending, or vice versa.

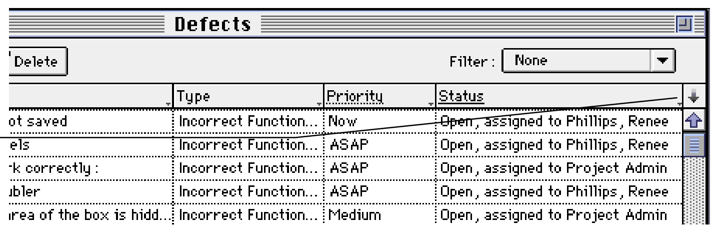
To change the sort order:

**1 Click on the column heading you want to work with.**

**2 Click the Sort Order icon.**

The Sort Order icon is located on the far right side of the list window just above the scroll bar. The icon toggles between ascending and descending order.

Click the Sort Order icon to toggle between ascending and descending order.



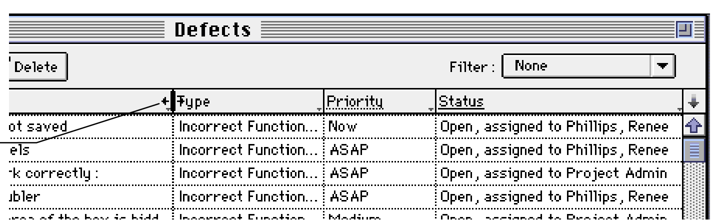

## Changing the width of a column

To make a column wider or narrower:

**1 Move the cursor to the divide bar located between the column headings.**

The cursor changes to a **Resize** cursor.

Position the Resize cursor between the column headings.




**2 Click and drag the divide bar to a new position.**

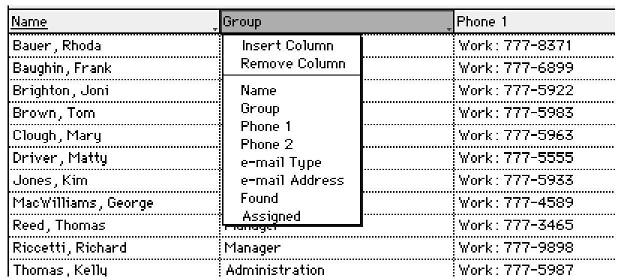
The action changes the width of the column to the left of the divide bar.

## Changing the contents of a column

At any time you can change what is listed in a column by selecting a new field for the column heading. To select a new field:

**1** **Click on the column heading you want to change and hold down the mouse button until a pop-up menu appears.**

The pop-up menu lists all the available fields.




**2** **Release the mouse button when you've highlighted the desired field.**

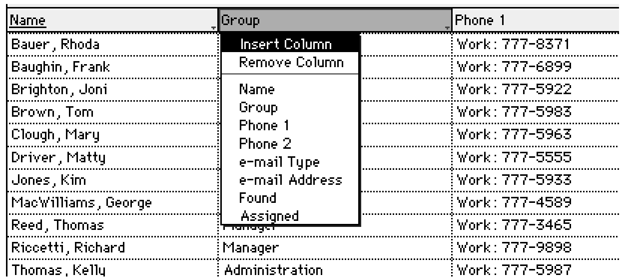
The column heading changes to the new field and the contents of the column changes to match it.

## Adding a column

To add a column:

**1** **Click on the column heading you want to add a column next to (inserts to left), and hold down the mouse button until a pop-up menu appears.**

The pop-up menu lists all the available fields, plus two additional commands: **Insert Column** and **Remove Column**.

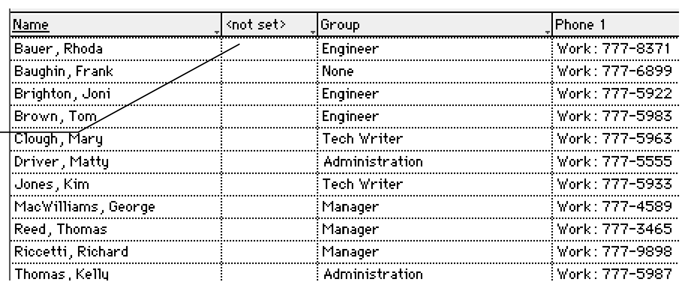



| Name | Group | Phone 1 |
|---|---|---|
| Bauer, Rhoda | | Work: 777-8371 |
| Baughin, Frank | | Work: 777-6899 |
| Brighton, Joni | | Work: 777-5922 |
| Brown, Tom | | Work: 777-5983 |
| Clough, Mary | | Work: 777-5963 |
| Driver, Matty | | Work: 777-5555 |
| Jones, Kim | | Work: 777-5933 |
| MacWilliams, George | | Work: 777-4589 |
| Reed, Thomas | | Work: 777-3465 |
| Riccetti, Richard | Manager | Work: 777-9898 |
| Thomas, Kelly | Administration | Work: 777-5987 |

**2** **Release the mouse button when you've highlighted Insert Column.**

A blank column is added to the left. You can now select a field for its contents. See "Changing the contents of a column," previous, if you need to review.

Select a column heading from the pop-up menu.



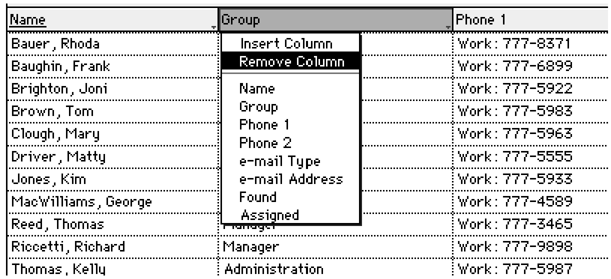
| Name | <not set> | Group | Phone 1 |
|---|---|---|---|
| Bauer, Rhoda | | Engineer | Work: 777-8371 |
| Baughin, Frank | | None | Work: 777-6899 |
| Brighton, Joni | | Engineer | Work: 777-5922 |
| Brown, Tom | | Engineer | Work: 777-5983 |
| Clough, Mary | | Tech Writer | Work: 777-5963 |
| Driver, Matty | | Administration | Work: 777-5555 |
| Jones, Kim | | Tech Writer | Work: 777-5933 |
| MacWilliams, George | | Manager | Work: 777-4589 |
| Reed, Thomas | | Manager | Work: 777-3465 |
| Riccetti, Richard | | Manager | Work: 777-9898 |
| Thomas, Kelly | | Administration | Work: 777-5987 |

## Deleting a column

To delete a column:

1 **Click on the column heading you want to delete, and hold down the mouse button until the pop-up menu appears.**

The pop-up menu lists all the available fields, plus two additional commands: **Insert Column** and **Remove Column**.



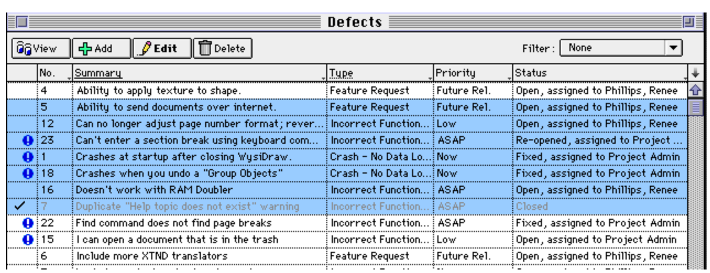

2 **Release the mouse button when you’ve highlighted Remove Column.**

The column is removed.

## Selecting multiple items

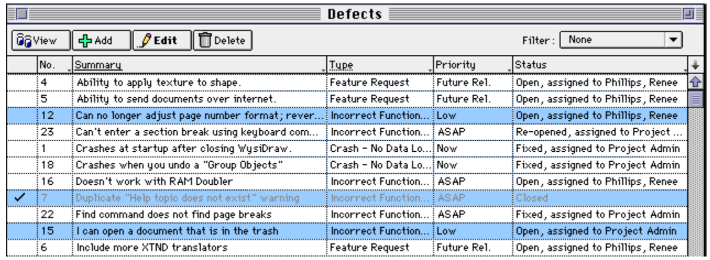
You can select multiple items to view, edit, delete, and print:

**Range** To select a range of items, **click** the first item in the range, then **shift-click** the last item.



**Items not in a range**

To select multiple items not in a range, **command-click** each item.




# Using the command buttons

Each of the six TestTrack list windows has the following four command buttons:

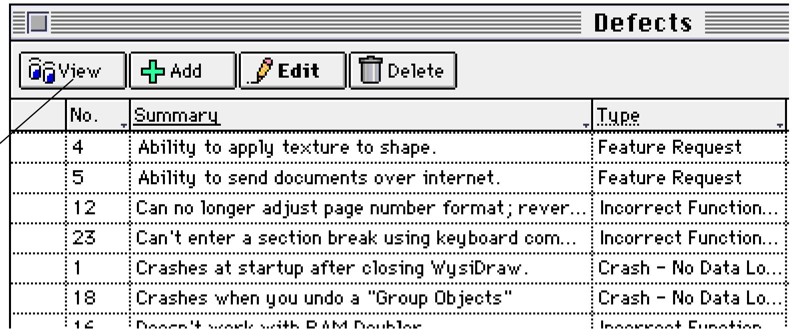

Opens the selected item’s View dialog box.


Opens the selected item’s Add dialog box.


Opens the selected item’s Edit dialog box.


Deletes the selected item from the list window.

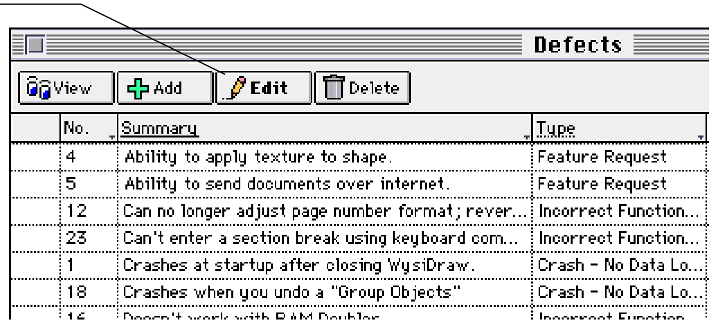
The command buttons are located at the top of every list window.




**Tip** You can set **double-clicking** preferences for the **View** and **Edit** command buttons. For example, if the **Edit** button is bold, you can **double-click** an item to select it and open the Edit dialog box at the same time. See “Setting preferences” in Chapter 3, “Working with Project Files,” for details.

Since the Edit command button is bold....

... the Edit dialog box appears when you double-click an item.



# Looking at the defect indicators

**Defect indicators** appear in the first column of the Defects list window. They point out new defects, closed defects, and defects assigned to you. The following shows a sample of each indicator:

The **New Defect** indicator points out any defects added to the project file since you last logged in.

The **Defect Changed** indicator points out any defects that have changed since you last logged in.

The **Closed Defect** indicator points out any closed defects.

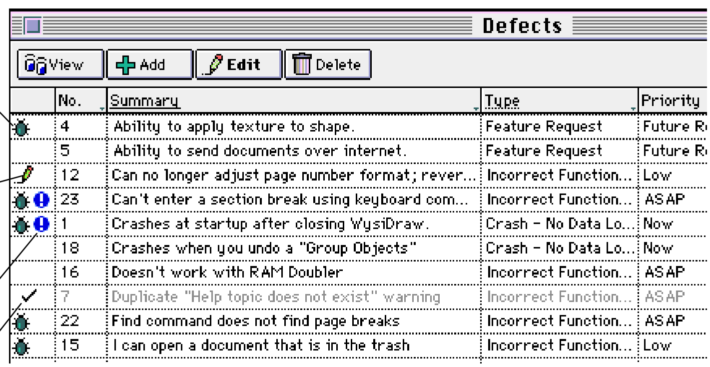
The **Assigned Defect** indicator points out any defects that have been assigned to you (the current user).

This defect is new since you last logged in.

This defect changed since you last logged in.

This defect is assigned to you.

This defect is closed.

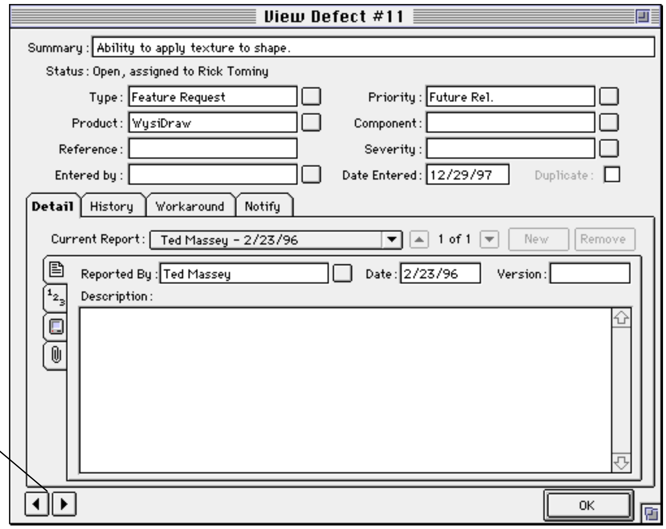



| | No. | Summary | Type | Priority |
|---|---|---|---|---|
| | 4 | Ability to apply texture to shape. | Feature Request | Future R |
| | 5 | Ability to send documents over internet. | Feature Request | Future R |
| | 12 | Can no longer adjust page number format; rever... | Incorrect Function... | Low |
| | 23 | Can't enter a section break using keyboard com... | Incorrect Function... | ASAP |
| | 1 | Crashes at startup after closing WysiDraw. | Crash - No Data Lo... | Now |
| | 18 | Crashes when you undo a "Group Objects" | Crash - No Data Lo... | Now |
| | 16 | Doesn't work with RAM Doubler | Incorrect Function... | ASAP |
| | 7 | Duplicate "Help topic does not exist" warning | Incorrect Function... | ASAP |
| | 22 | Find command does not find page breaks | Incorrect Function... | ASAP |
| | 15 | I can open a document that is in the trash | Incorrect Function... | Low |

**Note** Notice that the closed defect is **grayed out**. You can set this preference in the Preference dialog box. See “Setting preferences” in Chapter 3, “Working with Project Files.”

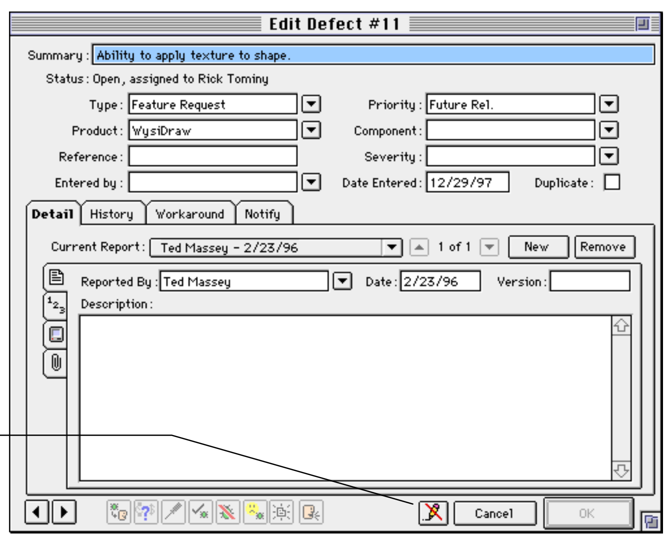
# Using the Edit and View dialog boxes

When you open the **View** and **Edit** dialog boxes, **next** and **previous arrows** appear at the bottom of the dialog boxes. Click the arrows to page through the items.




Click the arrows to page through the selected items.

If you open the Edit dialog box to edit an item, and it is already being edited by another user, a **Read-only** icon appears beside the Cancel button. You can't edit an item when the Read-only icon is present.




You can't edit an item when the Read-only icon is present.

If you **click the Read-only icon**, a message box appears listing the name of the user currently editing the item.


When the user finishes editing the item, the Read-only icon disappears, and the dialog box updates with any changes the user made. You are now free to edit the item.

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**Note** When a record is **read only**, TestTrack checks the project file every 10 seconds for changes no matter what interval you set in the Preferences dialog box. This way the item frees up as soon as the other user is finished with it.

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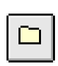
## Using the toolbar

You already know that you can use the command buttons on the toolbar to open TestTrack's list windows, but you can use the toolbar for more. The toolbar contains the following additional command buttons:



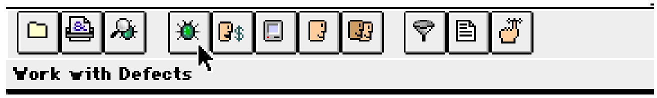
Opens an existing project file. TestTrack automatically closes the current project file before it opens a new one.

Opens the Print Options dialog box. See "Printing," later in this chapter, to learn your printing options.

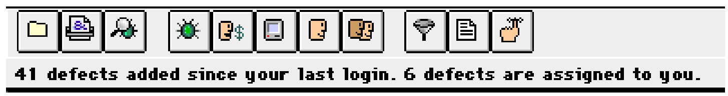
Opens the Find Defects dialog box. See "Finding defects," in Chapter 4, "Working with Defects", to learn about this quick-find option.

The tool bar also contains a message area. TestTrack posts messages here that don’t require your feedback. The following lists a few of the messages you may see:

- When you place the cursor over a command button in the toolbar, a short description of the command appears.




- When you open a multi-user project file, the message area lists how many defects are assigned to you and how many have been added since you last logged in.




---

**Note** The toolbar is anchored to its present location, but you can unanchor it and move it to another part of the screen: choose **Unanchor Toolbar** from the Windows menu. Choose **Anchor Toolbar** to re-anchor the toolbar.

If you want to remove the toolbar, choose **Hide Toolbar** from the Windows menu. To reinstate the Toolbar, choose **Show Toolbar** from the Windows menu.

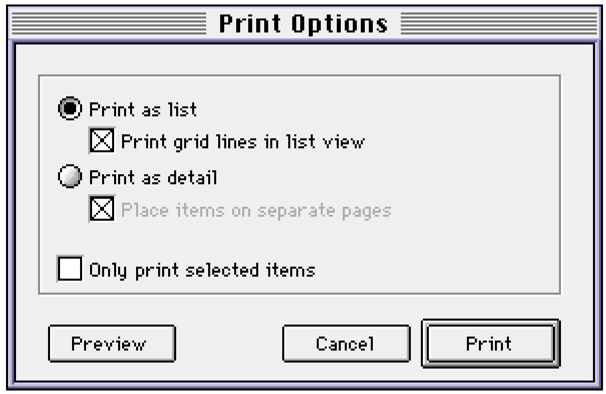
---

# Printing

To print:

**1** **Choose Print from the File menu, or click the Print button located on the toolbar.**

The Print Options dialog box appears.




**2** **Make your selections.**

Select one of the following radio buttons:

**Print as list** Prints the items in a list as you see them. The column widths are adjusted automatically based on the length of the longest field value. Select the check box if you want **grid lines** to print.

**Print as detail** Prints the details for each item. Select the check box if you want each item printed on its own page.

---

**Note** If you do not want to print every item in the list, go back to the list window and select the items you want to print; then return to the Print Options dialog box and select the **Only Print Selected Items** check box.

---

**3 Choose Preview or Print.**

The following describes your choices:

**Preview** The Print Preview dialog box appears. Page through the window to check your selections. Choose **Page Setup** if you want to change the layout settings. When you're satisfied with the preview, click **Print**. The Printer dialog box appears. Choose your settings and click **Print** again.

**Print** The Printer dialog box appears. Choose your settings and click **Print**.

# 3 Working with Project Files

## Contents



## Lay the foundation!

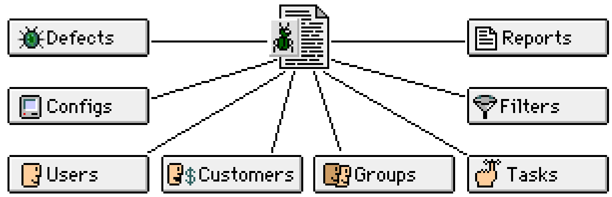
Sound hard? It's not—simply give the project file a name and choose whether it is a multi-user or single-user file.

If you wish, you can customize the project file by configuring the field values to match your organization's nomenclature. However, TestTrack comes fully operational with generic default values, so you can skip this task and **start tracking**!

This chapter explains how to create project files. You also learn how to set passwords to protect them. The chapter starts with an explanation of multi-user and single-user.

# About project files

A project file holds all the data you keep track of in TestTrack.




The information in a project file is specific to that file. It is not shared among other project files. When you create a project file, you can make it a **single-user** project file or a **multi-user** project file:

**Single-user project file**

Only one person can access a single-user project file at a time. A single-user project file is ideal for consultants, individuals tracking bugs on their own projects, and small teams where security is not an issue. On a single-user project file, you can set a password to protect the file.

**Multi-user project file**

Unlimited numbers of users can access a multi-user project file over a network. A multi-user project file is ideal for large groups of users in organized testing efforts. Multi-user project files let you take advantage of command-level security, notifications, and shared filters and reports

---

**Note**

TestTrack uses file sharing to implement multi-user access. An AppleShare-compatible file server, Windows NT Server, or Macintosh Personal File Sharing all work fine in multi-user environments.

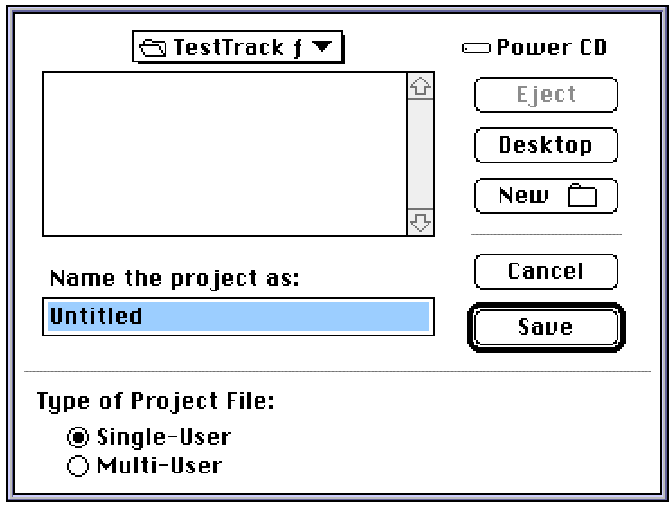
---

# Creating a project file

To create a project file:

**1 Choose New Project from the File menu.**

The New File dialog box appears.




**Note** If you chose **New** from the Open File dialog box when you started TestTrack, you already performed this step. Move on to step 2.

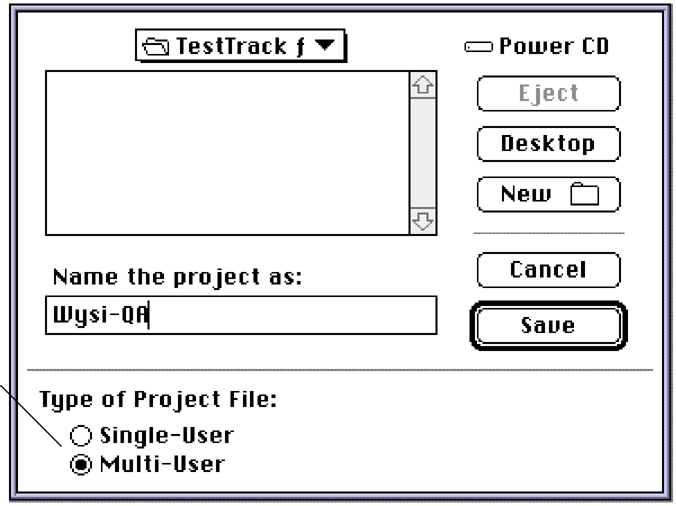
**2 Type a name for the project file.**

The name can be up to 32 characters long.

**3 Choose the type of project file.**

Choose **Multi-user** if you plan to use TestTrack on a network and share your data with others; otherwise, choose **Single-user**.

Be sure to select the type of project file.

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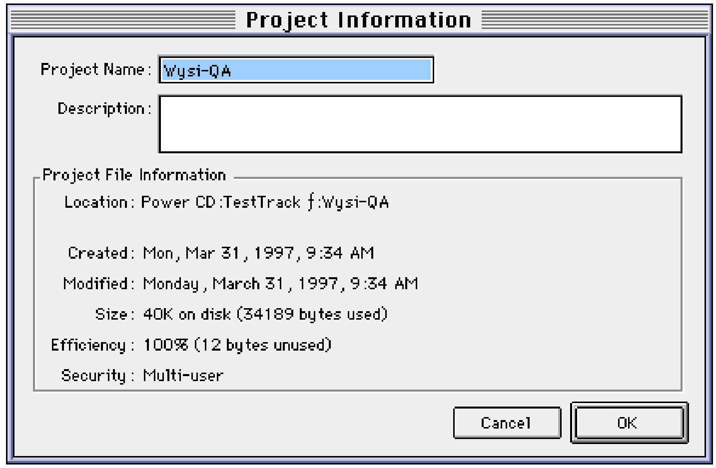
**Note** You can't change a single-user project file to a multi-user project file, or vise-versa, after you create the project file. Make sure you choose the correct setting before you begin adding data.

---

**4 Choose Save.**

If you created a **multi-user** project file, the Welcome to TestTrack dialog box appears suggesting you set a password for the user name "Admin." Choose **OK**.

The Project Information dialog box appears. The cursor is on the Project Name field. You may change the name, or move to the Description field.




**If you want to know more...**

When you create a **multi-user** project file, TestTrack automatically assigns you the user name “admin” and places you in user group “administration.”

The user group “administration” has complete security clearance. To protect this security level from unauthorized users, set a password. Do it now by selecting **Set Password** from the File menu. See “Setting a password,” later in this chapter, if you need further instructions.

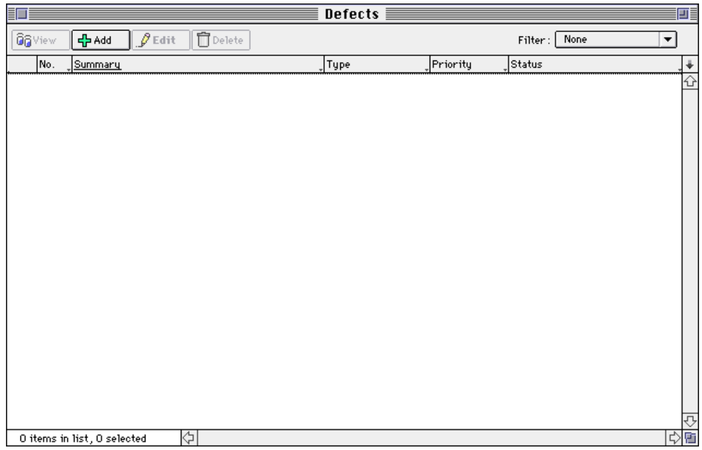
As project administrator, you are responsible for performing tasks such as adding users, setting security levels, and maintaining the database. You learn more about this in Chapter 5, “Working with User Groups.”

**5 Type a description.**

The description may be up to 255 characters. You should provide more information about the project, such as the name of the QA leader or project leader.

**6 Choose OK.**

The Defects list window appears.




**Where to go next...**

At this time you can:

- Customize the project file’s field values to match your organization’s terms. See “Configuring a project file,” next, for instructions. TestTrack comes with generic field values, so if you prefer, you can **skip this task** and move on to Chapter 4, “Working with Defects.”

- Add user groups and users to the project file. If you’re using a **multi-user project file**, do this before you work with defects. See Chapter 5, “Working with User Groups,” for instructions.

- Define e-mail notification settings. Do this before you begin working with defects to ensure all users receive notifications when the first defects are added. See Chapter 13, “Working with E-mail Notifications,” for instructions.

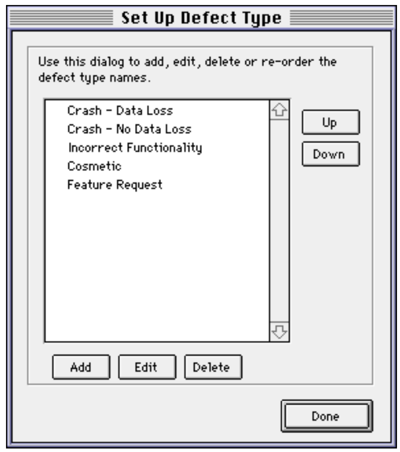
# Configuring field values

Configuring field values in TestTrack is quick and easy. The changes you make affect only the project file you're working on. They do not affect other project files.

You can configure values for the following fields:

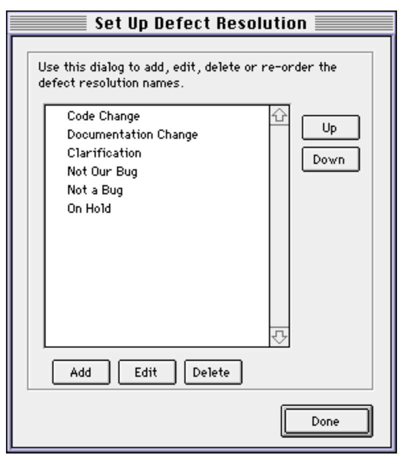
**Defect Types**

Defect type values explain the kind of defect you've found. TestTrack comes with the following default values:



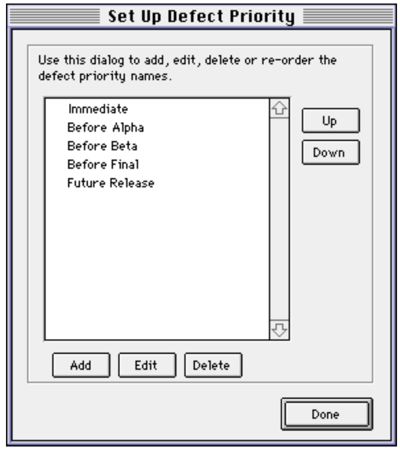

**Defect Resolutions**

Defect resolution values explain how the bug was fixed. TestTrack comes with the following default resolutions:



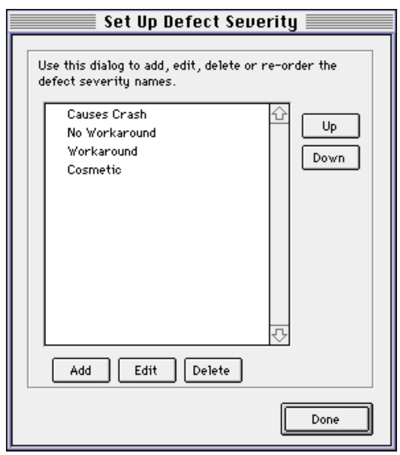
## Defect Priorities

Defect priority values rank when to fix one bug relative to another. TestTrack comes with the following default priorities:



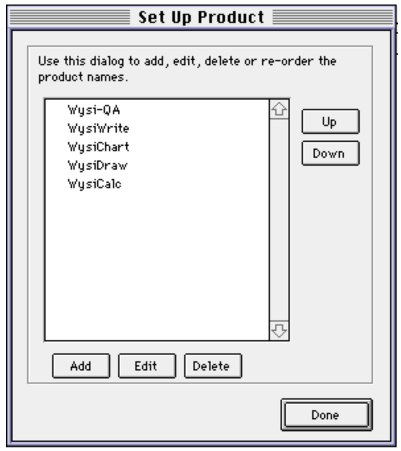

## Defect Severity

Defect severity values rank a bugs importance to the customer. For example, a data corruption bug is more severe than a functionality bug with a workaround. TestTrack comes with the following default severities:



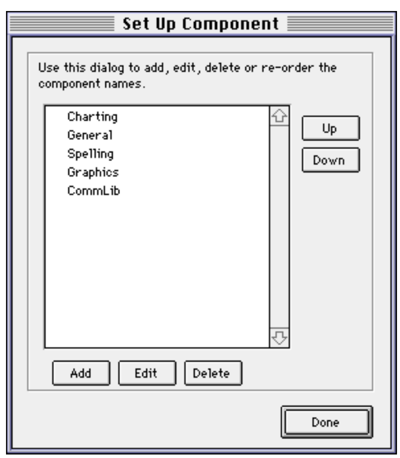
## Product Names

Product name values describe modules or products tracked in a project. For example, a product named WysiApp may consist of WysiWrite, WysiChart, WysiCalc, and WysiDraw. Simply add these names to track bugs by module! Since these field values are specific to your project, TestTrack does not come with default product name values. However, TestTrack adds the name of your project file to the list to get you started.



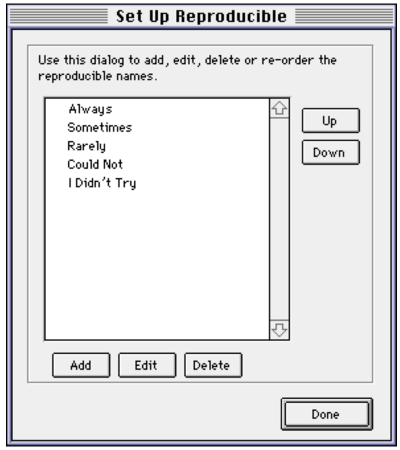

## Components

Component values describe parts common to products or projects. For example, you may use a charting module in more than one of your products. Since these field values are specific to your project, TestTrack does not come with default component values.



**Reproducible Levels**

Reproducible Level values describe whether a user could reproduce a problem.




## Adding a field value

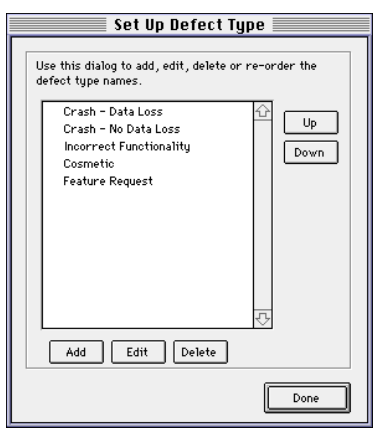
1 **Choose the item you want to customize from Configure on the Activities menu.**

---

**Note** In this example, we work with **Defect Types**. However, whether you choose Defect Resolutions, Defect Priorities, or Product Names, you follow the same instructions.

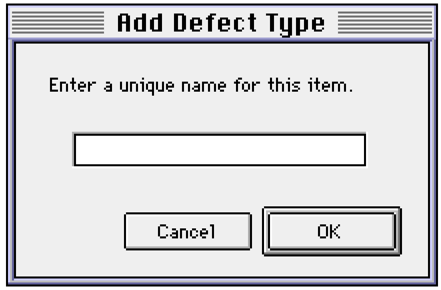
---

The Set Up Defect Types dialog box appears.



**2 Click Add.**

The Add Defect Type dialog box appears.




**3 Type a name for the new defect type.**

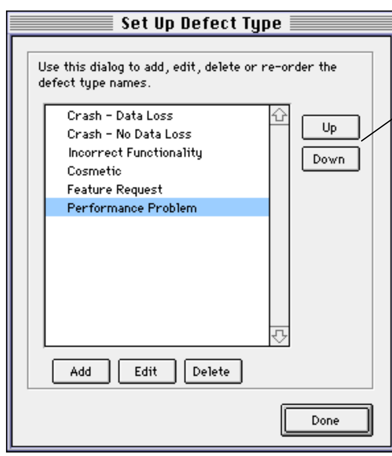
You are limited to 32 characters.

**4 Choose OK.**

The Add Defect Type dialog box closes and you return to the Set Up Defect Type dialog box. The new name appears at the bottom of the list.

---

**Note** To move the name to a new position in the list: select the name and click the **Up** button. If you move it too far, click the **Down** button.




Use these buttons to reposition the selected field value.

---

5 **Choose Close.**

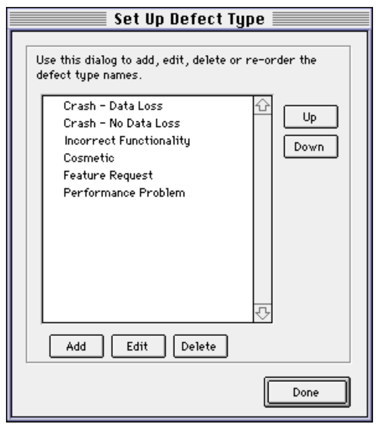
The dialog box closes.

## Changing a field value

1 **Choose the item you want to customize from Configure on the Activities menu.**

**Note** In this example, we work with **Defect Types**. However, whether you choose Defect Resolutions, Defect Priorities, or Product Names, you follow the same instructions.

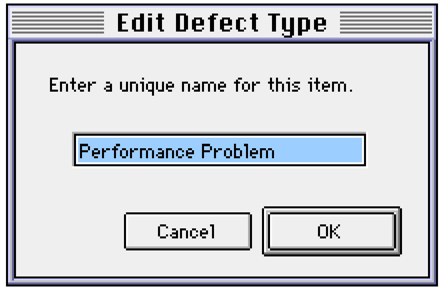
The Set Up Defect Types dialog box appears.




2 **Select the name you want to change.**

**3 Click Edit.**

The Edit Defect Type dialog box appears.



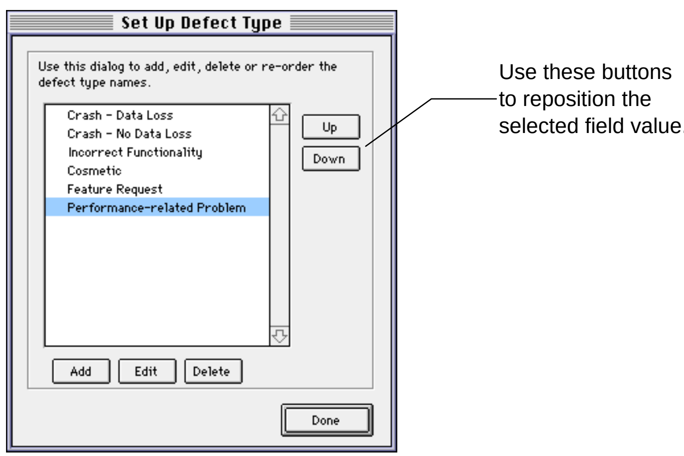

**4 Change the name.**

**5 Choose OK.**

The Edit Defect Type dialog box closes and you return to the Set Up Defect Type dialog box. The new name appears in the same location.

---

**Note** To move the name to a new position in the list: select the name and click the **Up** or **Down** button.




---

**6 Choose Close.**

The dialog box closes.

## Deleting a field value

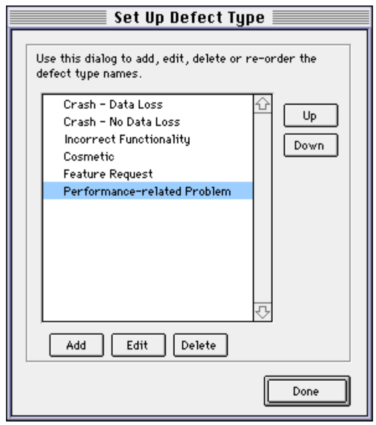
**1 Choose the item you want to customize from Configure on the Activities menu.**

---

**Note** In this example, we work with **Defect Types**. However, whether you choose Defect Resolutions, Defect Priorities, or Product Names, you follow the same instructions.

---

The Set Up Defect Types dialog box appears.

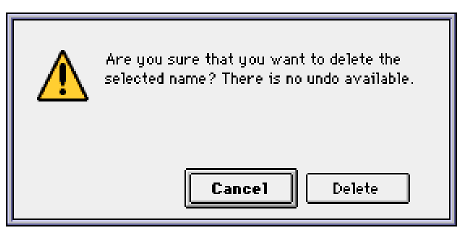



**2 Select the name you want to delete.**

The name is highlighted.

**3 Click Delete.**

The Delete Confirmation dialog box appears.



**4 Choose OK.**

The name is removed from the list box.

---

**Note** If the field value is used in any defect, TestTrack prompts you to reassign it to one of the existing names.

---

**5 Choose Close.**

The dialog box closes.

# Setting a password

In a **single-user** project file, you set a password to protect the project file. In a **multi-user** project file, you set a password to prevent others from gaining access to your security level.

**1 Open the file you want to protect with a password.**

This step does not pertain to **multi-user** project files since the password is tied to the user name—not the project file.

**2 Choose Set Password from the File menu.**

The New Password dialog box appears.

**3 Type your password and click OK.**

The Verify Password dialog box appears.


**4 Type the password again to confirm it, and click OK.**

From now on, in a **single-user** project file, TestTrack prompts you for the password before you can open the project file. In a **multi-user** project file, TestTrack requires you enter a password when you enter your user name.

# Changing or removing a password

Periodically you may want to change your password. Changing a password works the same for a single-user and a multi-user project file.

**1 Open the file whose password you want to change or remove.**

This step does not pertain to **multi-user** project files since the password is tied to the user name—not the project file.

**2 Choose Set Password from the File menu.**

The Old Password dialog box appears.

**3 Type your old password and click OK.**

The New Password dialog box appears.


**4 Type a new password and click OK.**

The Verify Password dialog box appears.


**Note** If you want to remove the password, leave the field **blank** and click **OK**. TestTrack removes the current password.

**5 Type the password again to confirm it, and click OK.**

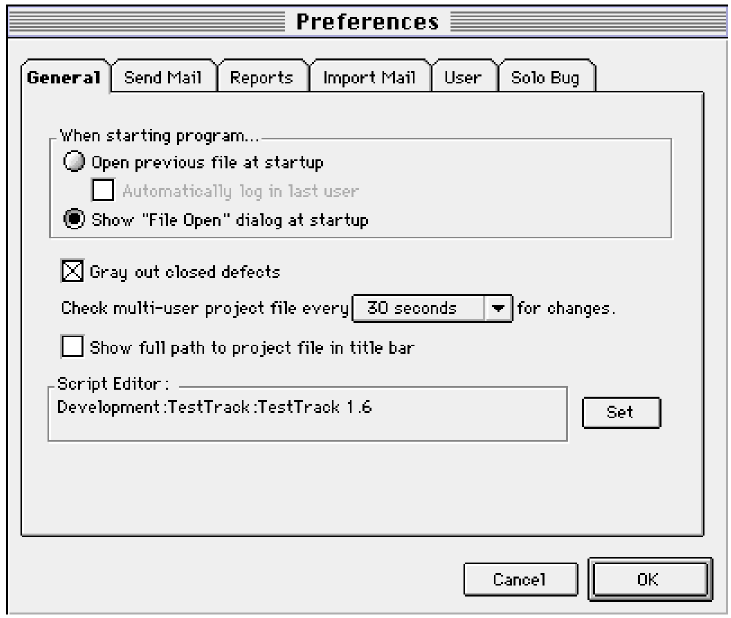
TestTrack activates the new password immediately.

# Setting Preferences

The Preferences dialog box lets you set up TestTrack to work the way you want it to:

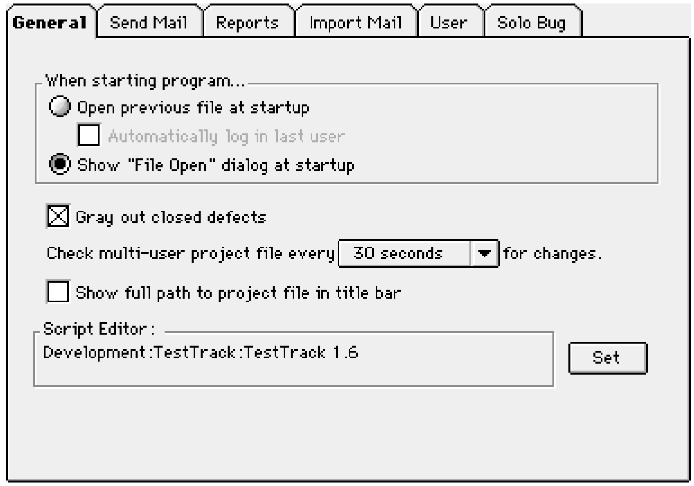
**1 Choose Preferences from the Edit menu.**

The Preferences dialog box appears.




**Note** In this chapter we describe how to set up the General, Report, and User options. The Solo Bug options are described in Chapter 12, “Working with Solo Bug.” The Send Mail and Import Mail options are described in Chapter 13, “Working with E-mail Notifications” and Chapter 14, “Working with E-mail Import.”

**2 Select the General preferences.**




The following describes the preferences:

**Startup**

Click **Open previous file at startup** to bypass the File Open dialog box and have TestTrack open the last Project file you used. Select the **Automatically log in last user** check box if you also want TestTrack to bypass the User Name and Password dialog box.

Click **Show "file open" dialog box at startup** to access the File Open dialog box so you can choose the project file.

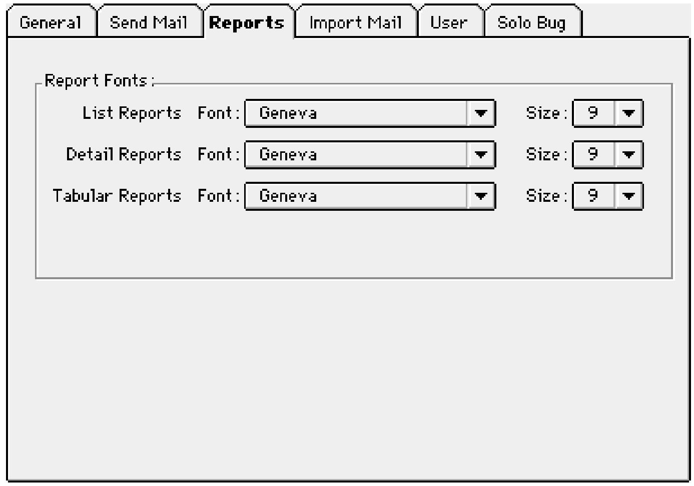
**Closed defects**

Click the check box if you want "Closed" defects grayed out in the Defect list box.

**Check multi-user project file**

Select the interval you want the multi-user project file updated. See "Checking a project file," later in this chapter, for more information.

**3 Click the Report tab and select the Report preferences.**



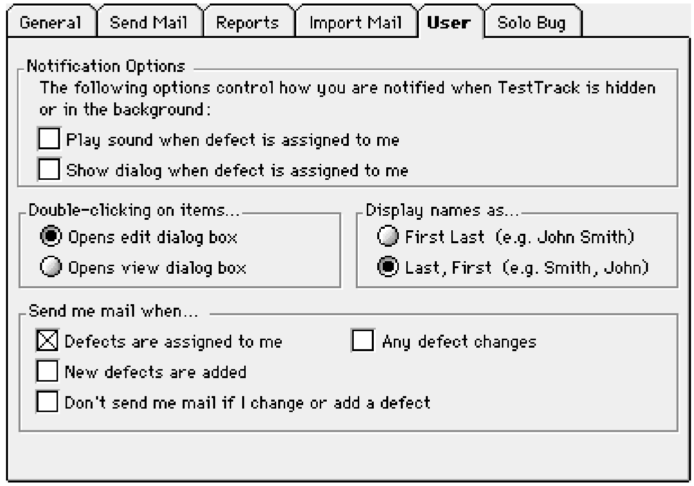

The following describes the preferences:

**List reports** Select the font you want to use for List reports.

**Detail reports** Select the font you want to use for Detail reports.

**Tabular reports** Select the font you want to use for Tabular reports. Distribution and Trend reports appear in tables and therefore are called Tabular reports.

**4 Click the User tab and select the User preferences.**




The following describes the preferences:

**Notification preferences**

Click the **Play sound when defect is assigned to me** check box if you want to be notified of new defects with a sound.

Click the **Show message when defect is assigned to me** check box if you want to be notified of new defects with a pop-up message.

**Double-clicking**

Click **Open edit dialog box** to open the Edit dialog box when you double-click an item in a list box.

Click **Open view dialog box** to open the View dialog box when you double-click an item in a list box.

**Display names as**

Click **First Last** to display user and customer names in first name, last name order.

Click **Last, First** to display user and customer names in last name, first name order.

**Send me mail when**

Click the **Defects are assigned to me** check box if you want to receive e-mail when defects are assigned to you.

Click the **Any defect changes** check box if you want to receive e-mail whenever a defect is edited.

Click the **New defects are added** check box if you want to receive e-mail when defects are added to the project file.

Click the **Don't send me mail if I change or add a defect** check box if you don't want TestTrack to send you e-mail when you are the user who edited or added the defect.

**5 Click OK.**

Your new preferences take effect.

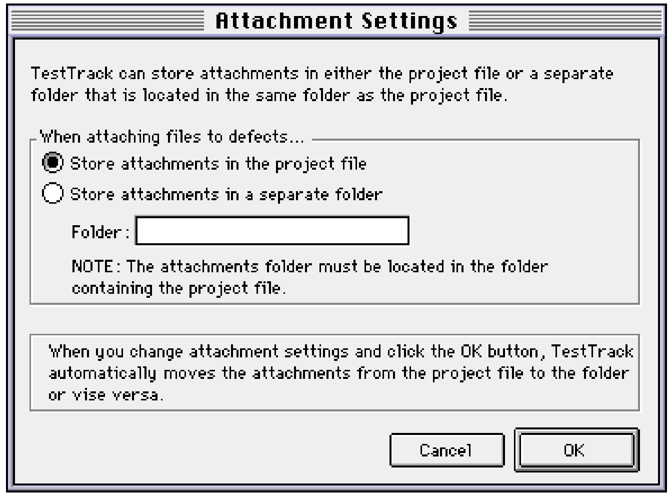
# Configuring attachment settings

TestTrack supports the ability to attach multiple data files to defects. These files are commonly called **binary file attachments**. Binary file attachments often contain information useful to fixing a defect or implementing a new feature. Since binary files can contain any type of information, they can be quite large. If they are stored in the project file, the project file also becomes quite large and takes much longer to backup and compact. TestTrack lets you decide whether to store binary attachments in the project file or in a sub-folder on your file server. You can change this setting at any time, however, it is best to establish it up front because changing it later can be time consuming. .

To configure the attachment settings:

**1 Choose Attachment Settings from Project Admin on the File menu.**

The Attachment Settings dialog box appears.




**2 Select whether you want attachments stored in the project file or in a separate folder.**

If you elect to store attachments in a separate folder, the folder must be a sub-folder of the folder containing the project file. For example, if the project file is stored in Power CD:TestTrack Data, the attachments may be stored in Power CD:TestTrack Data:Attachments.

This requirement exists so all TestTrack users can access the attachments sub-folder no matter what the server is called relative to their Macintosh or PC configuration.

**3 If you elected to store attachments in a separate folder, enter the name of the folder.**

The name can be up to 32 characters long.

**4 Click OK to save the settings.**

The Attachment Settings dialog box closes. At this point, if you are storing attachments in a separate folder and the folder does not exists, TestTrack will create it for you.

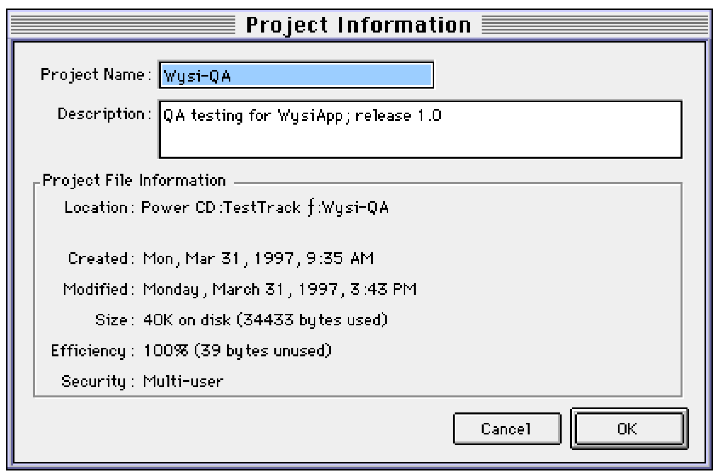
Next, if you have changed where to store the attachments, TestTrack either moves them from the project file to the sub-folder or vise-versa.

# Looking up project file information

To look up project file information:

**1 Choose Project Info from the File menu.**

The Project Information dialog box appears.




You may change the **Project Name** and **Description**. The Project Name defaults to the name of the project file. However, entering a new Project Name will not change the name of the project file.

The following describes the fields in the **Project File Information** group box:

**Location** This field shows where the project file is located on your hard drive. It also lists the name of the project file. You may find this information especially useful if you use the auto-open startup preference and have forgotten which file is open. See “Setting preferences,” previous, to review the Startup preference.

**Created** Shows the time the project file was created.

**Modified** Shows the last time the project file was updated.

**Size** Shows the size of the project file.

**Efficiency** When you delete an item in TestTrack, unused space is left in the project file. This space is used when you add new data, but sometimes many small spaces remain unused, which results in a larger-than-necessary file size.

The percentage in this field shows you how efficient the project file is. The higher the percentage, the better the efficiency. A very low percentage (15%) indicates a file with a lot of unused spaces in it. To fix this, choose **Compact Project** from the File menu. See “Compacting a project file,” next, for more information.

**Security** Shows whether a file is a single-user project file (no security), or a multi-user project file (security through user groups). See Chapter 5, “Working with User Groups,” to learn how to add security levels to a multi-user project file.

**2 Choose OK.**

The Project Information dialog box closes.

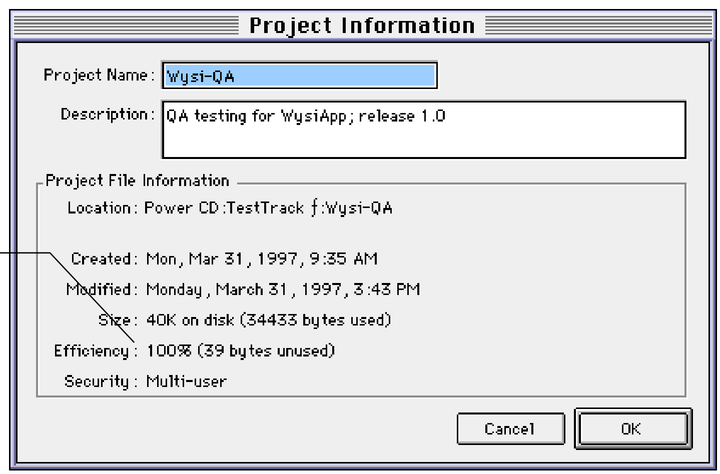
# Compacting a project file

When you delete an item in TestTrack, unused space is left in the project file. This space is used when you add new data, but sometimes many small spaces remain unused. After prolonged use, this results in an **inefficient** file that is larger than necessary.

To prevent this from happening, clean up the project file periodically using the **Compact Project** command. This command strips out the unused space in the project file and reduces its size.

To find out how efficient the project file is, open the Project Information dialog box and look at the percentage in the Efficiency field. The higher the percentage, the better the efficiency. A very low percentage (15%) indicates a file with a lot of unused space in it. See “Looking up project information,” previous, for information on the Project Information dialog box.

Compact project files with low Efficiency percentages (15% or lower).




To compact a project file:

**Choose Compact Project from the File menu.**

TestTrack compacts the project file. The Efficiency of the project file is returned to 100%.

**Note** You can't compact a project file while other users are logged in.

## Logging in another user

If you're the project administrator, there may be times when you need to log out the current user and log in another user in the same project file without closing the project file.

**Note** The **Log In User** command pertains only to multi-user project files.

To log in another user:

**1 Choose Log In User from the File menu.**

The Welcome to TestTrack dialog box appears.

**2 Enter a User Name and Password, and choose OK.**

The new user is now the current TestTrack user.

## Listing active users

To display a list of those users who currently have a multi-user project file open:

**1 Choose Show Active Users from the Activities menu.**

The Active Users dialog box appears.


**Note** This list pertains only to the project file you have open. Other user may have other project files open and will not appear in the list.

**2 Choose OK.**

The dialog box closes.

# Polling a project file

In a multi-user project file, TestTrack checks the project file at defined intervals for changes and new data. For example, it looks for new items, deleted items, and new defects assigned to the current user.

You set the interval that TestTrack checks the project file in the Preferences dialog box. TestTrack defaults to intervals of every 10 seconds, but you can set it from every 30 seconds to once an hour. See “Setting preferences,” earlier in this chapter, to review.

If you set the preferences for a long interval between checks, you can use the **Check Project File** command to check the project file for new data and update it immediately.

To check a project file:

**Choose Check Project File from the Activities menu.**

TestTrack looks for new data and updates the project file immediately.

**If you want to know more...**

You may wonder why you would want to set a long interval for the time TestTrack waits to check for new data.

Because TestTrack is not a client-server based program, it does not require a dedicated server to support multiple users on a network. Therefore, if you are on a slow network, or you have a lot of users on the network, checking the project file every 10 seconds may bog down TestTrack. In this case, it is best to increase the interval TestTrack waits to check for new data.

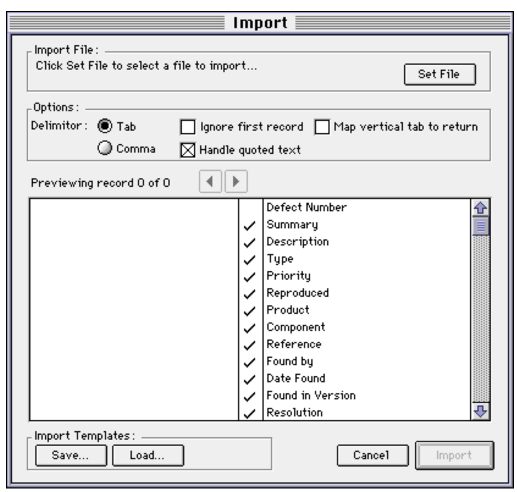
## Importing a file

TestTrack lets you import defects from comma- and tab-delimited files created in other database programs such as FileMaker Pro.

To import defects in a database file:

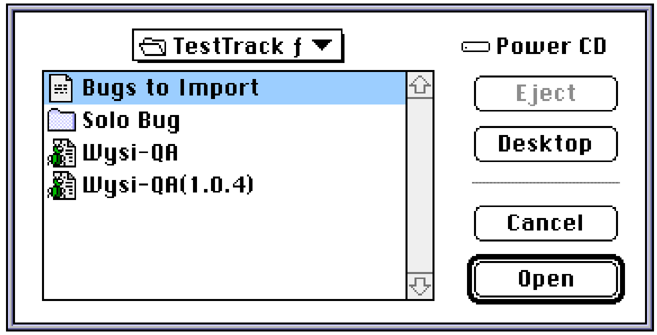
**1 Choose Import from Import on the File menu.**

The Import dialog box appears.



**2 Click Select File.**

The Open dialog box appears.

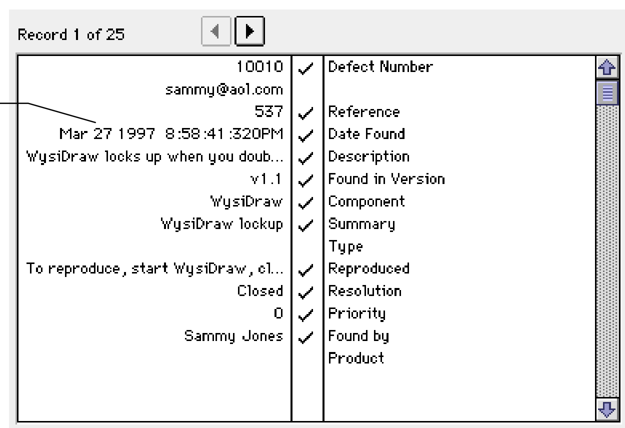



**3 Select the file you want to import.**

**4 Click Open.**

The file appears in the Import dialog box. The column on the left previews the fields as they appear in the file. Click the **Previous** and **Next** arrow buttons to step through each record.

This column lists the fields as they appear in the file you're importing.



**5 Select the Import options.**

The following describes the options:

**Delimitor**

This option tells TestTrack whether comma or tab characters are used to separate fields in a record.

**Ignore first record**

Often the first record in a file contains field names. This option tells TestTrack not to import the first record.

**Handle quoted text**

Often when you export a file from a database, quotes are inserted around the comma- and tab-delimited records; otherwise, a comma or tab appearing in a block of text (e.g., a description or note) would be misrepresented as a new record. This option tells TestTrack to ignore commas and tabs set off in quotes. If the program you used to export the records supports quoting fields, select this option.

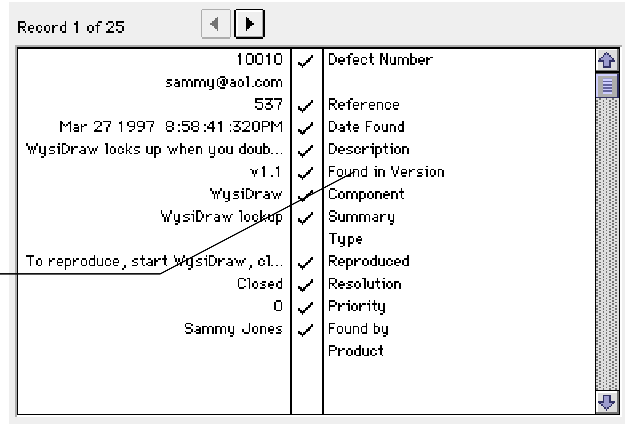
**Map vertical tab to return**

Some applications, such as FileMaker Pro, map carriage returns in multi-line fields to vertical tab characters (ASCII 11). This option tells TestTrack to map the vertical tab characters back to carriage returns to restore the proper formatting of mult-line fields.

**6 Match the TestTrack fields (in the right column) to the fields from the file you are importing (in the left column); or attach an Import Template.**

To match the fields, click and drag the TestTrack fields in the right column up or down to the proper position. If you can’t find an exact match for the fields you are importing, substitute its closest equivalent.

Match the TestTrack fields to the file you're importing by dragging them to a new position.

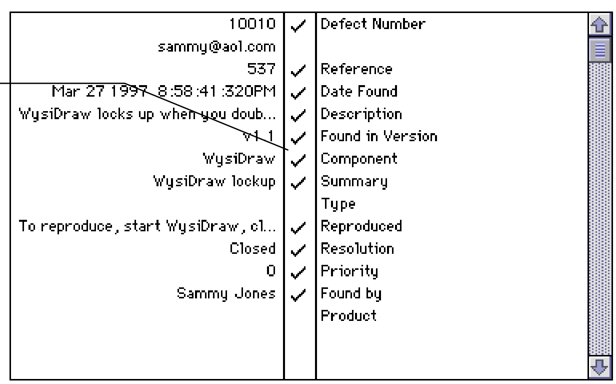



**Tip** If you've already created an **Import Template** to match the file's format, load it now, and skip this and the next step. See "Loading an Import Template," later in this chapter, if you need instructions.

**7 Select which fields to import.**

A checkmark beside a TestTrack field means TestTrack will import that field. To select a field to import, click in the middle column beside the field to make a checkmark appear. Clicking the checkmark again toggles it off.

Click in the center column to make a checkmark appear.




**Tip** If you are going to import a file using this layout again, save this format as an Import Template. See "Creating an Import Template," next, for instructions.

**8 Click Import.**

A progress window appears and lets you know the file is being imported.

# Creating an Import Template

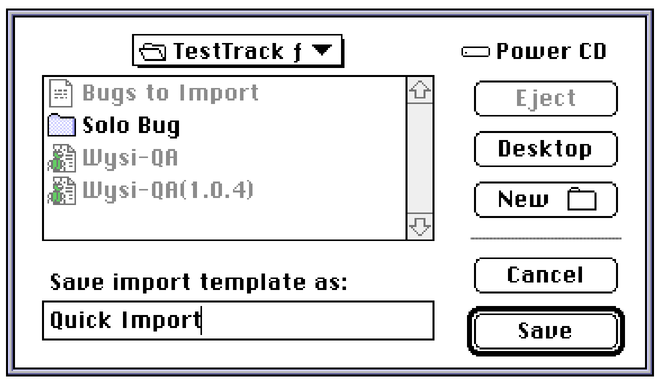
If you import files with the same field layout often, save the format as an Import Template.

To save a format as an Import Template:

**1 Map the fields as described in "Importing a file."**

**2 Click Save.**

The Save Import Template dialog box appears.




**3 Type a filename.**

**4 Click Save.**

You return to the Import dialog box.

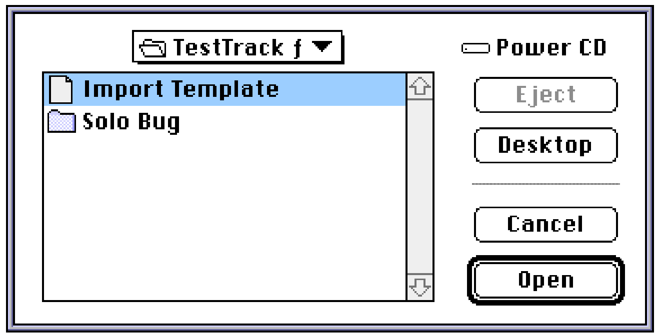
# Loading an Import Template

After you create an Import Template, you can select it at any time. See “Creating an Import Template” if you have not already created one.

To select an Import Template:

1 **Click Load.**

The Load Import Template dialog box appears.




2 **Select the Import Template.**

3 **Click Open.**

You return to the Import dialog box.

# Exporting a file

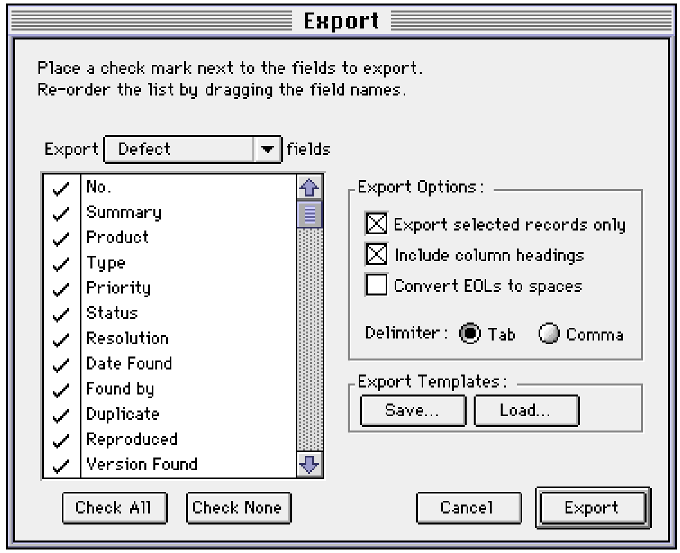
You can export records in a TestTrack project file as a comma- or tab-delimited text file.

To export a file:

**Note** If you want to export just a **few records** (not the entire file), select those records in the list window now. You can select records from any list window (e.g., Defects, Users, User Groups, Test Configs, etc.)

1 **Choose Export from the File menu.**

The Export dialog box appears.




2 **Select a record type from the Export pop-up menu.**


**Tip** If you've already created an **Export Template** to match the file's format, load it now, and skip this and the next step. See "Loading an Export Template," later in this chapter, if you need instructions.

**3 Select the fields you want to export.**


**4 Repeat steps 2 and 3 for all the record types.**

**5 Select any options from the Export Options group box.**

The following describes the options:

**Export selected records only** This option tells TestTrack to export only those records you selected in the top-most list window (not all the records in the project file).

**Include column headings** This option tells TestTrack to export the field names as the first record.

**Delimiter** This option tells TestTrack to insert either commas or tabs between records.

**Convert EOLs to spaces** This option tells TestTrack to convert end of lines (a carriage return or carriage return / line feed) to spaces. This simplifies importing multi-line fields (e.g., defect description) into programs that do not properly handle fields with embedded carriage returns (e.g., Microsoft Excel).

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**Tip** If you are going to export a file using this layout again, save this format as an Export Template. See “Creating an Export Template,” next, for instructions.

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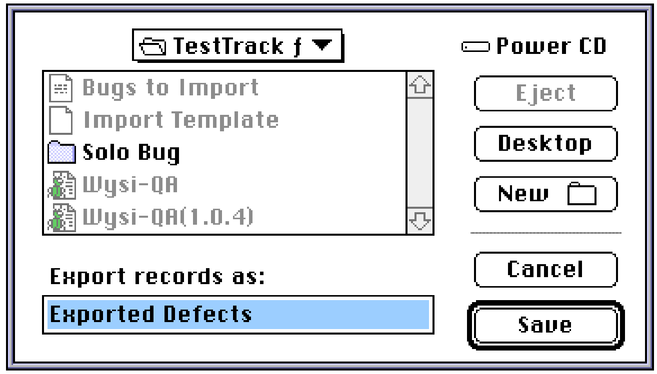
6 **Click Export.**

The Export file dialog box appears.




7 **Type a filename.**

8 **Click Save.**

A progress window appears and lets you know the file is being exported. You return to the Defects list window.

# Creating an Export Template

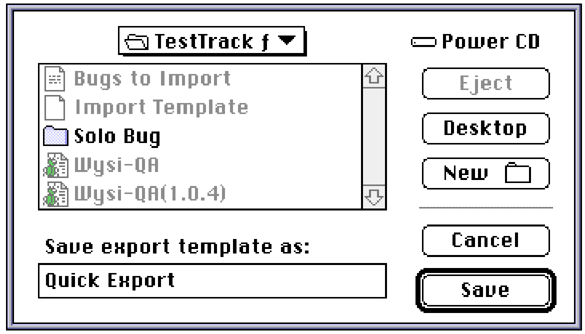
If you export files with the same field layout often, save the format as an Export Template.

To save a format as an Export Template:

1 **Set up the fields as described in "Exporting a file."**

**2 Click Save.**

The Save Export Template dialog box appears.




**3 Type a filename.**

**4 Click Save.**

You return to the Export dialog box.

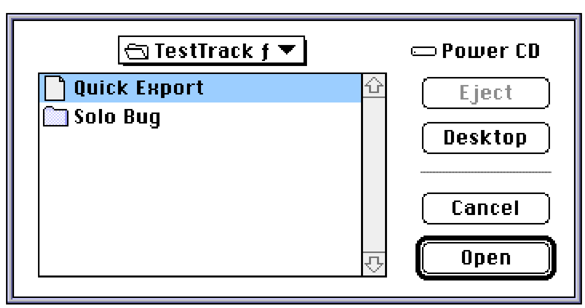
# Loading an Export Template

After you create an Export Template, you can select it at any time. See “Creating an Export Template” if you have not already created one.

To select an Export Template:

**1 Click Load.**

The Load Export Template dialog box appears.



2 **Select the Export Template.**

3 **Click Open.**

You return to the Export dialog box.

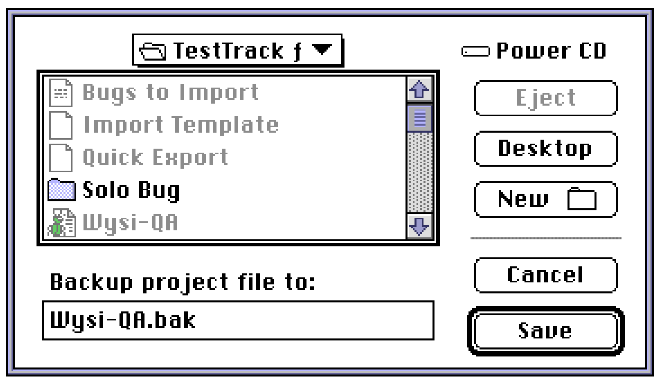
## Backing up your work

Since TestTrack is a multi-user program, many operating systems will not allow you to make a copy of the project file while someone is using it. TestTrack's Backup Project File command allows you to make a backup of your project file while it is in use.

To back up your project file:

1 **Choose Backup Project from the File menu.**

The Backup Project File dialog box appears.




2 **Type a filename.**

3 **Click Save.**

A progress window appears and lets you know the file is being backed up. You return to the Defects list window.

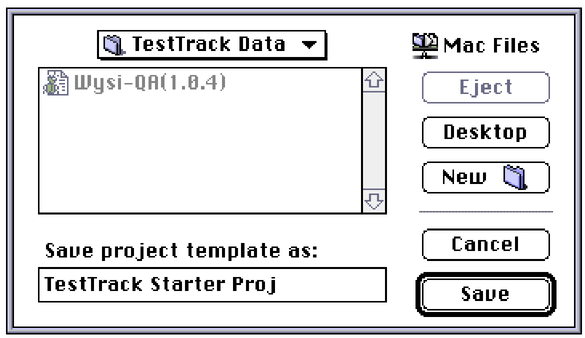
# Creating a project template

Configuring your project file's field values, options, setting security, user groups, users, reports, and e-mail notifications may be easy, but it is time consuming. TestTrack allows you to save all non-defect information in one project file to a new file that you can use as a starting point for your next project. This new file is called a **project template**. A project template is a standard TestTrack project file without any defects in it. Once created, you can open a project template and begin adding defects to it or you can create and use a copy of it.

To create a project template from the current project file:

1 **Choose Save Project Template from the File menu.**

The Save Project Template dialog box appears.




2 **Type a filename.**

3 **Click Save.**

A progress window appears and lets you know the file is being created. When the progress window disappears, your project template is ready for use.

# Making a single-user project file multi-user

When you first create a project file, you specify whether the file is single-user or multi-user. The Make Multi-User / Make Single-User command allows you to easily toggle the database from single- to multi-user and back.

To make a single-user project file multi-user:

1 **Select Make Multi-User from Project Admin on the File menu.**

The current project file is updated to support multiple users. A default administrator user called ‘admin’ is added to the project file along with no password. A user group called ‘administration’ with full security access rights is also added.

2 **Close the project file and re-open it.**

You will be required to log into the project file. Remember to enter the default user name of ‘admin’ and leave the password field empty.

To make a multi-user project file single-user:

1 **Select Make Single- from Project Admin on the File menu.**

The current project file is updated to support only a single user.

2 **Close the project file and re-open it.**

You will not be required to log into the project file and only one user will be able to access it at a time.

# Recovering a damaged project file

Sometimes, no matter how hard you try to prevent them, bad things happen to nice people. Fortunately, TestTrack provides a low-level database recovery feature to restore your data in the event your project file is corrupted by a server crash or some other software or hardware problem. Remember, a database recovery command is no substitute for a good backup routine. Catastrophic crashes can corrupt a project file beyond repair. However, if your database does become corrupt, recovery is always worth trying.

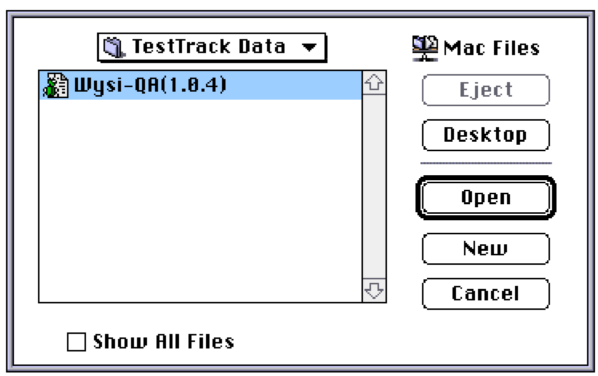
To recover a corrupt project file:

1 **Create a backup of your project file using your operating systems copy command.**

This should be your first step whenever you suspect a corrupt project file. Always try to create the backup copy on another hard disk drive to ensure you do not further damage the drive on which the project file resides.

2 **Choose Recover Project from Project Admin on the File menu.**

The Save Recovered Database dialog box appears.



**2 Type a filename for the recovered file.**

**3 Click Save.**

A progress window appears and lets you know the file is being created. When the progress window disappears, your project template is ready for use.

# 4 Working with Defects

## Contents



## Squash the bugs...

...and make way for **enhancements**! TestTrack 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 a trash can.

You can assign a **responsible person** to fix or verify a defect. In multi-user project files, TestTrack notifies a user as soon as he or she receives a defect assignment. Since communication is **automatic**, defects are not lost or forgotten about. You can also prioritize defects according to their severity, and move a defect through a **life cycle**.

This chapter explains how to work with defects. It starts with an explanation of a defect and how **defect actions** move a defect through a life cycle.

# About defects

A defect is a bug, enhancement, change request or any other product-related issue you wish to remember and resolve. Depending on your needs, you can configure complex tracking methods or simply use TestTrack as a bug “to-do” list. Whichever your choice, knowing a few of TestTrack’s capabilities will help start you on your way:

**Life Cycle** Most defects have a definite life cycle. A life cycle defines the path a defect takes from the initial bug report to a final resolution and consists of **states**. See “Understanding a defect’s life cycle” for more information.

**Defect Action** To move a defect from one state to another, you must assign a **defect action**. See “Taking a look at defect actions” for more information.

**Deferred Defect Numbering** TestTrack can delay numbering defects until you determine they belong in the database. See “Deferred defect numbering” for more information. .

**Communication** In a multi-user file, any time you assign a defect to a responsible person, TestTrack automatically notifies that user of his or her new responsibility. See “Communicating with others” for more information.

**Filters** A filter helps you manage the data listed in the Defects list window. A filter “filters out” unwanted defects and lets those you want to see pass through to the list window. See “Filtering out unwanted defects” for more information.

# Understanding a defect’s life cycle

A life cycle defines the path a defect takes from initial reporting to a resolution and consists of **states**. In TestTrack, a defect is always in one of the following six **states**:

**Open** A defect in the Open state has been added to the project file, but it has not been fixed or closed.

**Fixed** A defect in the Fixed state has been fixed or resolved and is pending verification.

**Verify Passed** A defect in the Verify Passed state has had its resolution successfully verified and the defect is now closed.

**Verify Failed** A defect in the Verify Failed state did not pass verification. The defect must be fixed again and returns to the Open state.

**Closed** There was no reason to fix and verify the defect. It may not have been a defect, or it may be a requested feature you do not plan to add to the product.

**Re-opened** The defect has resurfaced after it was resolved and verified or closed.

# Taking a look at defect actions

Defects must progress through life cycle states before they are “resolved.” To move a defect from one state to another, you must assign a **defect action**.

You can assign the following defect actions to a defect:

**Assign** Assigns a responsible person to fix a defect.

**Estimate** Allows you to estimate the time needed to fix a defect or implement a new feature.

**Fix** Moves the defect into the Fixed state. When you use this command, you can also **Save & Assign** the defect to a new responsible person for verification.

**Verify** Lets you choose whether the defect’s resolution passes or fails. If you choose Fail, you can also **Save & Assign** the defect to a new responsible person to fix.

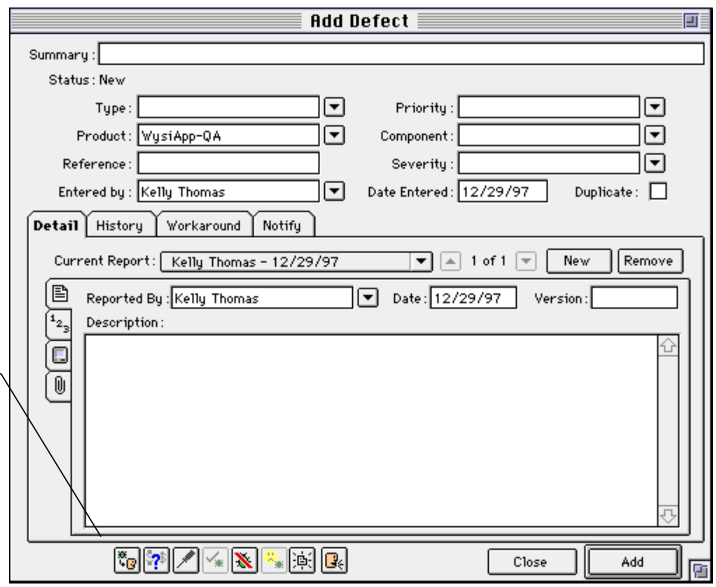
**Close** Overrides the life cycle and closes out a defect. You can choose this command any time in a defect’s life cycle. This command is ideal if you discover a reported defect is not an actual defect.

**Reopen** Re-opens a defect that has resurfaced after it was verified or closed.

**Release** Automatically generates a text file of release notes.

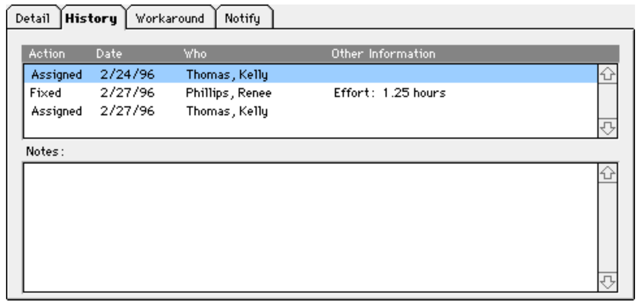
**Comments** Allows you to add special comments to any defect.

Defect actions allow you to move a defect from one state in its life cycle to another. You can assign a defect to a responsible person to fix, and TestTrack automatically notifies that user of his or her new responsibility. Likewise, if another user assigns a defect to you, you automatically receive a message telling you so. After you fix the defect, you can assign it to another lucky user for verification.

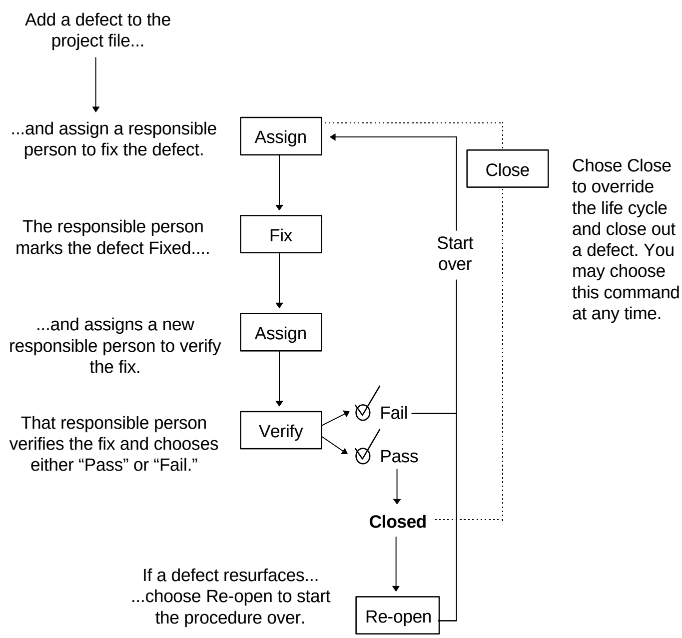



The defect action buttons let you move a defect through its life cycle.

All the defect actions you perform on a defect become part of the defect's history. You can view the defect's history on the History Tab located on the Add, View, and Edit dialog boxes. If you need to, you can edit or delete defect actions from the History tab. See "Changing a defect action" or "Deleting a defect action," later in this chapter, for instructions.




The following graphic shows how you can assign **defect actions** to move a defect through its life cycle:



# Deferred defect numbering

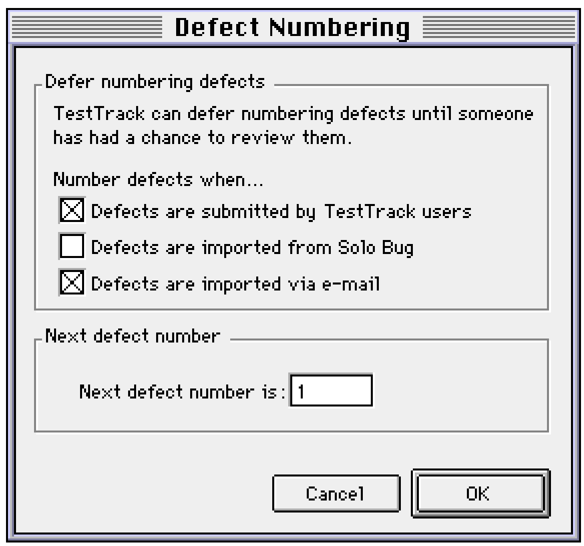
During product testing, bug reports are coming in rapidly from a variety of sources. Many are new bugs or feature requests that you need to track, some are neither unique nor issues you need to track in the project file. TestTrack provides the ability to store new defects in the project file, but not number them until they have been confirmed as unique defects. This feature is called **deferred defect numbering**.

## Configuring deferred defect numbering

To set up defect numbering:

**1 Select Defect Numbering from Project Admin on the File menu.**

The Defect Numbering dialog box appears.



**2 Specify when defect numbers should be assigned to defects.**

The following describes the options:

**Submitted by TestTrack Users** A defect number is assigned whenever a defect is added by a TestTrack user.

**Imported from Solo Bug** A defect number is assigned to defects imported as Solo Bug files; either automatically, using the Load Solo Bug Files command, or dropped on the defect list window.

**Imported via e-mail** A defect number is assigned to defects imported from an e-mail account. This also applies to e-mail text files that are imported by dropping them on the defect list window.

**3 Optionally specify the next defect number to use.**

You can set the next defect number to any value greater than the largest defect number used in the project file.

**4 Click OK to save the settings.**

The Defect Numbering dialog box closes and your settings are saved to the project file.

## Using deferred defect numbering

When deferred defect numbering is active, new defects appear in the defect list with a dash in the column where the defect number normally appears. They are called **unnumbered defects**. When sorting the defect list by defect number, unnumbered defects are treated as if they were numbered lower than any other defect. .

You can perform any action on an unnumbered defect that you can perform on a numbered defect. Normally, you will periodically review the unnumbered defects and take one of the following actions: merge them with  existing defects, delete them, or assign them unique defect numbers.

The following describes each action:

**Merging Defects**

If an unnumbered defect is not unique (is a duplicate), you should merge it with the existing identical defect. See "Merging defects," later in this chapter, to learn how to merge two or more defects.

**Deleting Defects**

If an unnumbered defect does not belong in the project file, you should delete it. Perhaps the defect does not relate to any of the products or projects tracked in the project file. Or, maybe it was unsolicited e-mail offer that found its way to your technical support e-mail account. See "Deleting a defect," later in this chapter, to learn how to delete a defect.

**Assign Defect Numbers**

If the unnumbered defect is unique and belongs in the project file, you can assign the next available defect number to it. See "Assigning defect numbers," next, to learn how to number a defect.

## Assigning defect numbers

To assign a number to an unnumbered defect:

**1 Select the defect you want to number from the Defects list window.**

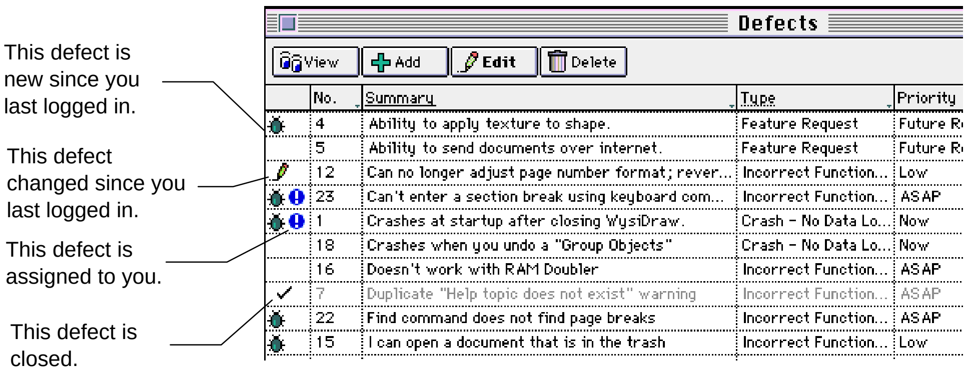
To select a range of defects, **click** the first item in the range, then **shift-click** the last item. To select multiple items not in a range, **command-click** each item.

**2. Select Assign Defect Numbers from Defect Actions on the Activities menu.**

The defect is assigned the next defect number.

# Communicating with others

In multi-user project files, when you assign a defect to a responsible person, TestTrack automatically notifies that user of his or her new responsibility. Likewise, if another user assigns a defect to you, you automatically receive a message telling you so. **Defect indicators** appear in the first column of the Defects list window and point out new defects, closed defects, and defects assigned to you:

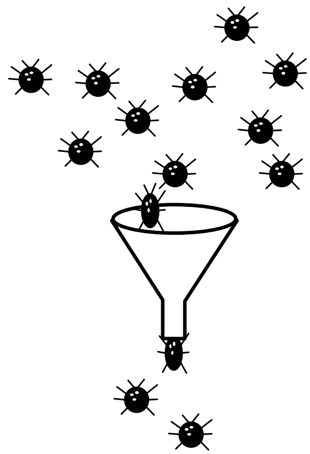



For more information on defect indicators, see “Looking at defect indicators” in Chapter 2, “Learning the Basics.”

**Note** Notice that the closed defect is **grayed out**. You can set this preference in the Preference dialog box. See “Setting preferences” in Chapter 3, “Working with Project Files.”

## Filtering out unwanted defects

As you and others add more and more defects to a project file, it gets harder to find specific defects in the Defects list window "at a glance." To get TestTrack to list only those defects you want to see, use a **filter**.



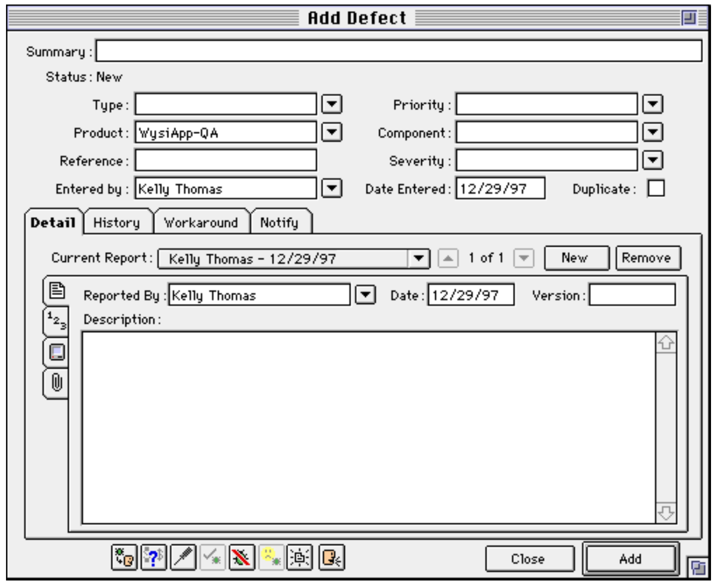
You can create a filter to meet every need you may have. You can also share the filters others have created. The combination and content of filters you can create is limitless. To learn how to create filters, see Chapter 7, "Working with Filters."

# Adding a defect

To add a defect:

1 **Choose Defect from the Create menu, or click the Add button on the Defects list window.**

The Add Defect dialog box appears.




2. **Enter the information in the top portion of the dialog box.**

The following describes each field:

**Summary** Enter a summary for the defect You may use up to 255 characters.

**Status** Display-only field. Displays the current state of the defect and whether it's assigned.

**Type** Select the defect's type from the pop-up menu. TestTrack comes with default values. You may use these, or you may customize them. See "Configuring field values" in Chapter 3, "Working with Project Files," if you want to change or add values.

**Priority** Select the defect's priority from the pop-up menu. TestTrack comes with default values. You may use these, or you may customize them. See "Configuring field values" in Chapter 3, "Working with Project Files," if you want to change or add values.

**Product** Select the name of the product from the pop-up menu. Since these values are specific to your company, TestTrack does not come with default values. However, TestTrack adds the name of your project file to the list to get you started. To add a product name to the pop-up menu, see "Configuring field values" in Chapter 3, "Working with Project Files."

**Component** Select the name of the component from the pop-up menu. Since these field values are specific to your project, TestTrack does not come with default component values. To add a component name to the pop-up menu, see "Configuring field values" in Chapter 3, "Working with Project Files."

**Reference** Enter any reference number pertinent to the defect.

**Severity** Select the defect's severity from the pop-up menu. TestTrack comes with default values. You may use these, or you may customize them. See "Configuring field values" in Chapter 3, "Working with Project Files," if you want to change or add values.

**Entered by** Defaults to the current user; however, you may select any user from the pop-up menu.

**Date Entered** Defaults to the current date; however, you may enter a different date.

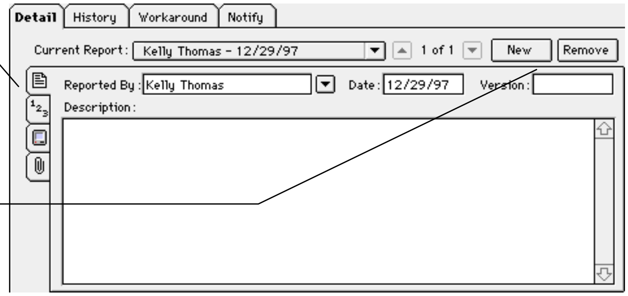
**3 Enter the information on the Detail tab.**

The Current Report field defaults to the current user; however, you may select any user from the pop-up menu. Notice the buttons in the top-right corner of the Detail tab. These buttons allow you to add **multiple reports** of the same defect. You learn how to use this functionality in the next topic, "Adding multiple reports of a defect."

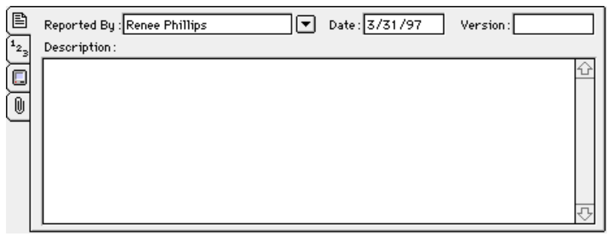
The Detail tab is made up of four **mini tabs**.

A **mini tab** is a small, horizontally oriented tab. Icons illustrate the functionality.

These buttons allow you to enter multiple reports of the same incidence. Read about this in the next topic.




**4 Enter the information on the Reported by mini tab.**




The following describes each field:

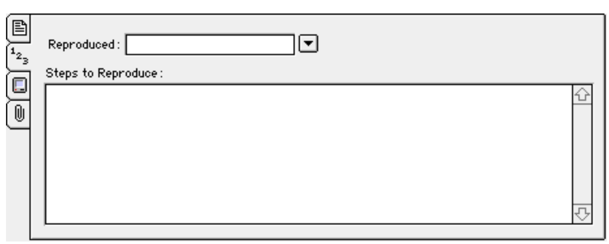
**Reported by** Defaults to the current user; however, you may select any user from the pop-up menu.

**Date** This field defaults to the current date. You may enter a new date if you wish.

**Version** Enter the version of the software containing the defect.

**Description** Enter a detailed description of the defect.

**5 Enter the information on the Steps to Reproduce mini tab.**



The following describes each field:

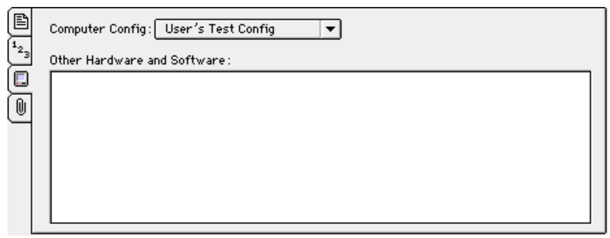
**Reproduced**

Select a reproducible level from the pop-up menu. TestTrack comes with default values. You may use these, or you may customize them. See “Configuring field values” in Chapter 3, “Working with Project Files,” if you want to change or add values.

**Steps to Reproduce**

Enter the detailed steps to reproduce the problem. Be as specific as possible.

**6 Enter the information on the User’s Computer Configuration mini tab.**




The following describes each field:

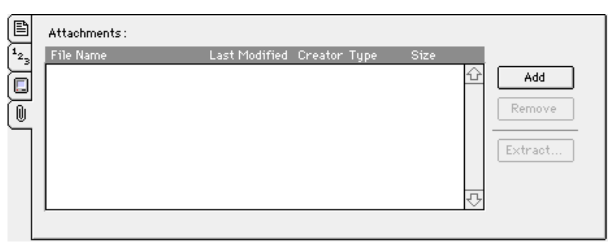
**Computer Config**

Defaults to the current user’s test configuration; however, you may select any configuration from the pop-up menu. If you need to add a new configuration, see “Adding a test configuration” in Chapter 8, “Working with Configurations.”

**Other Hardware and Software**

Enter information about any other hardware and software involved with the problem.

**7 Attach a file to the defect using the Attachments mini tab.**



To attach a file:

1. **Click Attach**. The Attach File dialog box appears.
2. **Find the file and select it**.
3. **Click Attach**. The file appears in the Attachments list box on the Attach File dialog box.

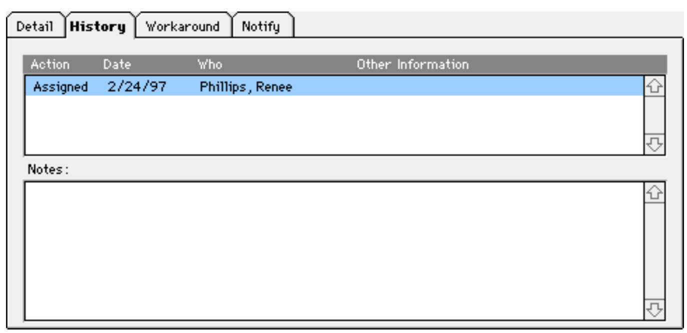
See “Attaching a file to a defect,” later in this chapter, for details and other important information.

**Where to go next...**

At this time, you can assign a **responsible person** to fix the defect. Click the **Assign** button located at the bottom of the dialog box. The Assign Defect dialog box appears. See “Assigning a responsible person,” later in this chapter, for instructions.

**8 Click the History tab.**

This tab shows you a complete history of all the defect actions. This box remains blank until you assign a defect action. If you **just assigned** a responsible person to fix the defect, the action appears in the list box.



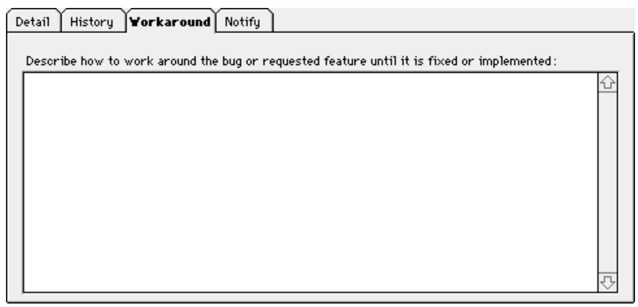
**Where to go next...**

If you made a mistake in the defect action dialog box, or you want to add more information, you can edit the defect action from the History tab. See “Changing a defect action,” later in this chapter, for instructions.

You can also delete the defect action. See “Deleting a defect action,” later in this chapter, for instructions.

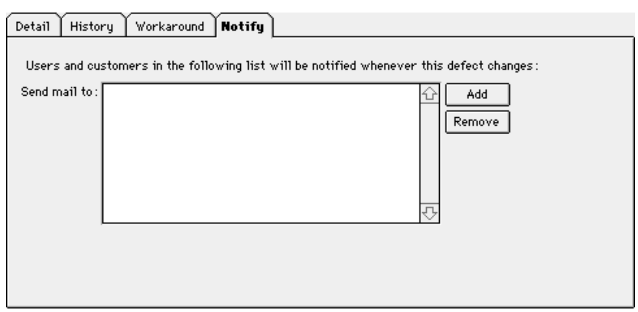
**9 Click the Workaround tab.**

Enter a workaround fix for the problem.



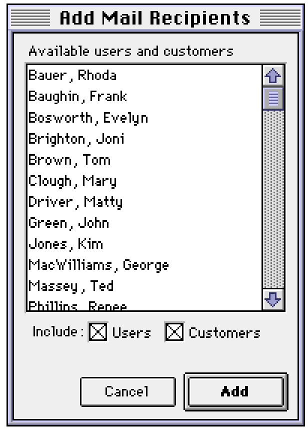

**10 Click the Notify tab.**

This tab allows you to define a list of users and customers who will receive e-mail whenever the defect changes.



To add users to the notification list:

1. **Click Add**. The Add Mail Recipients dialog box appears.




2. **Click the Users and/or Customers check boxes** to control who appears in the list.
3. **Highlight** the names of the users and / or customers who you want to notify of changes to this defect.
4. **Click Add**. The dialog box disappears and the selected user and customer names are added to the **Send mail to** list box

**11 Click the Add button.**

The defect is added to the project file. The cursor returns to the Summary field and you are ready to add another defect. TestTrack uses sticky fields to retain data and save you time when you are entering similar defects.

**If you want to know more...**

If you are in the process of adding old bug reports to TestTrack, you can enter their complete histories (e.g., who found the defect, who fixed it and when, who verified it, etc.) without ever leaving the Add Defect dialog box. The following explains:

1. From the Add Defect dialog box, enter the Summary, Type, and Priority.

2. Enter the information on the **Detail** tab and the **Test Config** tab.

3. Click the **History** tab and choose the **defect action** that best describes the first state in the defect's history. For example, choose **Assign**. The Assign Defect dialog box appears. Enter the information and choose OK.

4. Continue entering the defect's history (Fix, Verify Passed/Fail, etc.). If you make a mistake on an item, select the item and choose **Edit Action** from the Edit menu. See "Changing a defect action," later in this chapter, for details.

# Adding multiple reports of a defect

Often the same defect is reported by several users, customers, or beta sites. To help you avoid unnecessary duplicates in your database, you can add the defect once and add all other reports of the defect as subreports.

To add a multiple report of a defect:

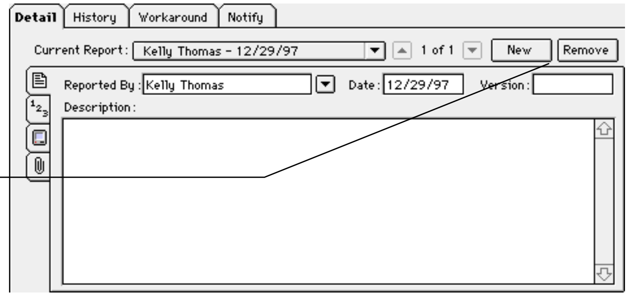
1 **Select the defect you want to add an additional report to.**

If you are currently adding the main defect **skip** to step 3.

2 **Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

The Edit Defect dialog box appears.

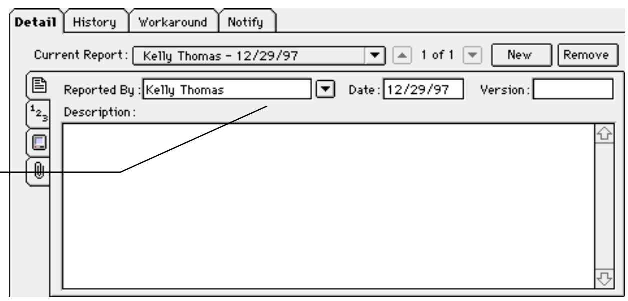
**3 On the Detail tab, click New.**




Click here to enter multiple reports of the same defect.

The Current Report field reflects the name and date of the defect visible in the mini tabs. It clears to "Unknown" until you select a name in the Reported by field (on the mini tab).

**4 Select a user from the pop-up menu on the Reported by mini tab.**




Select a user for the new report.

**5 Enter a description and any other pertinent information on the mini tabs.**

**6 Click OK.**

# Duplicating a defect

When you duplicate a defect, TestTrack makes an exact copy of the defect and assigns it a new defect number. You can then modify it in any way.

To duplicate a defect:

**1 Select the defect you want to duplicate from the Defects list window.**

**2 Choose Duplicate Defects from the Edit menu.**

TestTrack duplicates the defect, assigns it a new defect number, and places it at the end of the list.

# Attaching a file to a defect

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

**Tip** You can attach as many files as you need to a defect. However, to save you time, you may want to zip all the files together and attach the zipped file.

To attach a file to a defect:

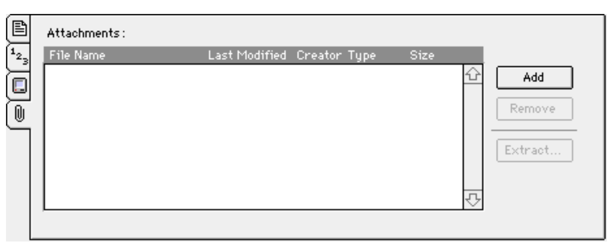
**1 Select the defect you want to attach a file to.**

If you are currently adding or editing the defect **skip** to step 3.

**2 Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

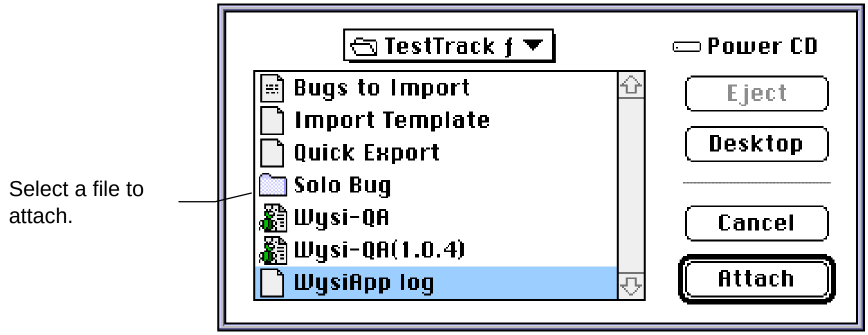
The Edit Defect dialog box appears.

**3 On the Detail tab, click the Attachments mini tab.**



**4 Click the Attach button.**

The Attach File dialog box appears.




**5 Find the file you want to attach and select it.**

**6 Click the Attach button.**

The file appears in the Attachments list box on the Attach File dialog box

**7 Click OK.**

# Extracting an attached file from a defect

Extract allows you to save a copy of an attachment to your hard disk drive. For example, if a customer attaches a corrupted data file to a defect, you can extract the file to a folder on your hard drive. You can then access the file to debug the problem.

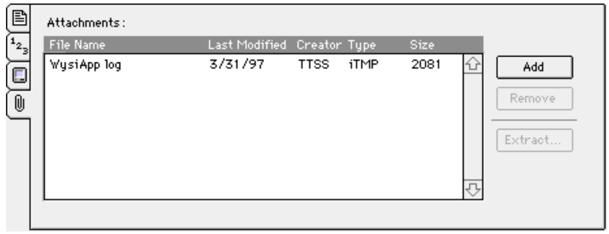
To extract an attached file from a defect:

**1 Select the defect you want to extract an attached file from.**

**2 Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

The Edit Defect dialog box appears.

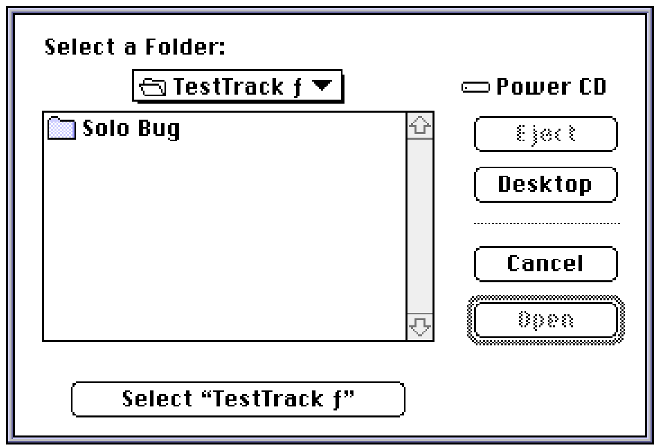
**3 On the Detail tab, click the Attachments mini tab.**




**4 Select the attached file.**

**5 Click the Extract button.**

The Save Extracted File As dialog box appears.




**6 Make sure the correct folder is selected, and check the file name.**

You can keep the assigned folder and file name, or you can select a new folder and type a new filename.

**7 Click the Save button.**

TestTrack copies the attached file to the folder you selected. You can now use the file.

# Viewing an attached file

TestTrack allows you to view text and graphics files without first extracting them. Specifically, you can view text files with a type of ‘TEXT’ and graphics files with a type of ‘PICT’.

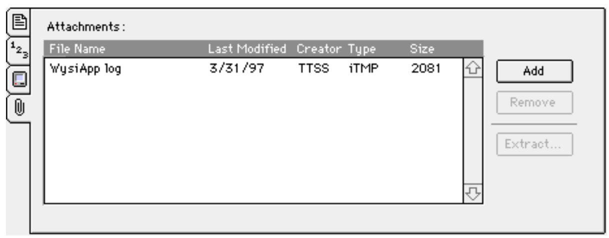
To view an attached file from a defect:

1 **Select the defect you want to view an attached file from.**

2 **Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

The Edit Defect dialog box appears.

3 **On the Detail tab, click the Attachments mini tab.**




4 **Select the attached file.**

You can select either text files (type ‘TEXT’) or graphics files (type ‘PICT’).

5 **Select View Attachment from the Edit menu.**

The text file or graphics file is displayed.

# Deleting an attached file from a defect

To remove an attached file from a defect:

**1 Select the defect you want to remove an attached file from.**

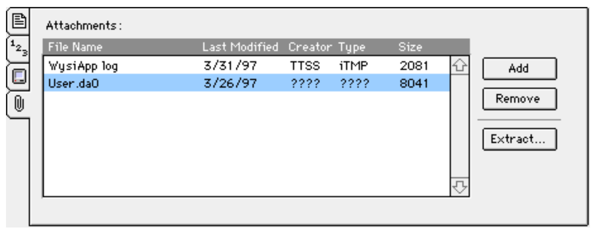
If you are on the Edit Defect dialog box, **skip** to step 3.

**2 Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

The Edit Defect dialog box appears.

**3 On the Detail tab, click the Attachments mini tab.**

All the attached files appear in the list box.




**4 Select the file you want to delete.**

**5 Click the Remove button.**

The attached file is removed.

# Merging defects

To eliminate duplicate defects, you can merge two or more defects into one:

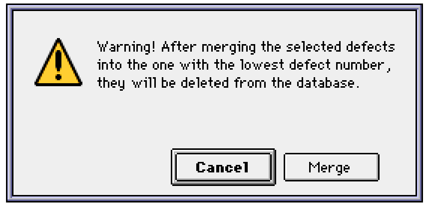
To merge duplicate defects:

**1 Select the defects you want to merge from the Defects list window.**

To select a range of defects, **click** the first item in the range, then **shift-click** the last item. To select multiple items not in a range, **command-click** each item.

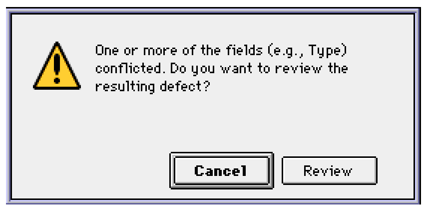
**2 Choose Merge Defects from the Edit menu.**

A warning box appears.

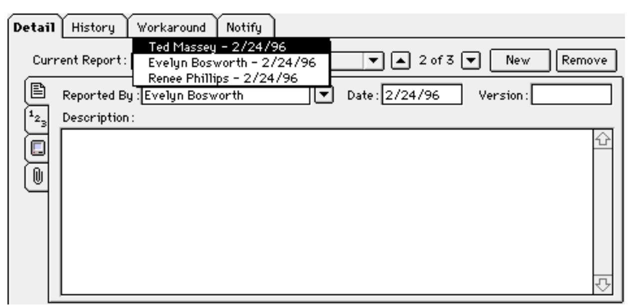



**3 Choose OK.**

If the defects differ in type, priority, severity, reference, or duplicate, a message appears after the merge so you can review the resulting defect. The other defects are deleted.




**Note** TestTrack merges the selected defects into one defect. The defect assumes the lowest defect number and the summary, status, product, component, reference, and dates from that defect. The defect assumes the "worst case" type, priority, and severity. The information on all the tabs is retained as **multiples reports** of the same defect. For example, if you merged 3 defects, the Detail tab will show 3 reports, which you can select from the Current Report pop-up menu.



# Viewing a defect

To view a defect:

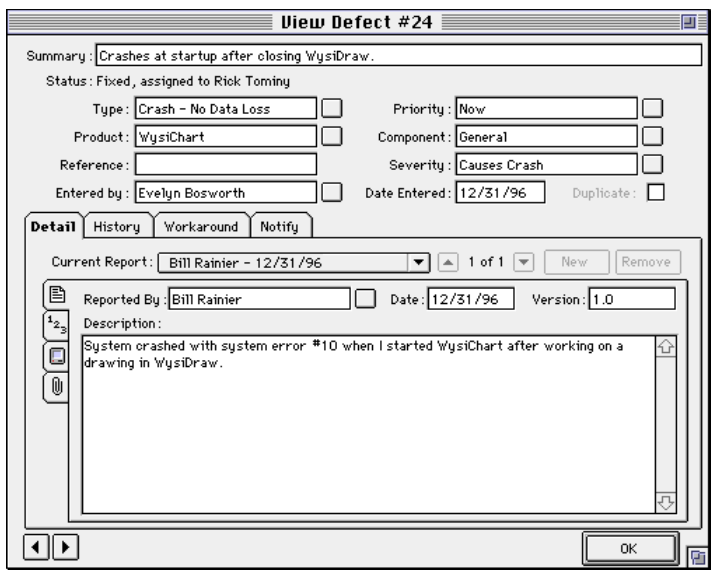
**1** **Select the defect you want to view from the Defects list window.**

To select a range of defects, **click** the first item in the range, then **shift-click** the last item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **View** button is bold, **double-click** the defect to select it and open the View Defect dialog box at the same time. You can set this preference in the Preferences dialog box.

**2** **Choose View Defect from the Edit menu, or click the View button on the Defects list window.**

The View Defect dialog box appears.




**Note** When viewing or editing a defect, **next** and **previous arrows** appear at the bottom of the dialog box. Click the arrows to page through the defects.

**3 Choose OK.**

The View Defect dialog box closes.

**If you want to know more...**

Use the **History tab** to view the complete history of a defect. The History tab lists every **defect action** performed on the defect.

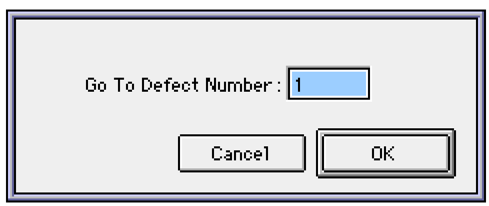
If you need to edit a defect action, see “Changing a defect action,” later in this chapter, for details.

# Going to a specific defect

To go quickly to a specific defect:

**1 Choose Go To Defect Number from the Edit menu.**

The Go To Defect Number dialog box appears.




**2 Enter the defect number.**

**3 Click OK.**

The Edit Defect dialog box for that defect appears.

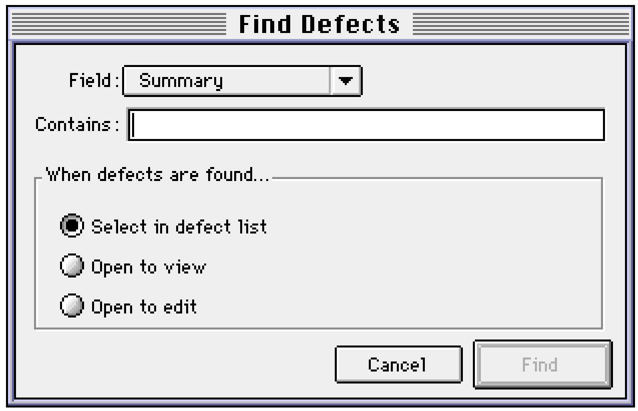
# Finding defects

The Find Defects dialog box lets you search the Summary or Description fields for text that you specify.

To use the Find Defects command:

1 **Choose Find Defects from the Edit menu, or click the Find button located on the toolbar.**

The Find Defects dialog box appears.




2 **Choose either Summary or Description from the Field pop-up menu.**

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

4 **Select a radio button in the When Defects are Found group box.**

Your choices are as follows:

**Select in defect list** TestTrack selects the defects in the Defects list window.

**Open to view** TestTrack selects the defects and opens them in the View dialog box.

**Open to edit** TestTrack selects the defects and opens them in the Edit dialog box.

**5 Choose Find.**

TestTrack searches for the text you entered in the Contains field.

# Changing a defect

To change a defect:

**1 Select the defect you want to change from the Defects list window.**

To select a range of defects, **click** the first item in the range, then **shift-click** the last item. To select multiple items not in a range, **command-click** each item.

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**Tip** If the **Edit** button is bold, **double-click** the defect to select it and open the Edit Defect dialog box at the same time. You can set this preference in the Preferences dialog box. You only can double-click single items.

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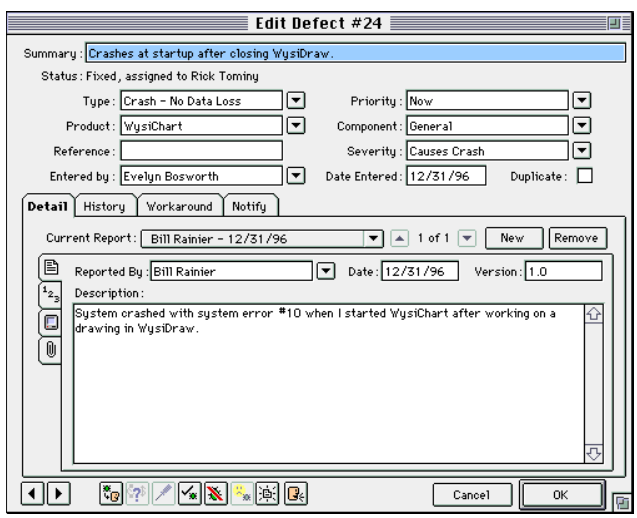
**2 Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

The Edit Defect dialog box appears.



**Note** When viewing or editing a defect, **next** and **previous arrows** appear at the bottom of the dialog box. Click the arrows to page through the defects.

**3 Make any changes.**

If another user is editing the defect, a **Read-only** icon appears next to the **Cancel** button. You can't edit the defect until the other user is finished and the **Read-only** icon disappears. Click on the icon to see who is editing the defect.

**Click on the icon** to see who is editing the defect.


**Where to go next...**

You can choose a defect action from the bottom of the dialog box. See "Assigning a responsible person," "Fixing a defect," "Verifying a defect," "Re-opening a defect," or "Closing a defect."

**4 Choose OK.**

The Edit Defect dialog box closes. Your changes have been made.

# Deleting a defect

To delete a defect:

**1 Select the defect you want to delete from the Defects list window.**

To select a range of defects, **click** the first item in the range, then **shift-click** the last item. To select multiple items not in a range, **command-click** each item.

**2 Choose Delete Defect from the Edit menu, or click the Delete button on the Defects list window.**

The defect is removed from the Defects list window.

# Deleting a report of a defect from a list of multiples

To remove a report of a defect from the list of multiples:

**1 Select the defect you want to remove one of the additional reports from.**

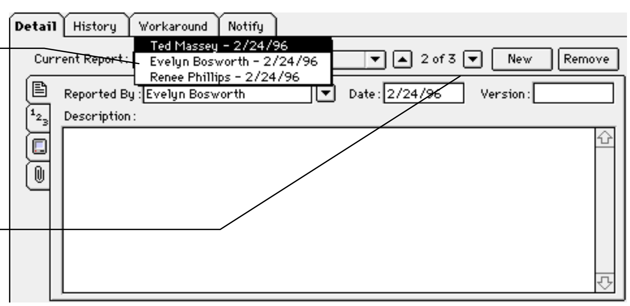
If you are on the Edit Defect dialog box, **skip** to step 3.

**2 Choose Edit Defect from the Edit menu, or click the Edit button on the Defects list window.**

The Edit Defect dialog box appears.

**3 On the Detail tab, select the report you want to remove.**

Select the user's report you want to remove.




You can also use these arrows to page through the reports.

**4 Click the Remove button.**

The report is removed from the list.

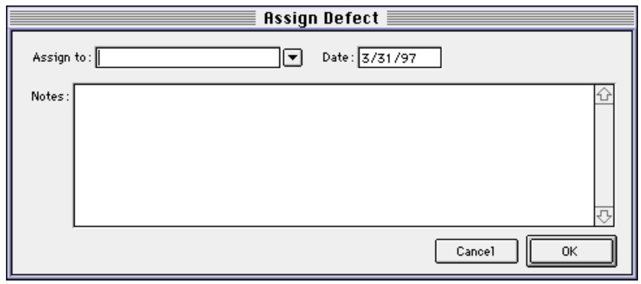
**5 Click OK.**

# Assigning a responsible person

To assign a responsible person to fix or verify a defect:

**1 Select the defect from the Defects list window and choose Assign from Defect Actions on the Activities menu; or click the Assign button on the Add or Edit Defect dialog box.**

The Assign Defect dialog box appears.




**2 Select a responsible person from the Assign To pop-up menu.**

If you need to add a new user to the menu, choose **New User** from the pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

**3 Check the date, and enter any notes pertaining to the defect.**

The date defaults to the current date, but you may enter another date. The notes are recorded with the history of the defect. It’s always best to specify too much detail, rather than too little!

**4 Choose OK.**

You return to the Add or Edit Defect dialog box. Choose **Add** in the Add Defect dialog box; or **OK** in the Edit Defect dialog box.

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**Note** If you are working with a **multi-user** project file, TestTrack notifies the user of the new defect assigned to him or her.

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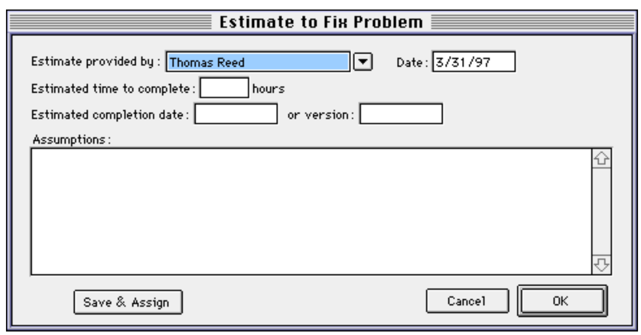
# Estimating the time needed to fix a defect

To enter an estimate of the time needed to fix a defect:

**1 Select the defect from the Defects list window and choose Estimate from Defect Actions on the Activities menu; or click the Estimate button on the Add or Edit Defect dialog box.**

The Estimate Defect dialog box appears.




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

If you need to add a new user to the menu, choose **New User** from the pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

**3 Check the date.**

The date defaults to the current date, but you may enter another date.

**4 Enter the Estimated time to complete and the Estimated completion date or version.**

The date defaults to the current date, but you may enter another date.

**5 Enter any notes in the Assumptions box.**

The notes are recorded with the history of the defect. It's always best to specify too much detail, rather than too little.

**6 Choose OK.**

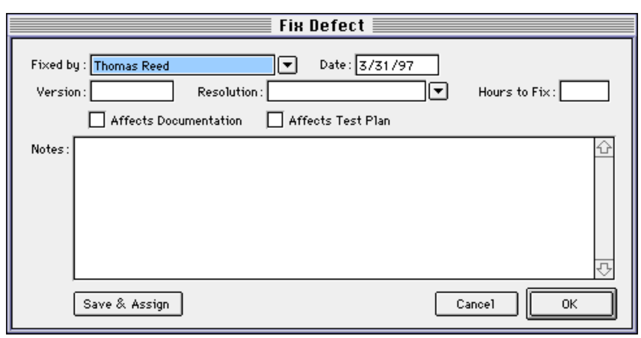
You return to the Add or Edit Defect dialog box. Choose **Add** in the Add Defect dialog box; or **OK** in the Edit Defect dialog box.

# Fixing a defect

To indicate a defect is fixed:

**1 Select the defect from the Defects list window and choose Fix from Defect Actions on the Activities menu; or click the Fix button on the Add or Edit Defect dialog box.**

The Fix Defect dialog box appears.



2 **Select a user from the Fixed By pop-up menu.**

If you need to add a new user to the menu, choose **New User** from the pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

3 **Check the date.**

The date defaults to the current date. However, you may enter another date if you prefer.

4 **Enter a version number.**

Enter the version of the product in which the defect was found.

5 **Select a resolution from the Resolution pop-up menu.**

TestTrack comes with default **resolution** values. You may use these, or you may customize them. See “Configuring field values” in Chapter 3, “Working with Project Files,” if you want to add or change values.

6 **Enter the Hours to Fix.**

You may find this information useful for future planning and for estimating the time it will take to fix similar defects.

7 **Select the Affects Documentation check box or the Affects Test Plan check box if either apply.**

To help your documentation team keep up to date, be sure to supply this information.

**8 Choose Save & Assign, or OK.**

The following explains your choices:

**Save & Assign** Choose **Save & Assign** to save your work and assign the defect to a responsible person to verify. The Assign Defect dialog box appears. Fill in the fields on the dialog box and choose **OK**. You return to the Defects list window.

**OK** If you're not ready to assign the defect to a responsible person to verify, choose **OK**. You return to the Edit Defect dialog box; choose **OK**. You can edit the defect later and assign a responsible person then.

# Verifying a defect

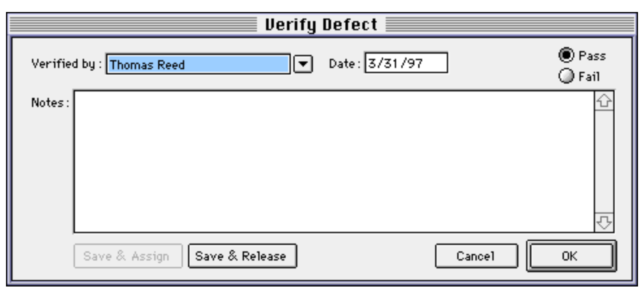
After a user fixes a defect, another user should verify that the "fix" actually resolves the problem. The verification step results in one of two possible outcomes:

- The defect **passed** the verification and can be closed.
- The defect **failed** the verification and still needs to be fixed.

To indicate a fixed defect has passed or failed verification:

**1 Select the defect and choose Verify from Defect Actions on the Activities menu; or click the Verify button on the Add or Edit Defect dialog box.**

The Verify Defect dialog box appears.



**2 Select a user from the Verified By pop-up menu.**

To add a new user to the menu, choose **New User** from the **Verified By** pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

**3 Check the date.**

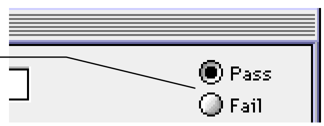
The date defaults to the current date. However, you may enter another date if you prefer.

**4 Enter an explanation in the Notes field.**

It’s a good idea to record why the defect failed. It may help you make a decision in future planning.

**5 Choose either the Pass or Fail radio button.**

Be sure to select a radio button. TestTrack defaults to Pass.




The following describes what to do for each choice:

**Pass** When you choose Pass, your work is finished. Choose OK to close the Verify Defect dialog box.

**Fail** When you choose Fail, the **Save & Assign** button becomes active. Choose **Save & Assign** to save your work and assign the defect to a responsible person to fix.

The Assign Defect dialog box appears. Fill in the fields on the dialog box and choose **OK**.

**6 Choose OK.**

The status in the Defects list window shows the defect passed verification and is Closed. The defect is also **grayed out**, if you chose the option in the Preferences dialog box.

**Note** If you need to re-open the defect, you can. See “Re-opening a defect,” next, for instructions.

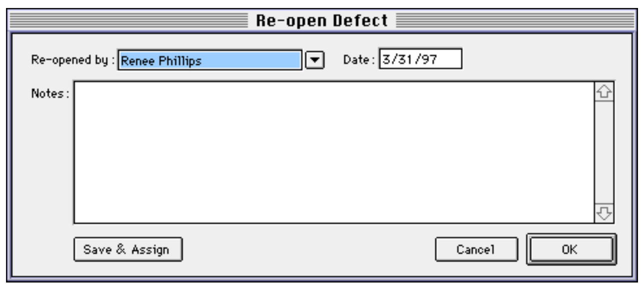
## Re-opening a defect

Occasionally, a closed or verified defect resurfaces. To return the defect to the Open state and start its life cycle over, you need to **re-open** it.

To re-open a closed or verified defect:

1 **Select the defect from the Defects list window and choose Re-open from Defect Actions on the Activities menu; or click the Re-open button on the Add or Edit Defect dialog box.**

The Re-Open Defect dialog box appears.




2 **Select a user from the Re-opened By pop-up menu.**

To add a new user to the menu, choose **New User** from the **Verified By** pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

3 **Check the date.**

The date defaults to the current date. However, you may enter another date if you prefer.

**4 Enter an explanation in the Notes field.**

It's a good idea to record why you re-opened the defect. It may help you make a decision in future planning.

**5 Choose Save & Assign, or choose OK.**

The following explains your choices:

**Save & Assign** Choose **Save & Assign** to save your work and assign the defect to a responsible person to fix. The Assign Defect dialog box appears. Fill in the fields on the dialog box and choose OK. You return to the Defects list window.

**OK** If you're not ready to assign the defect to a responsible person to fix, choose **OK**. You return to the Edit Defect dialog box; choose **OK**. You can edit the defect later and assign a responsible person then.

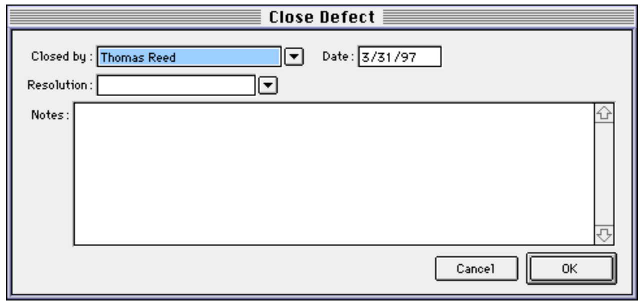
# Closing a defect

The resolution of some defects does not follow the standard fix/verify model. For example, a defect whose type is "not a bug" does not need to be fixed. In this situation, close the defect.

To override the standard life cycle and close a defect:

**1 Select the defect from the Defects list window and choose Close from Defect Actions on the Activities menu; or click the Close button on the Add or Edit Defect dialog box.**

The Close Defect dialog box appears.




**2 Select a user from the Closed By pop-up menu.**

To add a new user to the menu, choose **New User** from the **Verified By** pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2

**3 Check the date.**

The date defaults to the current date. However, you may enter another date if you prefer.

**4 Select a resolution from the Resolution pop-up menu.**

TestTrack comes with default **resolution** values. You may use these, or you may customize them. See “Configuring field values” in Chapter 3, “Working with Project Files,” if you want to add or change values.

**5 Enter an explanation in the Notes field.**

You should explain why you closed the defect for historical purposes.

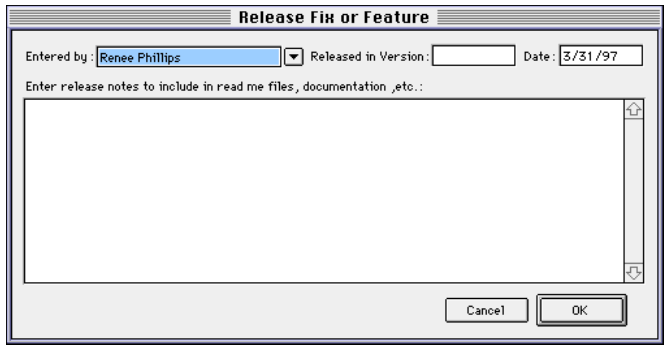
**6 Choose OK.**

# Adding release notes a defect

To add release notes to a defect:

1 **Select the defect from the Defects list window and choose Release Notes from Defect Actions on the Activities menu; or click the Release Notes button on the Add or Edit Defect dialog box.**

The Release Notes dialog box appears.




2 **Select a user from the Entered by pop-up menu.**

If you need to add a new user to the menu, choose **New User** from the pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

3 **Enter the version the release note pertains to.**

4 **Check the date.**

The date defaults to the current date, but you may enter another date.

**5 Enter the release notes.**

The notes are recorded with the history of the defect. Remember, these notes are intended for the end users of your application. Therefore, be specific and use as little jargon as necessary.

---

**Tip** 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 Note guide. See “Generating release notes” in Chapter 10, “Working with reports,” to learn how.

---

**6 Choose OK.**

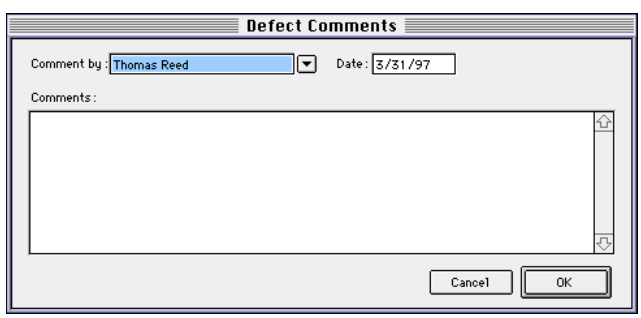
You return to the Add or Edit Defect dialog box. Choose **Add** in the Add Defect dialog box; or **OK** in the Edit Defect dialog box.

# Adding comments to a defect

To add a comment to a defect:

**1 Select the defect from the Defects list window and choose Comments from Defect Actions on the Activities menu; or click the Comments button on the Add or Edit Defect dialog box.**

The Comments dialog box appears.



2 **Select a user from the Comment by pop-up menu.**

If you need to add a new user to the menu, choose **New User** from the pop-up menu. See “Adding a user” in Chapter 6, “Working with Users,” for instructions. Pick up at step 2.

3 **Check the date.**

The date defaults to the current date, but you may enter another date.

4 **Enter the comments.**

The notes are recorded with the history of the defect. You can view them later on the History tab.

5 **Choose OK.**

You return to the Add or Edit Defect dialog box. Choose **Add** in the Add Defect dialog box; or **OK** in the Edit Defect dialog box.

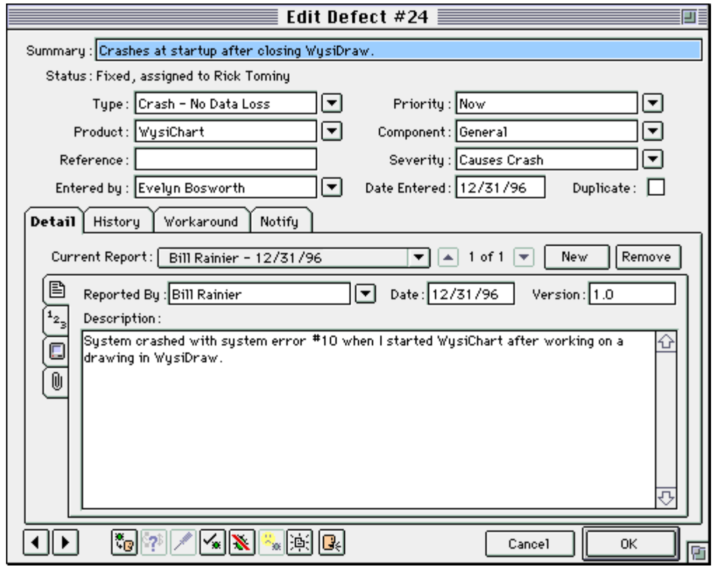
# Changing a defect action

If you made a mistake in the defect action dialog box, or if you simply want to add more information to a note box, you can edit the defect action. For example, if a resolution to a defect affected documentation, but you forgot to select the Affects Documentation check box, you can edit the defect action and select the check box.

To edit a defect action:

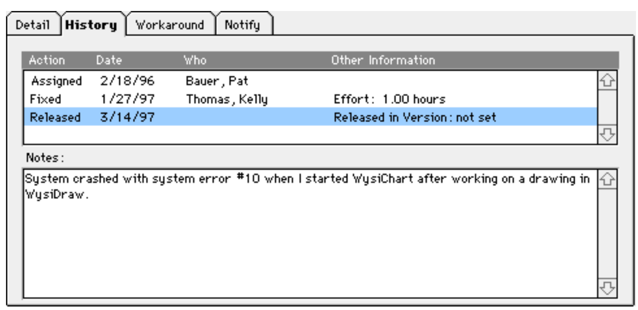
1 **Select the defect from the Defects list window and choose Edit.**

The Edit Defect dialog box appears.




2 **Click the History tab.**

A list of all the actions performed on the defect appears.




3 **Select the defect action you want to change.**

4 **Choose Edit Action from the Edit menu.**

A dialog box for the defect action you chose appears.

5 **Make any changes.**

6 **Choose OK.**

You return to the Edit Defect dialog box.

7 **Choose OK.**

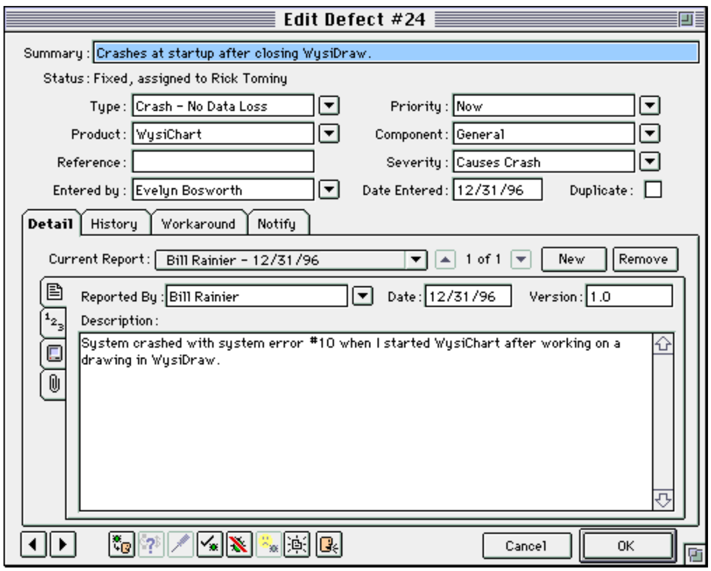
You return to the Defects list window.

# Deleting a defect action

To delete a defect action:

1 **Select the defect from the Defects list window and choose Edit.**

The Edit Defect dialog box appears.




2 **Click the History tab.**

A list of all the actions performed on the defect appears.

3 **Select the defect action you want to delete.**

4 **Choose Delete Action from the Edit menu.**

The defect action is deleted from the History tab on the Edit Defect dialog box.

5 **Choose OK.**

You return to the Defects list window.

# Renumbering a defect

Over the course of working with your project file, you may delete or merge defects leaving holes in the sequence of defect numbers. Or, at the start of a new development cycle, you may wish to purge all closed defects from the project file and use it as a fresh starting point for your testing efforts. TestTrack provides the ability to renumber your defects at any time.

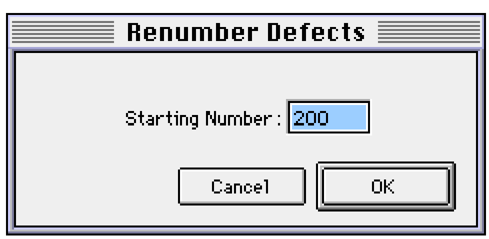
To renumber a defect:

1 **Select the defect you want to renumber from the Defects list window.**

To select a range of defects, **click** the first item in the range, then **shift-click** the last item. To select multiple items not in a range, **command-click** each item.

2 **Select the Renumber Defects from Defect Actions on the Activities menu.**

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



**3 Enter a new number for the defect.**

Enter an unused defect number.

**4 Click OK.**

The Renumber Defects dialog closes and the defect is renumbered.

If the renumbered defect's number 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 project file would be numbered 1011 and you renumber a defect to 1200, the next defect added will be 1201.

---

**Tip** If you select the entire defect list and renumber it, you may still need to set the next available defect number to a value of one greater than the highest defect number in the defect list. This ensures that new defects continue in the proper sequence. See "Deferred defect numbering," earlier in this chapter, to learn how to set the next available defect number.

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# 5 Working with User Groups

## Contents



## Safe and Secure!

In a **multi-user project file**, user groups are your key to security. If security is important to you, create user groups up front to handle all of your security levels.

This chapter explains how to add, change, view and delete user groups. The chapter starts with an explanation of how user groups affect security in multi-user project files.

# About user groups and security

A user group is a collection of users who share responsibilities and perform similar tasks.

**Note** User group **security** functionality pertains only to **multi-user** project files.

When you set up a multi-user project file, create the user groups **first**. This lets you create a **security structure** to hold all of your users.

You can create many kinds of security structures. For example, you could create the following simple structure and name the user groups according to their 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 simple 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 |

You can create a simple security structure as shown in this example, or you can create a complex structure. Whatever your needs, you may find it helpful to create a matrix listing the kinds of users you'll be adding to the project file 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 command-specific as you need.

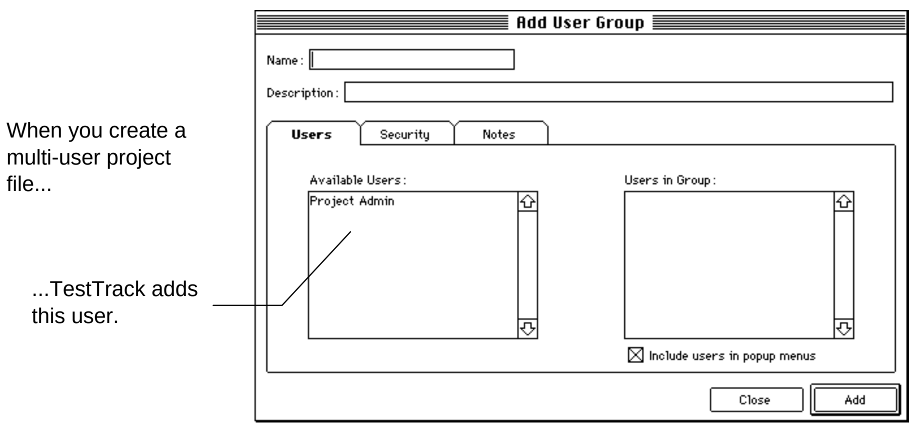
**Tip** If you want **all** of your users to have access to **all** of the commands, you do not have to create user groups! TestTrack adds a user group called "Administration" when you create a multi-user project file. This user group grants access to every command in TestTrack. Simply add the users to this default user group.

# Adding a user group

To add a user group:

**1 Choose User Group from the Create menu, or click the Add button on the User Groups list window.**

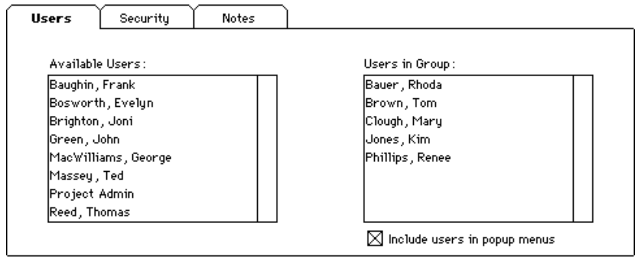
The Add User Group dialog box appears.



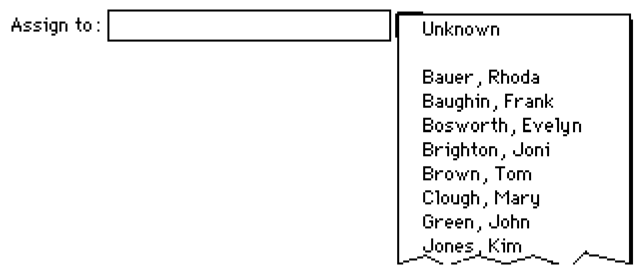
**2 Enter a name and description.**

You must supply the name and description.

**3 On the Users tab, make sure the Include users in pop-up menus checkbox is selected.**




By default, this checkbox is always selected. This checkbox controls whether users in the group appear in the user list pop-up menus. If you track lots of names in the user list, the pop-up menu can become quite long.




The following explains when to check/clear the box:

- **Select the checkbox** if you are adding a user group intended for users who participate in the defect life cycle. You want these users to appear in the user list pop-up menus so you can assign defects to them, etc.

- **Clear the checkbox** if you are adding a user group intended to hold users who only report bugs. This will prevent the user list pop-up menus from becoming too long by listing all the users.

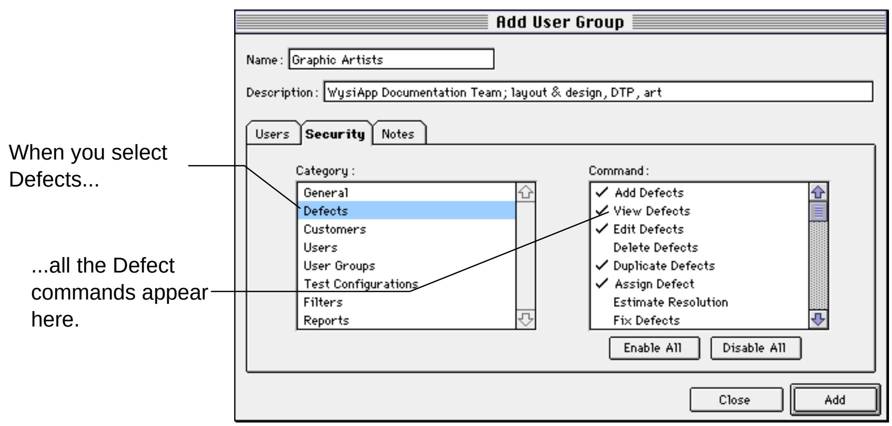
**Where to go next...**

Skip the rest of the Users tab—it’s best to create the user group **security structure** first. You can add users to the user groups **later.** However, if you’re adding a user group to an **existing** user group structure and the users are already in the project file, **add the users now**. See “Adding users to a user group, “ next, for detailed instructions.

**4 Click the Security tab, and set the security for each category in the Category list box.**

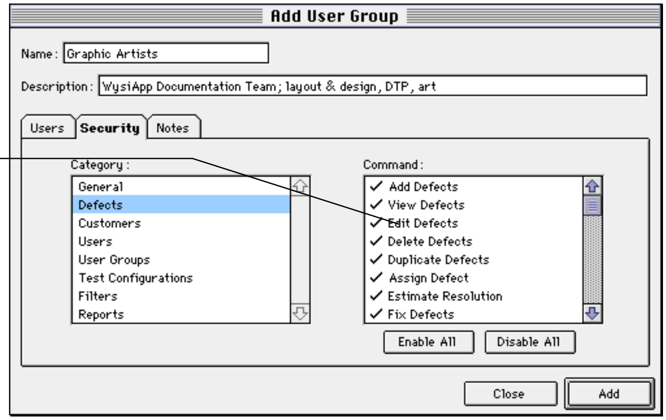
The following explains:

When you select a category in the **Category** list box, all the commands that pertain to the category appear in the **Command** list box.



A **check mark** beside a command means the user group has access to that command. To block access to a command, remove the check mark by clicking on it.

Click on a check mark to toggle it off.




**Note** Be sure to set the commands for **each** category in the Category list box. TestTrack defaults to **Enable All** commands in each category.

**5 Click the Notes tab, and enter any pertinent information.**

**6 Choose Add.**

The Add User Group dialog box clears and you're ready to add another user group. When you're finished, choose **Cancel**.

**Tip** The user group is added to the project file and appears in the User Groups list window. The user groups are listed in alphabetical order; don't forget you can sort on any field—just click on the column heading.  You can also add more columns or change the sort order. See "Using a list window," in Chapter 3, "Working with Project Files," to review.

# Adding users to a user group

After you create the user group **security structure**, it's time to add users to the user groups.

---

**Note** If you are adding user groups currently and you are on the **Add User Groups** dialog box, skip to step 3.

---

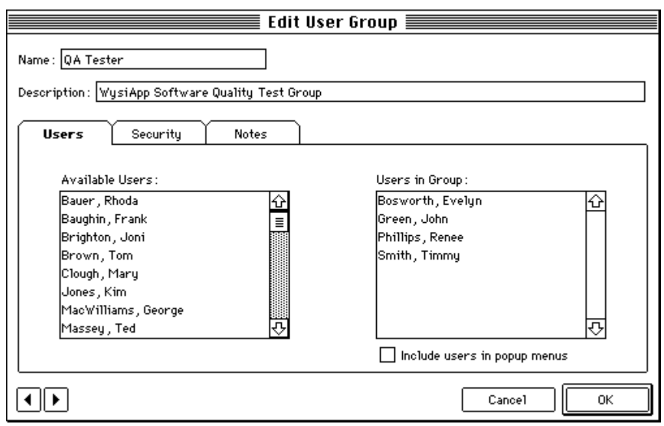
To add users to a user group:

**1 Select the user group you want to add users to from the User Groups list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

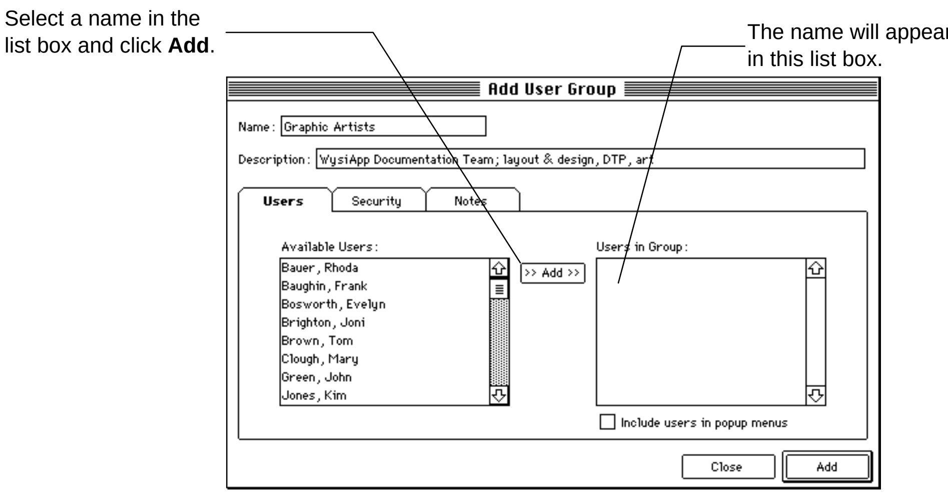
**2 Choose Edit User Group from the Edit menu, or click the Edit button on the User Groups list window.**

The Edit User Group dialog box appears.



**3 Select a user from the Available Users list box and click Add.**

The name appears in the **Users in Group** list box. Repeat this step for all the users you want to add to the user group.




**Tip** A user can belong to one user group. When you assign a user to a new user group, he or she leaves the old group and joins the new group automatically.

**4 Click Add.**

The users are added to the user group.

# Viewing a user group

To view a user group:

**1 Select the user group you want to view from the User Groups list window.**

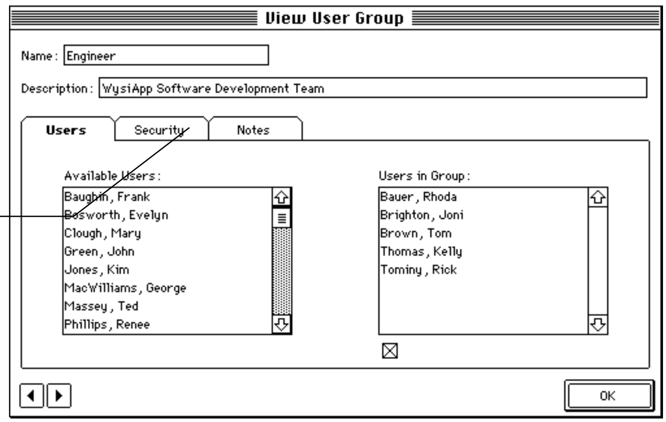
You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **View** button is bold, **double-click** the user group to select it and open the View User Group dialog box at the same time. You can set this preference in the Preferences dialog box.

**2 Choose View User Groups from the Edit menu, or click the View button on the User Groups list window.**

The View User Group dialog box appears.

Click on a tab to view its contents.




**Tip** When viewing or editing a user group, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the user groups.

**3 Choose OK when you're finished.**

You return to the User Groups list window.

## Changing a user group

To change a user group:

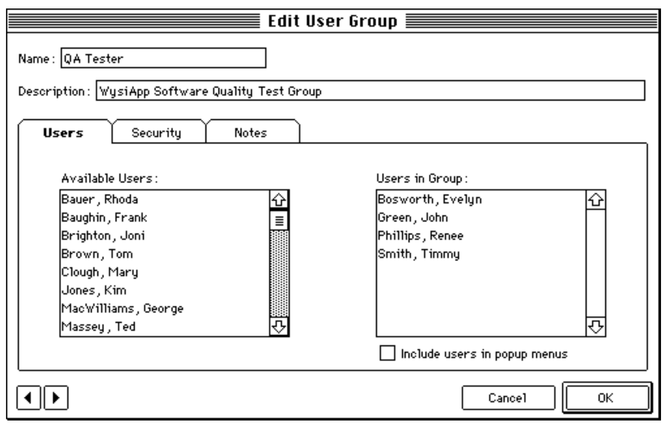
1 **Select the user group you want to change from the User Groups list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **Edit** button is bold, **double-click** the user group to select it and open the Edit User Groups dialog box at the same time. You can set this preference in the Preferences dialog box.

2 **Choose Edit User Group from the Edit menu, or click the Edit button on the User Groups list window.**

The Edit User Group dialog box appears.




**Tip** When viewing or editing a user group, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the user groups.

3 **Make any changes.**

4 **Choose OK.**

You return to the User Groups list window. Your changes have been made.

## Deleting a user group

To delete a user group:

1 **Select the user group you want to delete from the User Groups list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

2 **Choose Delete User Group from the Edit menu, or click the Delete button on the User Groups list window.**

The user group is removed from the User Groups list window.

# 6 Working with Users

## Contents



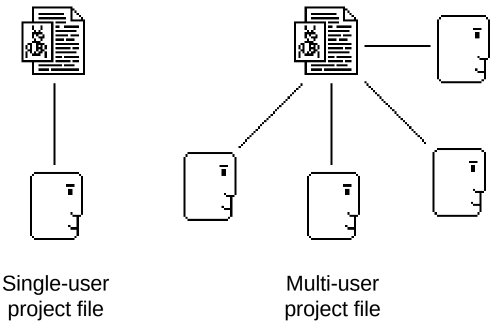
## Defect, defect, who has the defect!

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

This chapter explains how to add, change, view and delete users. The chapter starts with an explanation of the differences between users in multi-user and single-user project files.

# About users

A user is anyone who can access TestTrack and is involved in the testing process. Users are treated differently in **single-user** and **multi-user** project files.




**Single-user project file**

If you are using a single-user project file, you have access to **every command** in TestTrack.

Single-user project files do not have user group security; however, you are not totally without security. You can password protect your project file so only you can access it, or you can give the password to your team members. If you prefer, you can omit the password so anyone can access the file.

As a single user, you should add a list of users who will be reporting, fixing, and verifying bugs. This lets you quickly pick their names from the pop-up menus when you work with defects.

**Multi-user project file**

If you are using a multi-user project file, you can access only those commands granted to the **user group** you belong to. Unless you are the project administrator or have been granted high clearance, you probably will not add users to the project file.

As a user in a multi-user project file, you should set your own password to protect your security level. If you have a high security level, a password keeps lower-level users from using your user name to gain access to higher-level commands, compromising the security of the project file.

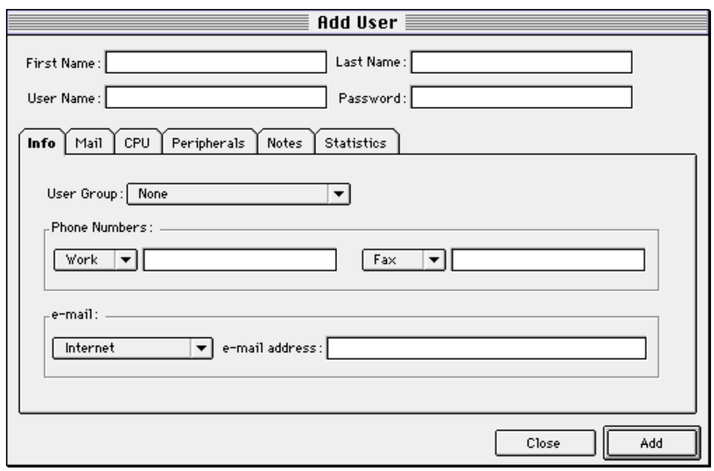
# Adding a user

**Note** When you add users to a **multi-user project file**, you must place them in a **user group**. You can add them to the **full-security user group** "Administration," which TestTrack adds automatically when you create a multi-user project file, or you can add them to user groups you created to handle your company's varied security needs. If you want to use custom user groups, and you have not yet created them, see "Adding a user group" in Chapter 5, "Working with User Groups."

To add a user:

**1 Choose User from the Create menu, or click the Add button on the Users list window.**

The Add User dialog box appears.



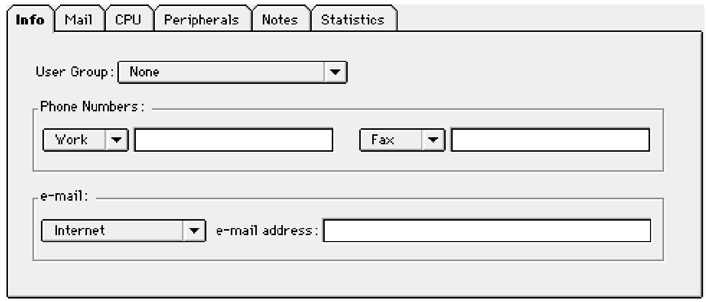

**2 Enter the user information.**

You must supply a First Name, Last Name, and User Name. You do not have to supply a Password; you can let the user enter his or her own.

**Note** You may want to assign the user a password to **protect** a high-security user group. The user can then change the password when he or she logs on.

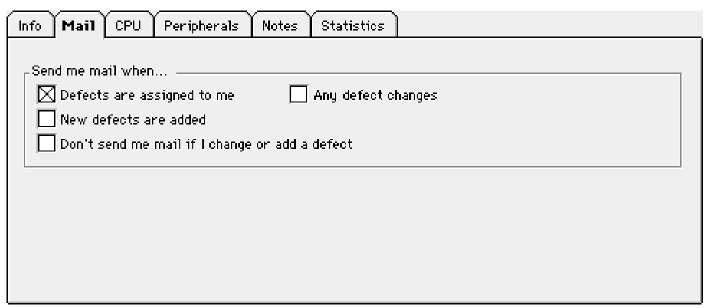
**3 Enter the information on the Info tab.**

If you are in a **multi-user** project file, you **must** select a user group from the User Group pop-up menu. All other information is optional.




**Note** The e-mail group box contains the user's preferred method of receiving e-mail and the user's e-mail address. TestTrack's e-mail notifications are sent to this e-mail address. Make sure you accurately enter this information to ensure e-mail notifications reach the user.

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




The following describes each option:

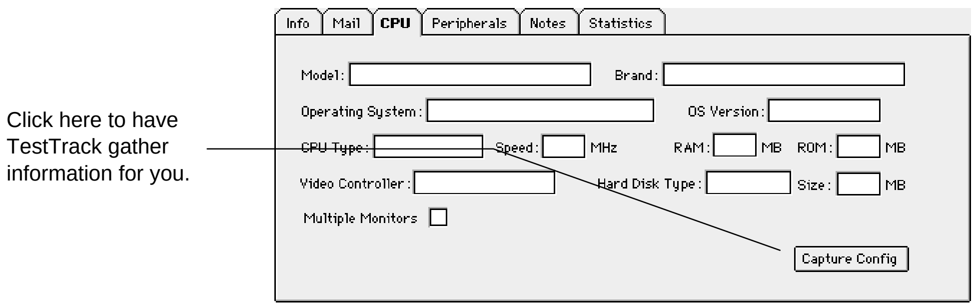
- Click the **Defects are assigned to me** check box if you want to receive e-mail when defects are assigned to you.
- Click the **Any defect changes** check box if you want to receive e-mail whenever a defect is edited.

- Click the **New defects are added** check box if you want to receive e-mail when defects are added to the project file.

- Click the **Don’t send me mail if I change or add a defect** check box if you don’t want TestTrack to send you e-mail when you are the user who edited or added the defect.

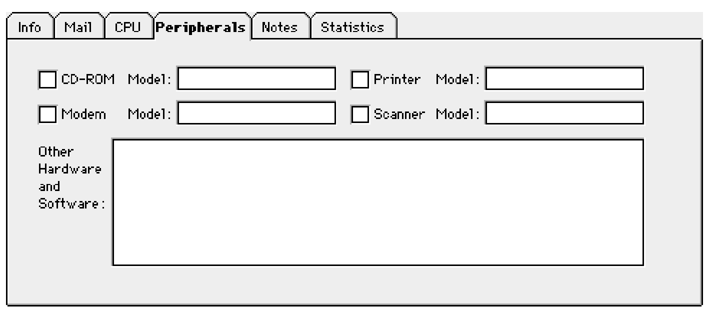
**5 Enter the information on the CPU tab.**

Click **Capture Config** to have TestTrack fill in a few of the fields for you. These fields are optional; however, you should enter as many as possible.

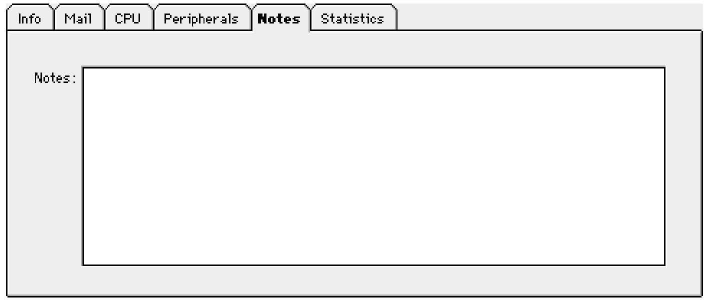



**6 Enter the information on the Peripherals tab.**

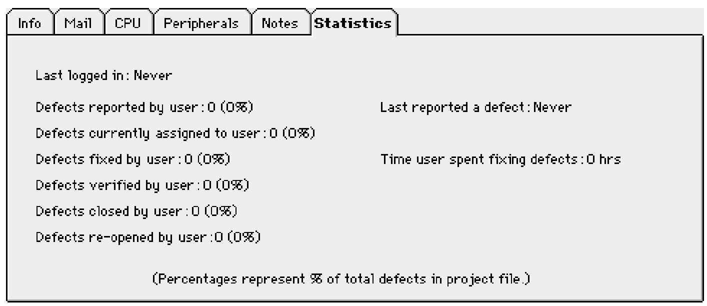
These fields are optional; however, you should enter as many as possible.



**7 Enter any notes you want to keep track of on the Notes tab.**




**Note** For future reference, **click the Statistics tab**. You can not add anything to this tab, but notice that it contains statistical information calculated for you. You'll use this tab most often when viewing user information. See “Viewing a user,” next, for details.




**8 Choose Add.**

The Add User dialog box clears and you're ready to add another user. When you're finished, choose **Cancel**.

**Tip** The user is added to the project file and appears in the Users list window. The users are listed in alphabetical order; don't forget you can sort on any field—just click on the column heading. You can also add more columns or change the sort order. See “Using a list window,” in Chapter 3, “Working with Project Files,” to review.

# Viewing a user

To view a user:

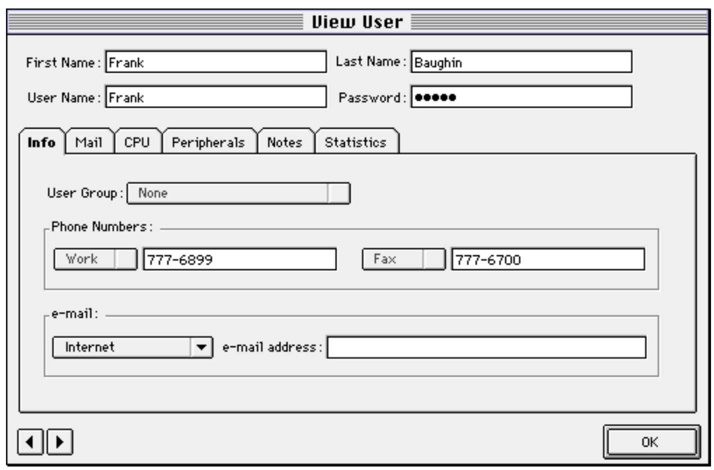
**1** **Select the user you want to view from the Users list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **View** button is bold, **double-click** the user to select it and open the View User dialog box at the same time. You can set this preference in the Preferences dialog box.

**2** **Choose View Users from the Edit menu, or click the View button on the Users list window.**

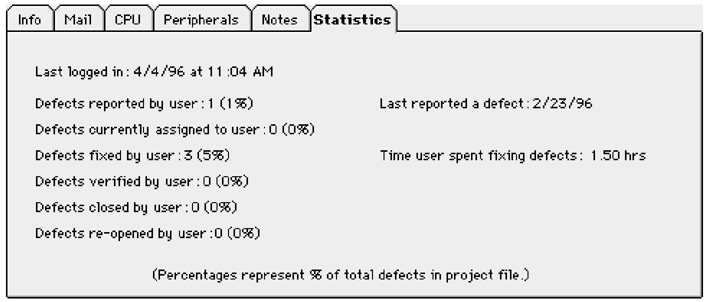
The View User dialog box appears.




**Tip** When viewing or editing a user, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the users.

**3 Click the Statistics tab.**

You should, of course, view the other tabs too, but always be sure to view the Statistics tab for the user stats gathered and calculated for you.




**4 Choose OK when you're finished.**

You return to the Users list window.

# Changing a user

To change a user:

**1 Select the user you want to change from the Users list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

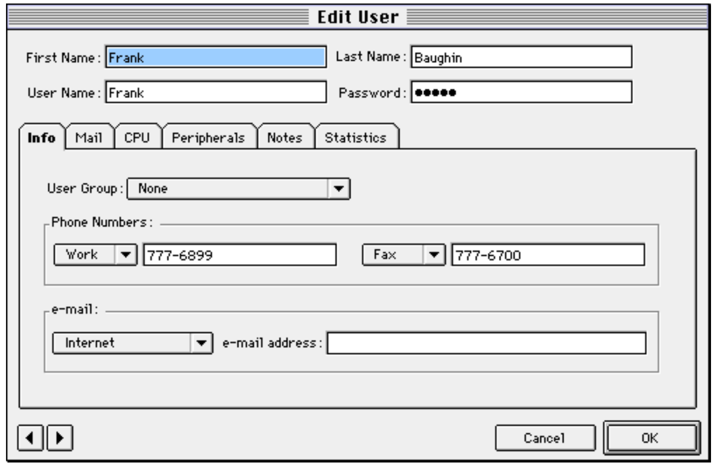
---

**Tip** If the **Edit** button is bold, **double-click** the user to select it and open the Edit User dialog box at the same time. You can set this preference in the Preferences dialog box.

---

**2** **Choose Edit Users from the Edit menu, or click the Edit button on the Users list window.**

The Edit User dialog box appears.




**Tip** When viewing or editing a user, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the users.

**3** **Make any changes.**

**4** **Choose OK.**

You return to the Users list window. Your changes have been made.

# Deleting a user

To delete a user:

**1** **Select the user you want to delete from the Users list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

2 **Choose Delete User from the Edit menu, or click the Delete button on the Users list window.**

The user is removed from the Users list window.

# Making a customer a user

In the event a user is accidentally added to the customer list or you want to provide a customer with direct access to your project file, TestTrack makes it easy to transfer the customer from the Customer list to the User list.

To make a user a customer:

1 **Select the customer you want to convert from the Customers list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

2 **Choose Transfer to User List from the Edit menu.**

The customer is removed from the Customers list window and appears in the User list window. At this point, you should give the new user a user name and password and set their user group so they can access the project file.

# 7 Working with Customers

## Contents



## Customers—your most valuable asset!

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

This chapter explains how to add, change, view and delete customers.

# About customers

A customer is anyone who does not participate in the defect life cycle, but does reports bugs, feature requests or other issues that you track in your project file. Customers are typically the end users of your products or services. Unlike users, customer do not have direct access to the TestTrack project file.

The following are three ways to add customers to the database:

**Importing a Solo Bug file**

If you import a Solo Bug file from a customer and the customer does not already exist in the database file, TestTrack adds the customer for you. .

**Making a user a customer**

TestTrack 1.5 and previous versions did not support customers as their own entity—you simply tracked customers through the Users list window. TestTrack 1.6 introduced customer support and a Customers list window. If you have customers entered as users, you can convert them quickly using the **Transfer to Customer List** menu item. See Chapter 6, “Working with Users,” to learn how to do this.

**Adding a customer manually**

If a customer does not use Solo Bug to report bugs, you can add him or her to the database manually just as you would add a user.

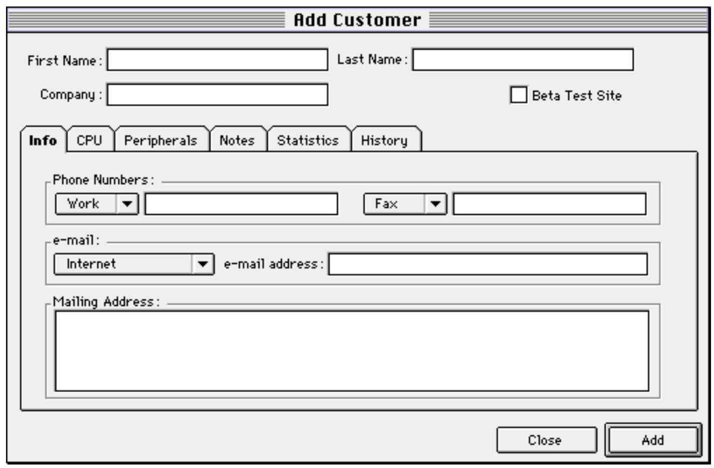
# Adding a customer manually

**Tip** Have your customers use Solo Bug to report their bugs, and skip this task! If you import a Solo Bug file and the customer does not already exist in the database file, TestTrack adds the customer for you. See Chapter 12 “Working with Solo Bug,” for details.

To add a customer:

1. **Choose Customer from the Create menu, or click the Add button on the Customers list window.**

   The Add Customer dialog box appears.

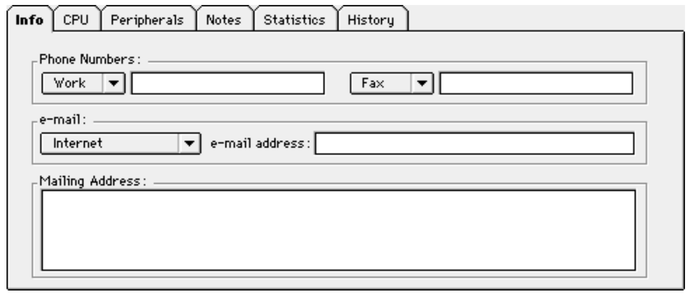



2. **Enter the customer information.**

   You must supply a First Name, Last Name, and Company Name. You can also mark whether the customer is a Beta Site.

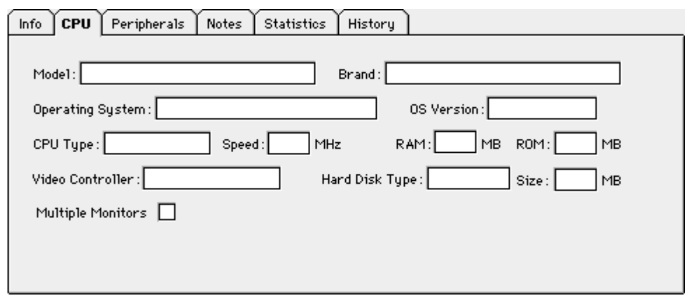
### 3 Enter the information on the Info tab.

All information is optional.



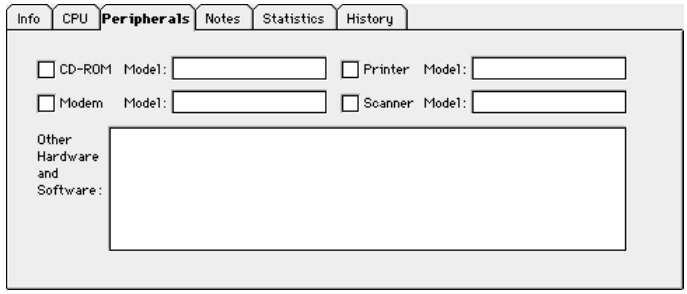

### 4 Enter the information on the CPU tab.

These fields are optional; however, you should enter as many as possible.

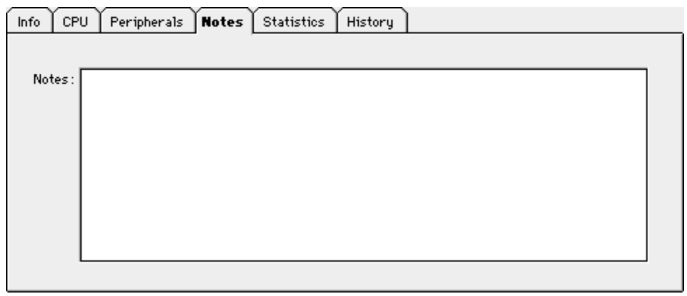


**5 Enter the information on the Peripherals tab.**

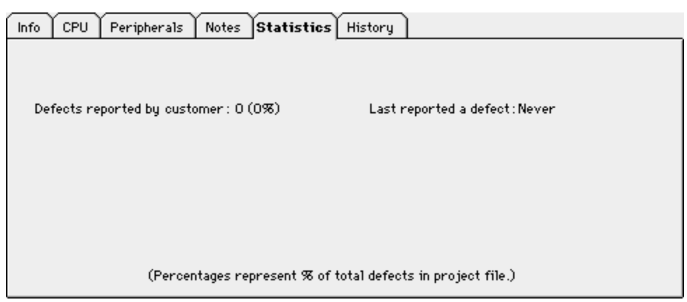
These fields are optional; however, you should enter as many as possible.




**6 Enter any notes you want to keep track of on the Notes tab.**




**Note** For future reference, **click the Statistics tab**. You can not add anything to this tab, but notice that it contains statistical information calculated for you. You'll use this tab most often when viewing customer information. See "Viewing a customer," next, for details.



7 **Choose Add.**

The Add Customer dialog box clears and you're ready to add another customer. When you're finished, choose **Cancel**.

---

**Tip** The customer is added to the project file and appears in the Customers list window. By default, the customers are listed in alphabetical order; don't forget you can sort on any field—just click on the column heading. You can also add more columns or change the sort order. See "Using a list window," in Chapter 3, "Working with Project Files," to review.

---

## Making a user to a customer

TestTrack 1.5 and previous versions did not support customers as their own entity—you simply tracked customers through the Users list window. TestTrack 1.6 introduced customer support and a Customers list window. If you have customers entered as users, you can convert them quickly using the **Transfer to Customer List** menu item.

To convert a user to a customer: :

1 **Select the user you want to transfer to a customer from the Users list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

2 **Choose Transfer to Customer List from the Edit menu.**

TestTrack converts the user to a customer. The customer appears in the Customers list window.

---

**Note** The Transfer to Customer List menu item is a **toggle**. When you are in the Customers list window, the menu item changes to **Transfer to User List**. At any time, you can select a customer and convert it to a user.

---

# Viewing a customer

To view a customer:

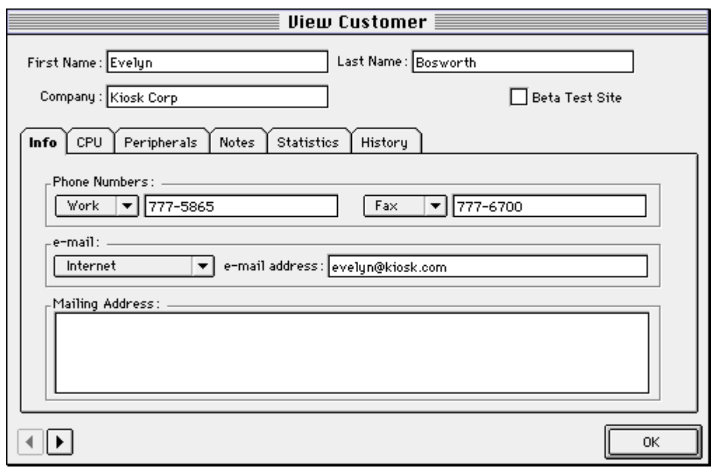
**1 Select the customer you want to view from the Customers list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **View** button is bold, **double-click** the customer to select it and open the View Customer dialog box at the same time. You can set this option in the Options dialog box.

**2 Choose View Customer from the Edit menu, or click the View button on the Customers list window.**

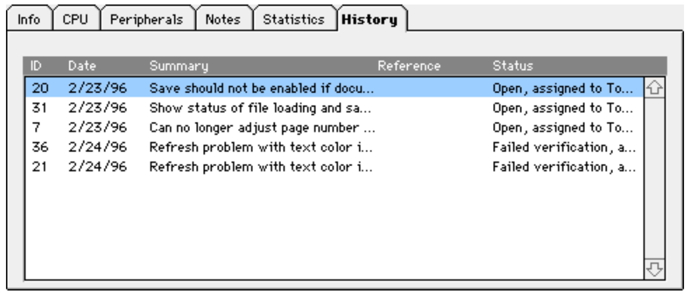
The View Customer dialog box appears.




**Tip** When viewing or editing a customer, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the customers.

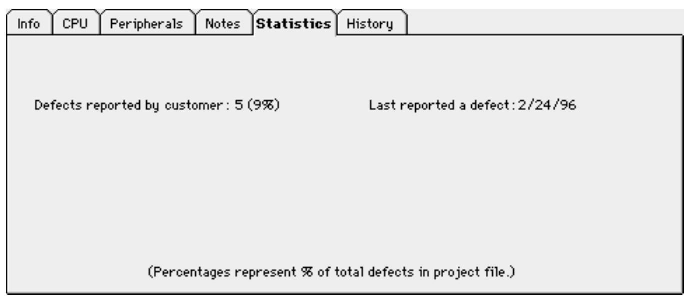
**3 Click the History tab.**

The customer history tab shows all defect reported by the customer. You can view any defect’s detail information by double-clicking on it in the list.




**4 Click the Statistics tab.**

You may, of course, view the other tabs too, but always be sure to view the Statistics tab for the customer stats gathered and calculated for you.




**5 Choose OK when you’re finished.**

You return to the Customers list window.

# Changing a customer

To change a customer:

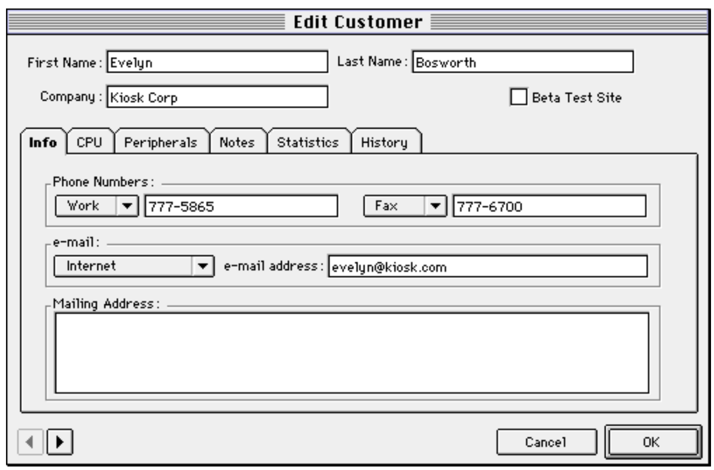
1 **Select the customer you want to change from the Customers list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **Edit** button is bold, **double-click** the customer to select it and open the Edit Customer dialog box at the same time. You can set this option in the Options dialog box.

2 **Choose Edit Customer from the Edit menu, or click the Edit button on the Customers list window.**

The Edit Customer dialog box appears.




**Tip** When viewing or editing a customer, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the customers.

3 **Make any changes.**

**4 Choose OK.**

You return to the Customers list window. Your changes have been made.

# Duplicating a customer

To duplicate a customer:

**1 Select the customer you want to duplicate from the Customers list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**2 Choose Duplicate Customer from the Edit menu.**

TestTrack duplicates the customer.

# Deleting a customer

To delete a customer:

**1 Select the customer you want to delete from the Customers list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**2 Choose Delete Customer from the Edit menu, or click the Delete button on the Customers list window.**

The customer is removed from the Customers list window.

# 8 Working with Filters

## Contents



## Filter Out the Noise!

Filters let you see only what you want to see. Once you create a filter, you can use it over and over to sift and sort your data. Create as many filters as you need to handle your search requirements. If you are in a multi-user project file, you can share your filters with others, or you can keep them private.

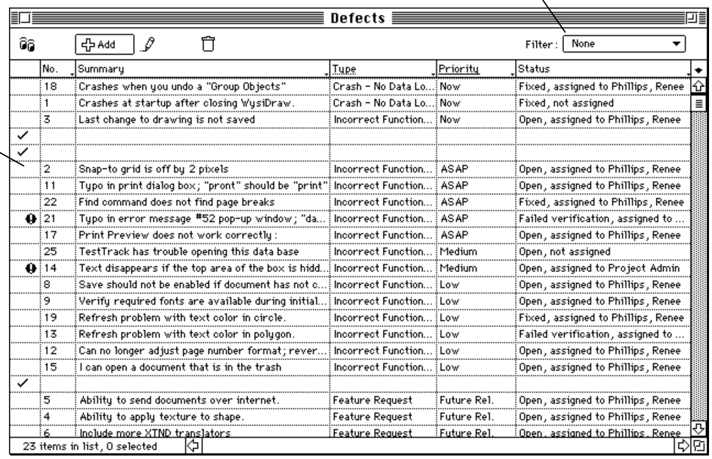
This chapter explains how to add, change, view and delete filters. The chapter starts with an explanation of how filters can help you list specific data and save time.

# About filters

Filters only apply to **defects**. Filters allow you to selectively list which defects you see in the Defects list window. The following shows the Defects list window with **no filter** selected:

No filter is selected.

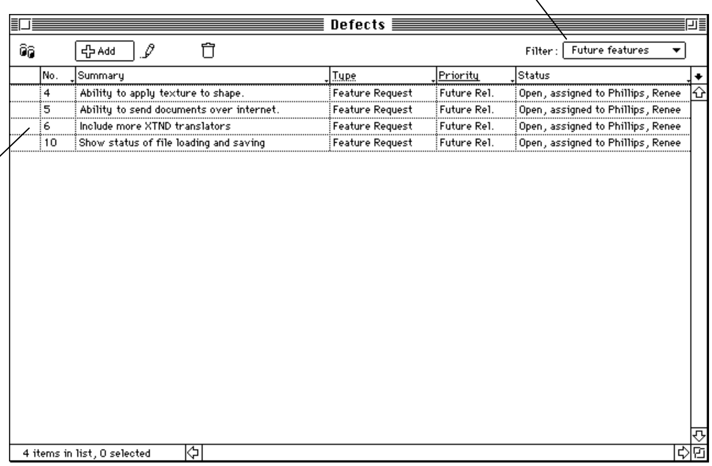
All the defects in the project file appear in the list window.




The following shows the Defects list window with a filter selected. This filter reduces the list to only those defects that are feature requests:

A filter is selected.

Only those defects that are feature requests appear in the list window.

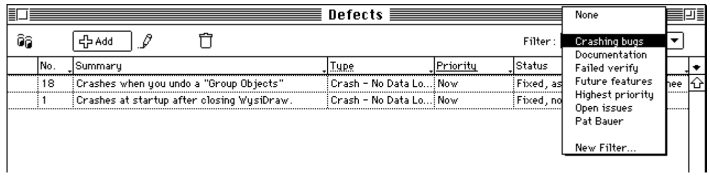



---

**Note** You can also use filters to selectively list defects you want to appear in reports.

---

When you create a filter, you give it a name, which appears on the Filter pop-up menu. When you want to user the filter, select it from the pop-up menu.



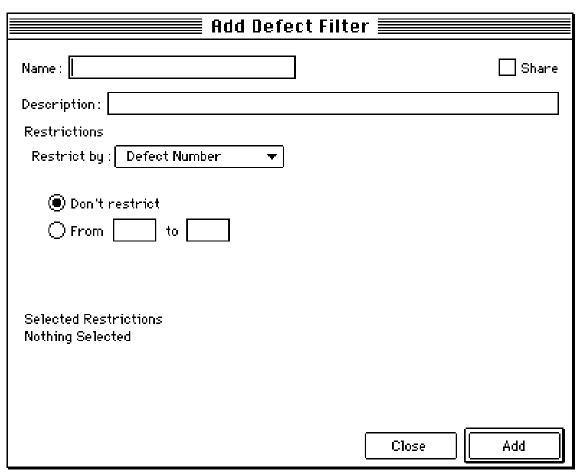

If you're working in a multi-user project file, you can choose to "share" a filter when you create it. Other users can see a shared filter in their pop-up menu. They can use it and edit it. If you don't want to share a filter, you can keep it private.

# Adding a filter

To add a filter:

**1** **Choose Filter from the Create menu, or click the Add button on the Filters list window, or select New Filter from the Filter pop-up menu on the Defects list window.**

The Add Defect Filter dialog box appears.

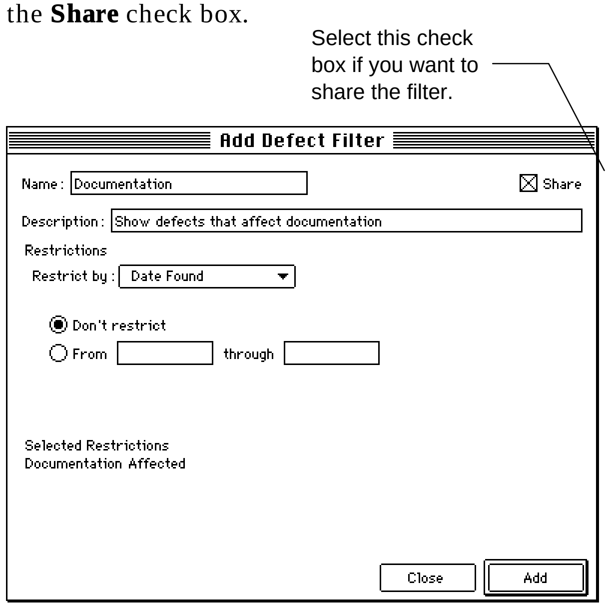


**2 Enter a name and description for the filter.**

You must supply a name and a description.

---

**Note** If you are working with a **multi-user** project file, select the **Share** check box if you want others to use your filter. Remember, however, that others will also be able to **edit your filter**. If you want your filter protected, do not select the **Share** check box.

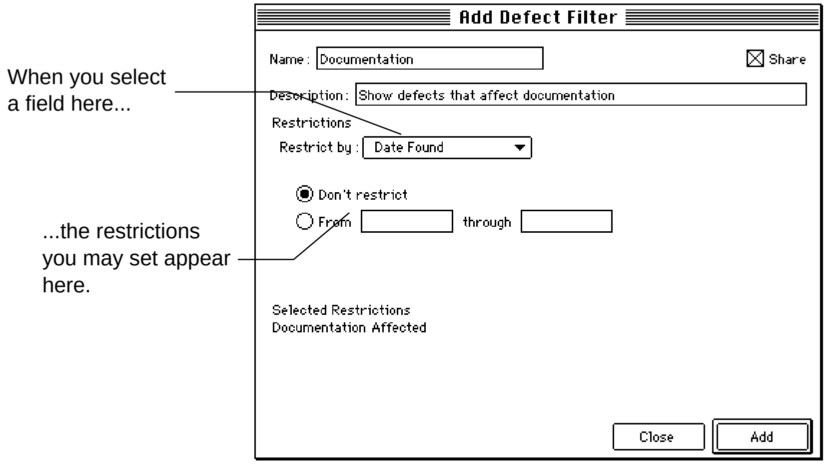



You can share a filter any time. However, once a filter is marked “shared,” it remains a shared filter—you can’t make it private again.

---

**3 Select all the fields you want included in the filter from the Restrict By pop-up menu, and select the restrictions for each field.**

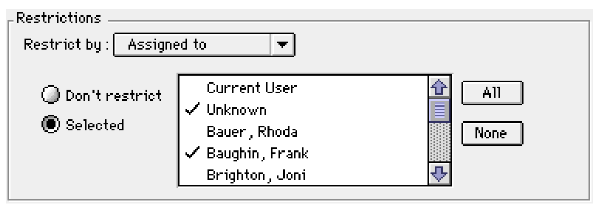
When you select a field from the **Restrict By** pop-up menu, the restrictions you can set for the field appear.




One of four kinds of options appears for each field:

### List box

When a **List box** appears, click on the items you want in the filter. A check mark appears beside selected items.



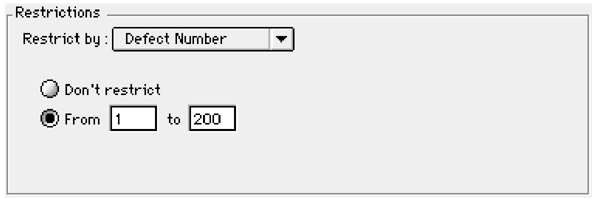

The list boxes that display lists of TestTrack users contain two extra entries at the top of the list: Current User and Unknown.

**Current User** represents the current user logged into a multi-user project file. For example, if you select Current User with Restrict by set to Assigned To, you are saying “Show me all defects assigned to me.” If another user logs in, TestTrack shows the defects assigned to that user.

**Unknown** represents an empty field. For example, if you select Unknown with Restrict by set to Assigned To, you are saying “Show me all defects not assigned to anyone.”

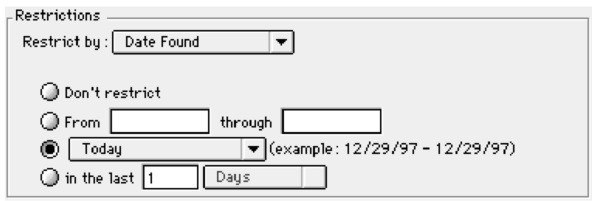
### From/Through Number boxes

When a **From/Through Number box** appears, enter a From and Through number.




### From/Through Date boxes

When a **From/Through Date box** appears, enter a From and Through date. Use the following format: **mm/dd/yy**



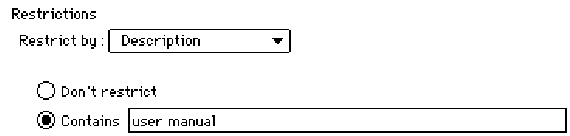

**From/Through** dates specify specific starting and ending dates. Enter these in **mm/dd/yy** format or the date format defined by your configuration.

**Fixed Period** dates specify a period relative to the current date. This period can be today, yesterday, last week, last month, etc. An example is “Restrict by defects fixed this month.” When you select a variable period, TestTrack calculates the filter’s date range based on the current date and displays it for you.

**Variable Period** dates specify a number of days, weeks, months, or years relative to the current date. An example is “Restrict by defects found in the last four weeks.” When you select a variable period, TestTrack calculates the filter’s date range based on the current date and displays it for you.

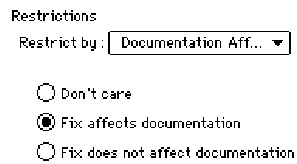
**Contents box**

When a **Contents box** appears, enter a description. This field searches for **word fragments**. What you enter does not have to match exactly what you entered when you added the defect.




**Option buttons**

When option buttons appear, select one. Some option buttons make a list box appear. See “List box,” above.

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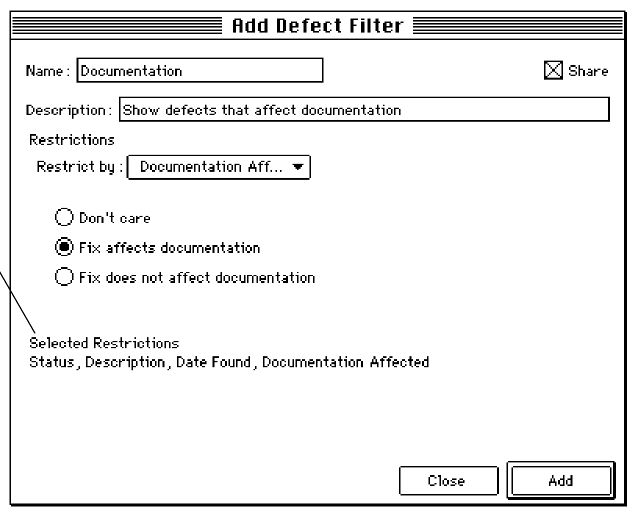
**Note**

You can add as many fields as you wish to the filter. All of the selected fields appear in the **Selected Restrictions** note box.




Look here to see all the fields you have set restrictions on.

---

**4 Choose Add.**

The Add Defect Filter dialog box clears and you're ready to add the next filter. When you're finished, choose **Cancel**.

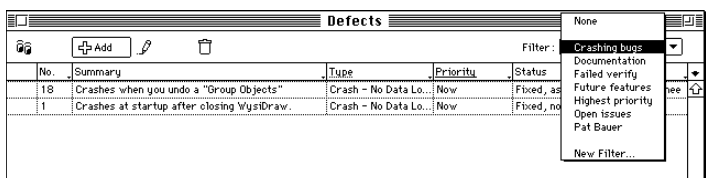
**Tip** The filter is added to the project file and appears in the Filters list window. The filters are listed in alphabetical order; don't forget you can sort on any field—just click on the column heading. You can also add more columns or change the sort order. See "Using a list window," in Chapter 3, "Working with Project Files," to review.

# Using a filter

Before you can use a filter, you must add it to the project file. See "Adding a filter," previous, for instructions.

To use a filter:

**Select the filter name from the Filter pop-up menu on the Defects list window.**




All the restrictions defined in the filter are applied to the defects in the list window.

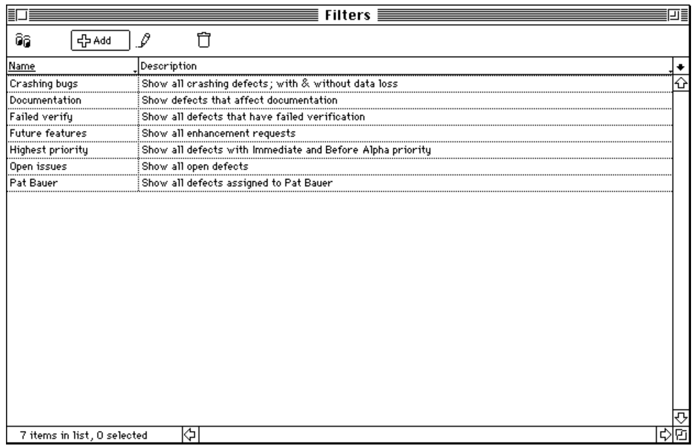
**Note** Filters only can be used in the **Defects list window** and when creating reports.

# Viewing a filter

To view a filter:

**1 Open the Filters list window.**

All the filters appear in the list window.




**2 Select the filter you want to view.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

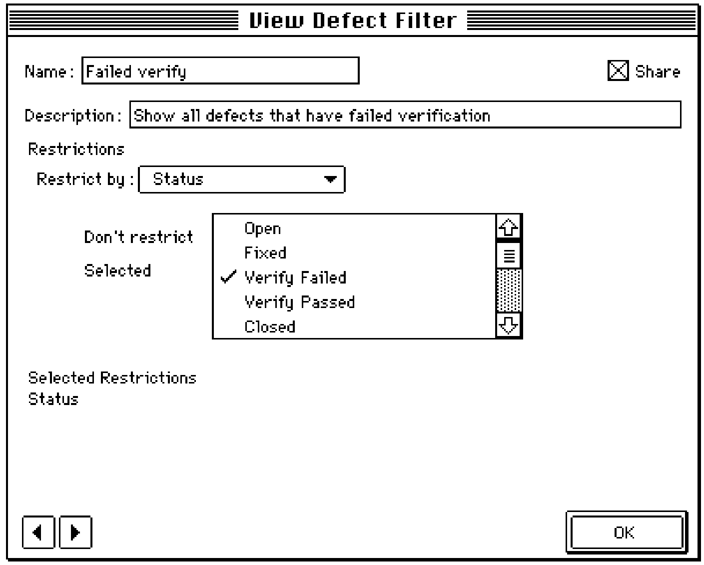
---

**Tip** If the **View** button is bold, **double-click** the filter to select it and open the View Filter dialog box at the same time. You can set this option in the Preferences dialog box.

---

**3 Choose View Filter from the Edit menu, or click the View button on the Filters list window.**

The View Defect Filter dialog box appears.




---

**Tip** When viewing or editing a filter, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the filters.

---

**4 Choose OK when you're finished.**

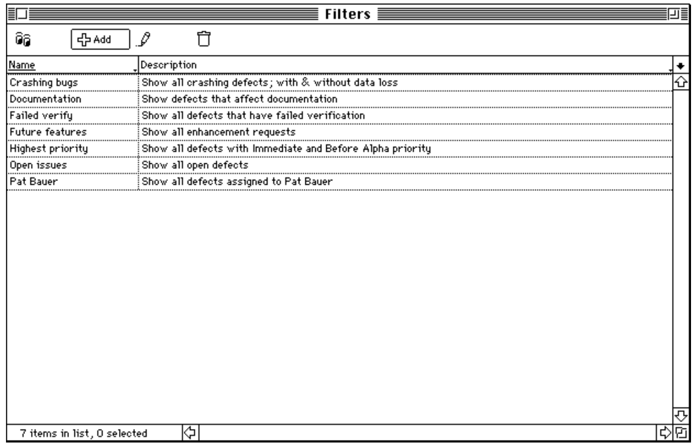
You return to the Filters list window.

# Changing a filter

To change a filter:

**1** **Open the Filters list window.**

All the filters appear in the list window.




**2** **Select the filter you want to edit.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

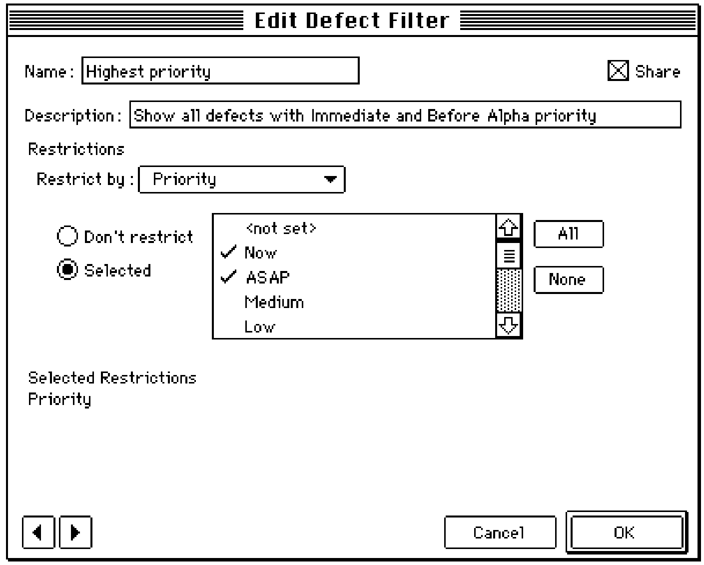
---

**Note** If the **Edit** button is bold, **double-click** the filter to select it and open the Edit Filter dialog box at the same time. You can set this option in the Preferences dialog box.

---

3 **Choose Edit Filter from the Edit menu, or click the Edit button on the Filters list window.**

The Edit Defect Filter dialog box appears.




**Tip** When viewing or editing a filter, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the filters.

4 **Make any changes.**

5 **Choose OK.**

You return to the Filters list window. Your changes have been made.

## Deleting a filter

To delete a filter:

1. **Open the Filters list window.**

2. **Select the filter you want to delete from the Filters list window.**

   You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

3. **Choose Delete Filter from the Edit menu, or click the Delete button on the Filters list window.**

   The filter is removed from the Filters list window.

# 9 Working with Test Configurations

## Contents



## Track the Nuts and Bolts!

It's important to pay attention to the machines 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 chapter explains how to add, change, view and delete test configurations. The chapter starts with an explanation of why tracking test configurations is important.

# About test configurations

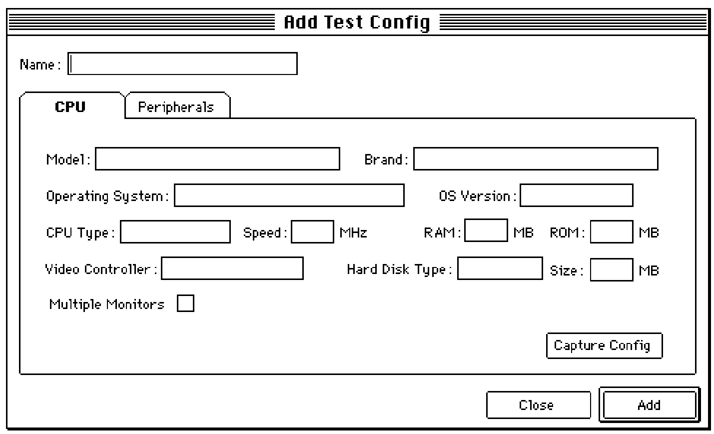
A test configuration simply refers to a specific computer used for testing. You may want to keep track of all your systems to see if bugs are computer-specific. Tracking test configurations helps you identify patterns in defects that may be related to specific hardware configurations or software configurations.

# Adding a test configuration

To add a test configuration:

1 **Choose Test Config from the Create menu, or click the Add button on the Test Configurations list window.**

The Add Test Config dialog box appears.



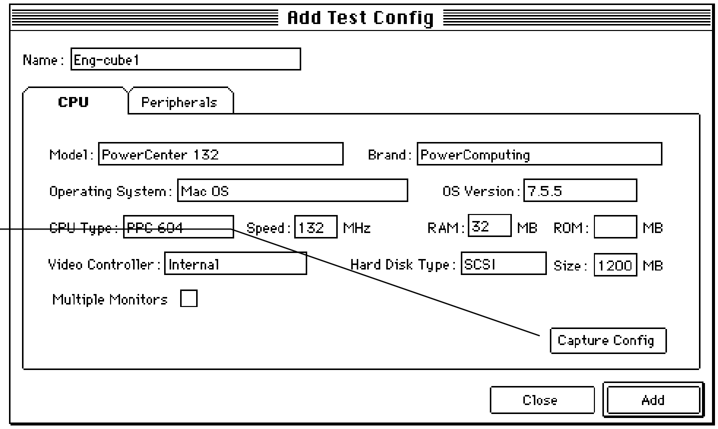

2 **Type a name for the test configuration.**

This name should uniquely identify a single computer. For example, Eng-cube1.

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

Be sure to **click Capture Config** to have TestTrack fill in a few fields for you. These fields are optional; however, you should enter as many as possible.

Click here to have TestTrack capture a few fields.




**4 Click the Peripherals tab, and enter the information.**

These fields are optional; however, you should enter as many as possible.

**5 Choose Add.**

The Add Test Config dialog box clears and you're ready to add the next test configuration. When you're finished, choose **Close**.

---

**Tip** The test configuration is added to the project file and appears in the Test Configurations list window. The test configs are listed in alphabetical order; don't forget you can sort on any field—just click on the column heading. You can also add more columns or change the sort order. See "Using a list window," in Chapter 3, "Working with Project Files," to review.

---

# Viewing a test configuration

To view a test configuration:

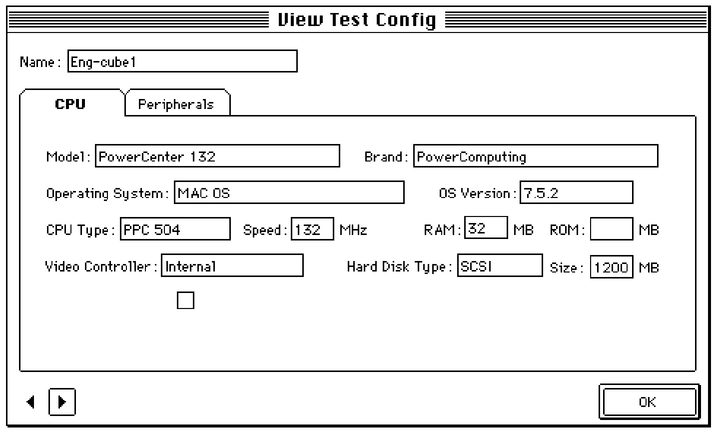
**1 Select the test configuration you want to view from the Test Configurations list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Tip** If the **View** button is bold, **double-click** the test configuration to select it and open the View Test Config dialog box at the same time. You can set this preference in the Preferences dialog box.

**2 Choose View Test Config from the Edit menu, or click the View button on the Test Configurations list window.**

The View Test Config dialog box appears.




**Tip** When viewing or editing a test configuration, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the test configurations.

**3 Choose OK when you're finished.**

You return to the Test Configurations list window.

# Changing a test configuration

To change a test configuration:

**1 Select the test configuration you want to change from the Test Configurations list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

---

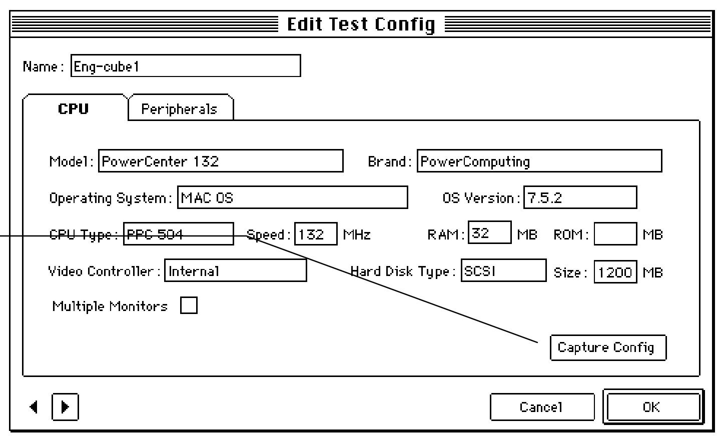
**Tip** If the **Edit** button is bold, **double-click** the user to select it and open the Edit Test Config dialog box at the same time. You can set this preference in the Preferences dialog box.

---

**2 Choose Edit Test Configs from the Edit menu, or click the Edit button on the Test Configurations list window.**

The Edit Test Config dialog box appears. Be sure to **click Capture Config** to have TestTrack update a few fields for you.

Click here to have TestTrack gather information for you.




---

**Tip** When viewing or editing a test configuration, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the test configurations.

---

**3 Make any changes.**

**4 Choose OK.**

You return to the Test Configurations list window. Your changes have been made.

# Deleting a test configuration

To delete a test configuration:

**1 Select the test configuration you want to delete from the Test Configurations list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**2 Choose Delete Test Config from the Edit menu, or click the Delete button on the Test Configurations list window.**

The test configuration is removed from the list window.

# 10 Working with Reports

## Contents



## Analyze and Report!

TestTrack makes reporting simple—point, click, print, and read. You can design each report and preview it before you print it. If you are in a multi-user project file, you can share your report with others, or you can keep it private.

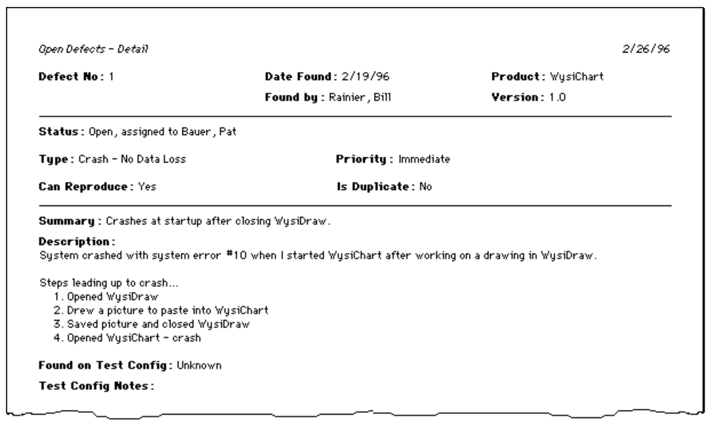
This chapter explains how to add, change, view delete, preview and print reports. The chapter starts with an explanation of the kinds of reports you can create.

# About reports

Reports let you analyze the data you’ve entered in your project file. You can use the filters you’ve already created to focus the report on data important to you. If you’re working in a multi-user project file, you can share your reports with others, or you keep them private. You can create the following four kinds of reports:

**Detail report**

A detail report prints all the information about the items of interest. This could be a defect, user, user group, or test configuration. You control which items TestTrack reports on. The following is a sample detail report:



*Open Defects - Detail* *2/26/96*

**Defect No:** 1 **Date Found:** 2/19/96 **Product:** WysiChart

**Found by:** Rainier, Bill **Version:** 1.0

**Status:** Open, assigned to Bauer, Pat

**Type:** Crash - No Data Loss **Priority:** Immediate

**Can Reproduce:** Yes **Is Duplicate:** No

**Summary:** Crashes at startup after closing WysiDraw.

**Description:**
System crashed with system error #10 when I started WysiChart after working on a drawing in WysiDraw.

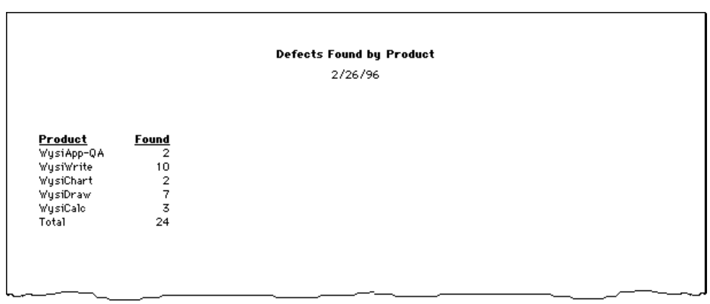
Steps leading up to crash...
1. Opened WysiDraw
2. Drew a picture to paste into WysiChart
3. Saved picture and closed WysiDraw
4. Opened WysiChart - crash

**Found on Test Config:** Unknown

**Test Config Notes:**

**Distribution report**

A distribution report prints the distribution of defects by user or test configuration. For example, for each user, show the defects assigned by priority or show the number of defects fixed. The following is a sample distribution report:



**Defects Found by Product**
2/26/96

| Product | Found |
|---|---|
| WysiApp-QA | 2 |
| WysiWrite | 10 |
| WysiChart | 2 |
| WysiDraw | 7 |
| WysiCalc | 3 |
| Total | 24 |

**List report**

A list report prints summary information about an item (defect, user, user group, or test configuration). You select the fields to include and their order in the report. This lets you see only the information important to you. The following is a sample list report:

*Defects that are pending verification* 2/26/96

| No. | Summary | Type | Fixed By |
|---|---|---|---|
| 13 | Refresh problem with text color in polygon. | Incorrect Functionality | Baughin, Frank |
| 19 | Refresh problem with text color in circle. | Incorrect Functionality | Baughin, Frank |

**Trend report**

A trend report prints defect events over time. For example, how many defects have been fixed this week? You can use this report to determine how well you are keeping up with the flow of defects—are you winning the war or losing it? The following is a sample trend report:

**Defect Status by Week**

2/26/96

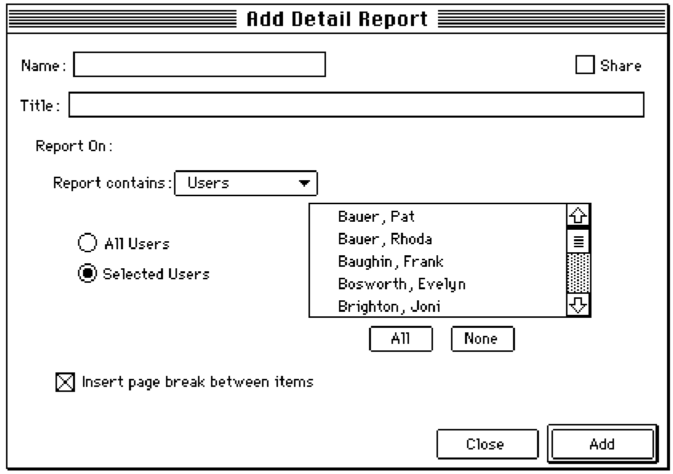
| Date | Open | Fixed | Verify Failed | Verify Passed | Closed | Re-opened |
|---|---|---|---|---|---|---|
| 2/19/96 | 1 | 0 | 0 | 0 | 0 | 0 |
| 2/20/96 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2/21/96 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2/22/96 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2/23/96 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2/24/96 | 23 | 3 | 0 | 0 | 0 | 0 |
| Total | 24 | 3 | 0 | 0 | 0 | 0 |

# Adding a detail report

To add a detail report:

**1 Choose Detail from Report on the Create menu.**

The Add Detail Report dialog box appears.




**Note** You may also click the **Add** button on the Reports window. The Create Report dialog box appears.

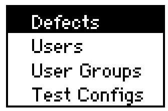

Choose **Detail** from the pop-up menu and click **OK**. The Add Detail Report dialog box appears.

**2 Enter a Name and Title for the report.**

The Title appears on the report.

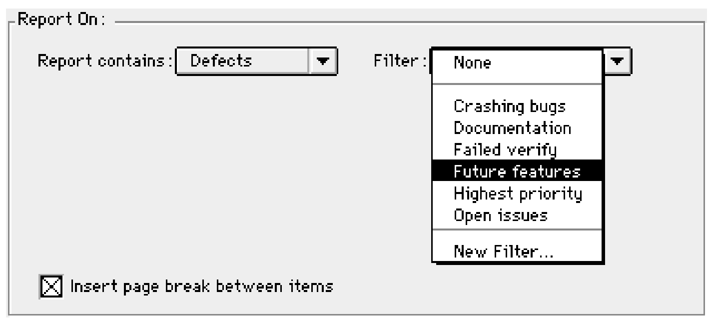
**Note** If you are in a **multi-user** project file, select the **Share** check box if you want to share this report with others. If you want this report to remain **private**, do not select the check box. Shared reports appear in other users' Reports list window—private reports do not.

**3 Select what you want to report on from the Report Contains pop-up menu.**




The following explains your choices:

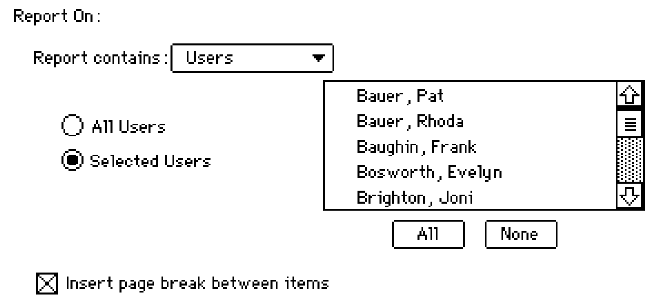
**Defects** If you select **Defects**, you may also select a filter from the Filter pop-up menu.



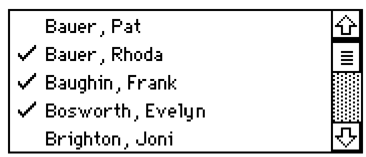

**Users**
**User Groups**
**Customers**
**Test Configs**

If you choose **Users**, **User Groups, Customers**, or **Test Configs**, radio buttons appear:

Choose **All Users** to report on all the users in the project file. Choose **Selected Users** to select specific users. When you choose Selected Users, a list box appears.




Select those users you want in the report. A **check mark** appears beside the name. To deselect a user, click on the check mark (it toggles off).




---

**Note** Choose the **Insert Page Break** check box if you want page breaks between each item in the report.

---

**4 Choose Add.**

The dialog box clears and you're ready to add another report. If you're finished, choose **Cancel**.

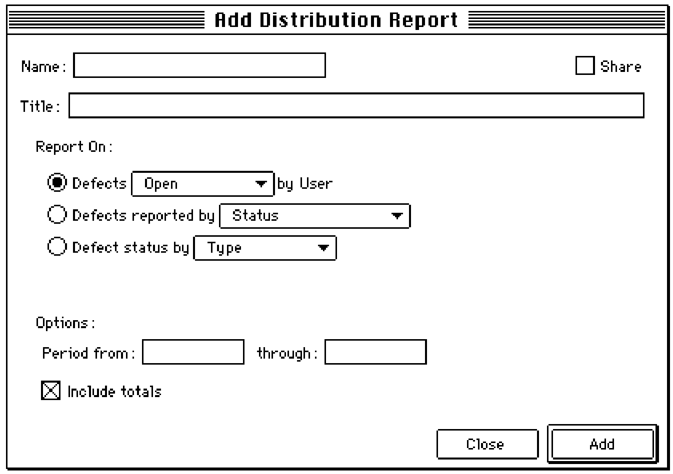
The report appears in the Reports window. From the Reports window you can preview or print the report. See "Previewing a report" or "Printing a report," later in this chapter, for instructions.

# Adding a distribution report

To add a distribution report:

**1 Choose Distribution from Report on the Create menu.**

The Add Distribution Report dialog box appears.




**Note** You may also click the **Add** button on the Reports window. The Create Report dialog box appears.


Choose **Distribution** from the pop-up menu and click **OK**. The Add Distribution Report dialog box appears.

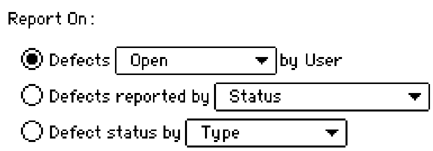
**2 Enter a Name and Title for the report.**

The Title appears on the report.

**Note** If you are in a **multi-user** project file, select the **Share** check box if you want to share this report with others. If you want this report to remain **private**, do not select the check box. Shared reports appear in other users' Reports list window—private reports do not.

**3 Select a option button in the Report On group box.**

Be sure to select an item from the pop-up menu.




**4 Enter the dates you want to report on in the Options group box.**

Use the following format to enter a date: **mm/dd/yy**

**Note** Also select the check box if you want to include totals.

**5 Choose Add.**

The dialog box clears and you're ready to add another report. If you're finished, choose **Close**.

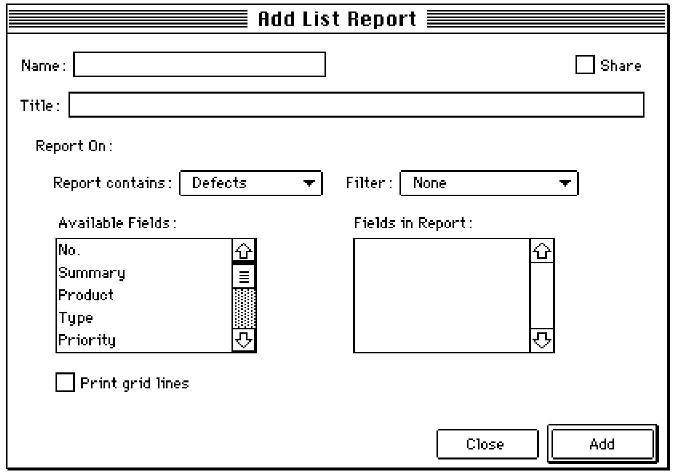
The report appears in the Reports window. From the Reports window you can preview or print the report. See "Previewing a report" or "Printing a report," later in this chapter, for instructions.

# Adding a list report

To add a list report:

**1 Choose List from Report on the Create menu.**

The Add List Report dialog box appears.




**Note** You may also click the **Add** button on the Reports window. The Create Report dialog box appears.


Choose **List** from the pop-up menu and click **OK**. The Add List Report dialog box appears.

**2 Enter a Name and Title for the report.**

The Title appears on the report.

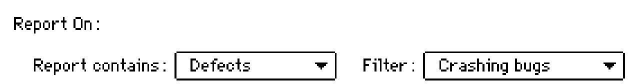
---

**Note** If you are in a **multi-user** project file, select the **Share** check box if you want to share this report with others. If you want this report to remain **private**, do not select the check box. Shared reports appear in other users' Reports list window—private reports do not.

---

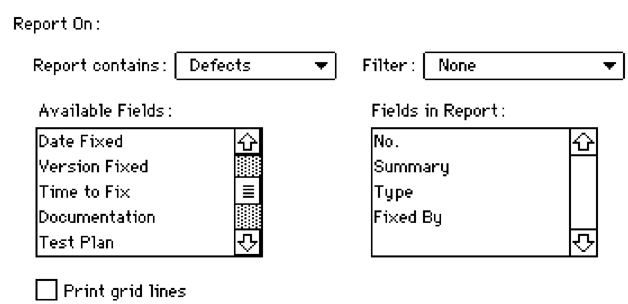
**3 Select what you want to report on from the Report Contains pop-up menu.**

If you select **Defects**, you may also select a filter from the **Filter** pop-up menu.

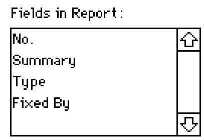



**4 Select a field you want in the report from the Available Fields list box, and click the >> Add >> button.**

The field appears in the **Fields in Report** list box. You may add as many fields as you wish.



**Note** The order the fields appear in the **Fields in Report** list box, is the order they appear in the report. TestTrack sorts by the first field in the list.




| No. | Summary | Type | Fixed By |
|---|---|---|---|
| 13 | Refresh problem with text color in polygon. | Incorrect Functionality | Baughin, Frank |
| 19 | Refresh problem with text color in circle. | Incorrect Functionality | Baughin, Frank |

If you need to move a field to a new position in the list: select the name and click the **Up** or **Down** button. If you need to remove a field from the list: select the field and click the **Remove** button.

**5 Select the Print grid lines check box if you want grid lines in your report.**

**6 Choose Add.**

The dialog box clears and you're ready to add another report. When you're finished, choose **Cancel**.

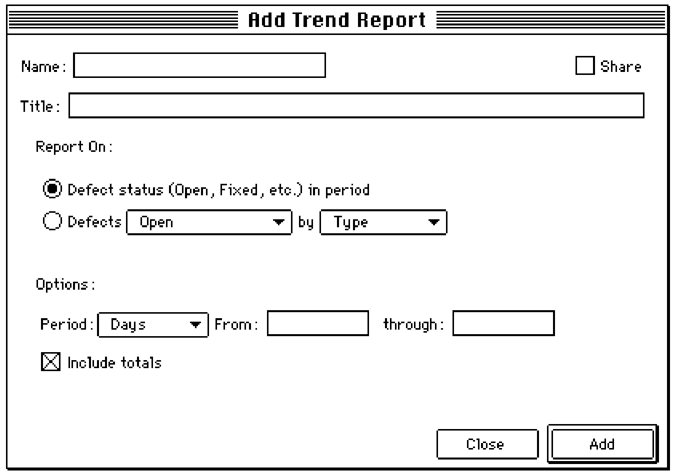
The report appears in the Reports window. From the Reports window you can preview or print the report. See "Previewing a report" or "Printing a report," later in this chapter, for instructions.

## Adding a trend report

To add a trend report:

**1 Choose Trend from Report on the Create menu.**

The Add Trend Report dialog box appears.




**Note** You may also click the **Add** button on the Reports window. The Create Report dialog box appears.


Choose **Trend** from the pop-up menu and click **OK**. The Add Trend Report dialog box appears.

**2** **Enter a Name and Title for the report.**

The Title appears on the report.

---

**Note** If you are in a **multi-user** project file, select the **Share** check box if you want to share this report with others. If you want this report to remain **private**, do not select the check box. Shared reports appear in other users' Reports list window—private reports do not.

---

**3** **Select a radio button in the Report On group box.**

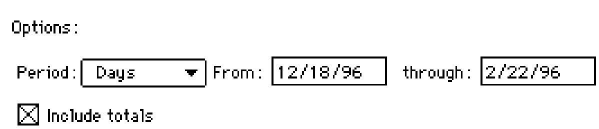
The following explains your choices:

**Defect status in period** Select this radio button to report the number of defects in each state (Open, Fixed, etc.) over the specified reporting period.

**Defects...by...** Select this radio button to report on the number of defects that are Open, Fixed, Closed, etc. by their Type, Priority, or Resolution. Be sure to select an item from each pop-up menu.


**4** **Enter the dates you want to report on in the Options group box.**

Select the period from the pop-up menu. Use the following format to enter a date: **mm/dd/yy**




---

**Note** Select the **Include Totals** check box if you want the report to include totals.

---

**5 Choose Add.**

The dialog box clears and you're ready to add another report. When you're finished, choose **Cancel**.

The report appears in the Reports window. From the Reports window you can preview or print the report. See "Previewing a report" or "Printing a report," later in this chapter, for instructions.

## Viewing a report's settings

To view report settings:

**1 Select the report from the Reports window.**

To select a range of reports, **click** the first item in the range, then **shift-click** the last item. To select multiple reports not in a range, **command-click** each report.

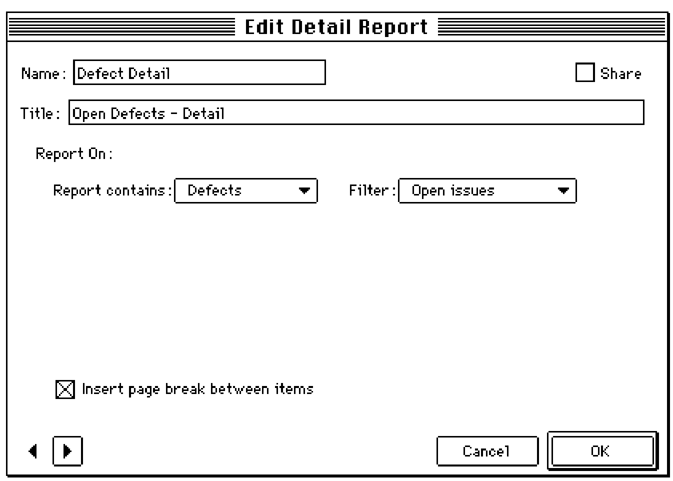
---

**Tip** If the **View** button is bold, **double-click** the report to select it and open the View Report dialog box at the same time. You can set this preference in the Preferences dialog box.

---

**2 Choose View.**

The View Report dialog box appears. When you're finished, choose **OK**.



**Note** When viewing a report, **next** and **previous arrows** appear at the bottom of the dialog box. Click the arrows to page through the reports.

## Changing a report

To change a report:

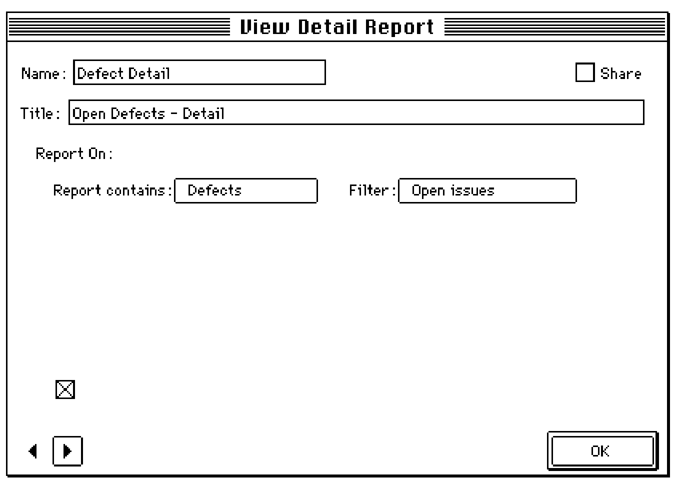
1 **Select the report from the Reports window.**

To select a range of reports, **click** the first item in the range, then **shift-click** the last item. To select multiple reports not in a range, **command-click** each report.

**Tip** If the **Edit** button is bold, **double-click** the report to select it and open the Edit Report dialog box at the same time. You can set this preference in the Preferences dialog box.

2 **Choose Edit.**

The Edit Report dialog box appears.



**3 Make any changes.**

**Note** When editing a report, **next** and **previous arrows** appear at the bottom of the dialog box. Click the arrows to page through the reports.

**4 Choose OK.**

The dialog box closes.

# Deleting a report

To delete a report:

**1 Select the report from the Reports window.**

To select a range of reports, **click** the first item in the range, then **shift-click** the last item. To select multiple reports not in a range, **command-click** each report.

**2 Choose Delete.**

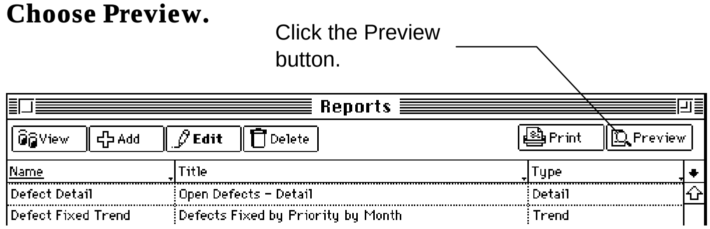
The Report is deleted.

# Previewing a report

To preview a report:

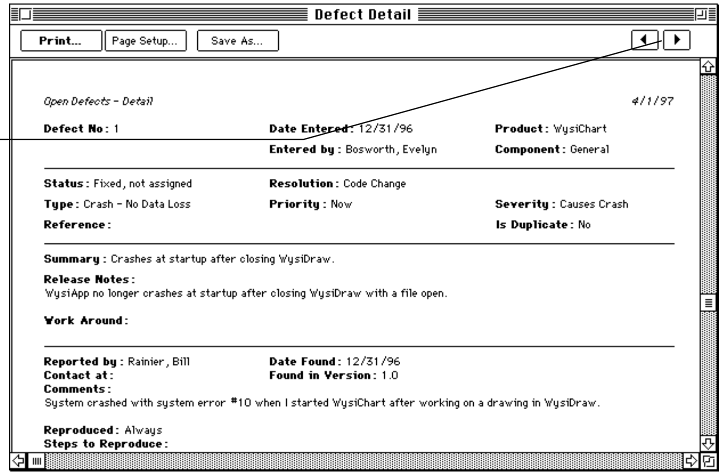
**1 Select the report from the Reports list window.**

**2 Choose Preview.**



The report appears. To page through the report, click the **Next** and **Previous arrow** buttons or use the scroll bar.

Click the arrows to page through the report.




**Note** You can set the font used in the reports in the Preferences dialog box. See “Setting preferences” in Chapter 3, “Working with Project Files,” for instructions.

**3 Choose Print or Page Setup.**

The following explains your choices:

**Print** To print the report, click the **Print** button. The Printer dialog box appears. Make your selections and choose **Print** again.

**Page Setup** To change the page setup, click the **Page Setup** button. The Setup dialog box appears. Make any changes and choose **OK**.

When you’re satisfied with the preview, click **Print**. The Printer dialog box appears. Choose your settings and click **Print** again.

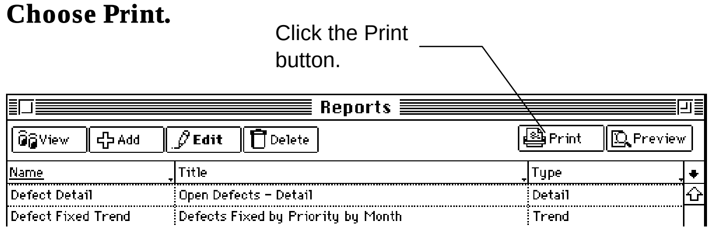
**Save As** To save the report as a text file, click the **Save As** button. The Save Report As dialog box appears. TestTrack assigns the title of the report as the file name, you can accept this name or type a new name. Click **Save**.

# Printing a report

To print a report:

**1 Select the report from the Reports list window.**

**2 Choose Print.**




The Printer dialog box appears.

**3 Make your selections and choose Print.**

The report prints.

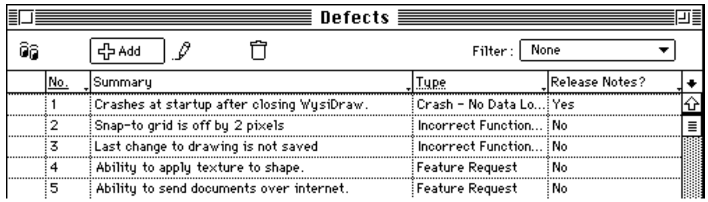
**Note** You can set the font used in the reports in the Preferences dialog box. See “Setting preferences” in Chapter 3, “Working with Project Files,” for instructions.

# Generating release notes

TestTrack lets you generate a text file containing all the release notes you’ve entered for any of the defects. You may want to include the text file in a read-me file for a particular release of your software, or load it into a desktop publisher and create a formatted document.

Before you can generate a text file containing your release notes, you must add them to the defects they affect. See “Adding release notes to a defect,” in Chapter 4, “Working with Defects,” for instructions.

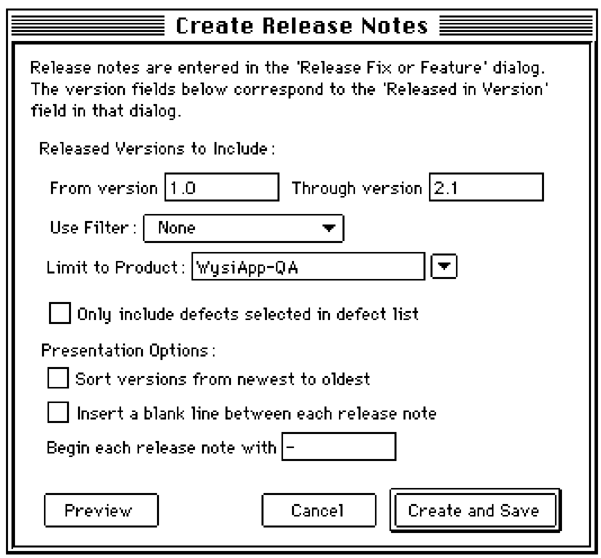
**Note** If you want to generate release notes for just a **few defects**, select those defects from the Defects list window now. If you're unsure which defects contain release notes, make a column in the Defects list window to display the Release Notes? Field. Any defect containing release notes will have a "Yes" in the column. Those that do not will have a "No."




To generate release notes:

**1 Choose Create Release Notes from the Activities menu.**

The Create Release Notes dialog box appears.



**2 Fill in the fields in the Released Versions to Include group box.**

The following explains the fields:

**From Version** Enter the first version you want included in the release notes.

**Through Version** Enter the last version you want included in the release notes. If the release notes are specific to one version, enter the same version number in both of these fields.

**Use Filter** Select a filter from the pop-up menu, or leave the field blank if you want release notes pulled from all the defects.

**Limit to Product** Select a product name from the pop-up menu, or leave the field blank if you want release notes pulled from the defects in all the products.

**Selected Defects check box** Select this check box if you want to pull release notes only from those defects you selected in the Defects list window.

**3 Fill in the fields in the Presentation Options group box.**

**Sort By check box** Select this check box if you want TestTrack to output the versions from newest to oldest.

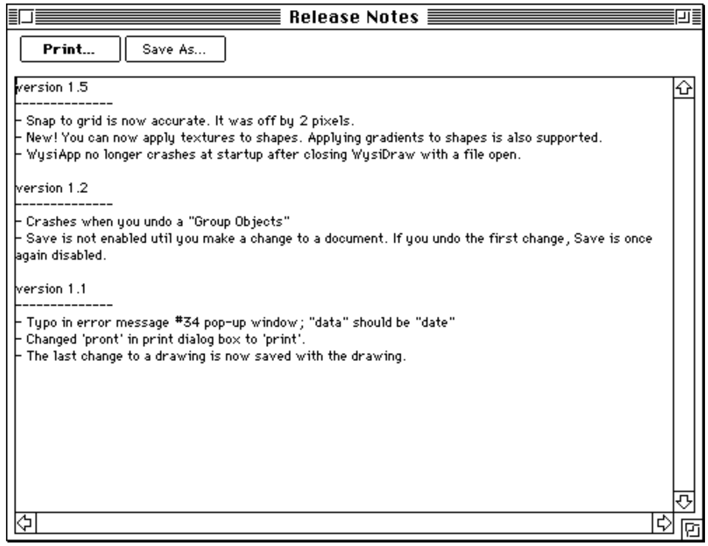
**Blank Line check box** Select this check box if you want TestTrack to insert a blank line between each release note.

If you're going to keep this file as a simple text file, inserting a blank line will enhance readability; but if you're going to load this text file into a desktop publishing program, it's best not to insert the blank line.

**Bullet Style check box** Enter the character and any spaces or tabs you want placed in front of each release note (e.g., a bullet "•"). You can also enter ASCII characters or leave the box blank.

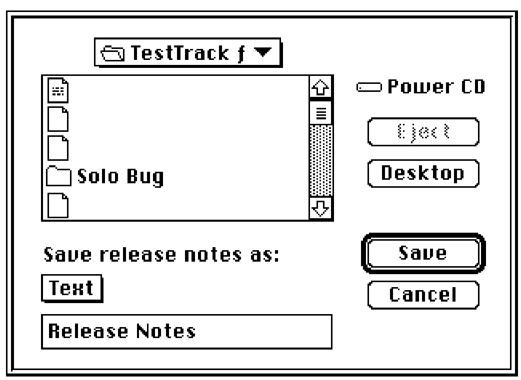
**4 Click Preview.**

It’s always a good idea to preview the release notes, because you can edit them in the preview window before saving them; but if you don’t want to preview, click **Create and Save** and skip to step 6.




**5 Click Save As.**

The Save Release Notes As dialog box appears.



6 **Type a name and check the directory.**

By default, the file TestTrack generates is a text file. If you have XTND translators installed, you can select an alternative file format.

7 **Click Save.**

TestTrack generates the release notes and places the file in the directory you specified.

# 11 Working with the Workbook

## Contents



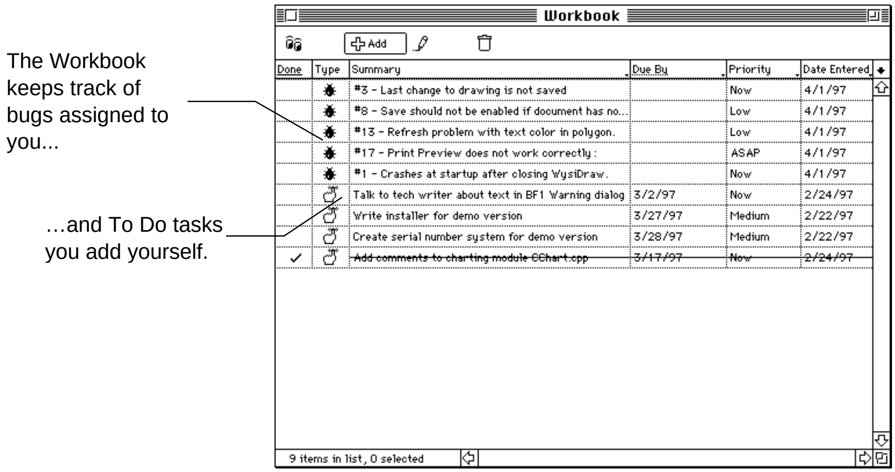
## So much To Do!

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

This chapter explains how to add, change, view and delete To Do tasks. The chapter starts with an explanation of the Workbook and what a To Do task is.

# About the Workbook

The TestTrack Workbook is a catch all to help you keep track of those defects assigned to you, loose ends, and things that are not really bugs, but which are important to you and still need to be tracked.




## Understanding Workbook tasks

TestTrack keeps track of two kinds of tasks in the Workbook list window:

**Defects tasks** Those defects assigned to you. **TestTrack adds** these tasks automatically to the list from the Defects lists window.

**To Do tasks** Those project-related tasks or loose ends **you add** to the list.

## Looking at the task indicators

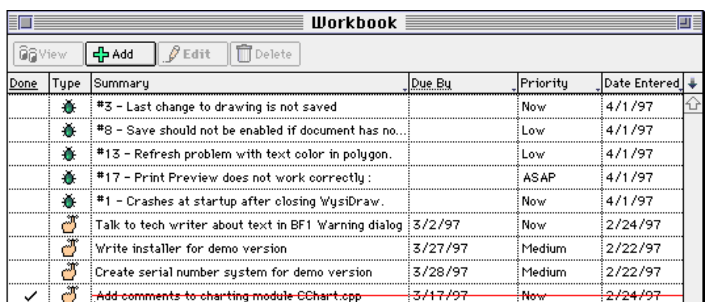
**Task indicators** appear in the first column of the Workbook list window. They point out your assigned defects, closed defects, and To Do tasks you've added to the list. The following shows a sample of each indicator:

The **Defect** indicator points out any defects assigned to you.

The **Closed Defect** indicator points out any of your closed defects or completed tasks.

The **To Do** task indicator points out any tasks you have added to the list.

**Note** Notice that the closed task has a red line drawn through it. You can set this option in the Preferences dialog box. This is the **same option** used for a **defect**. See "Setting preferences" in Chapter 3, "Working with Project Files."



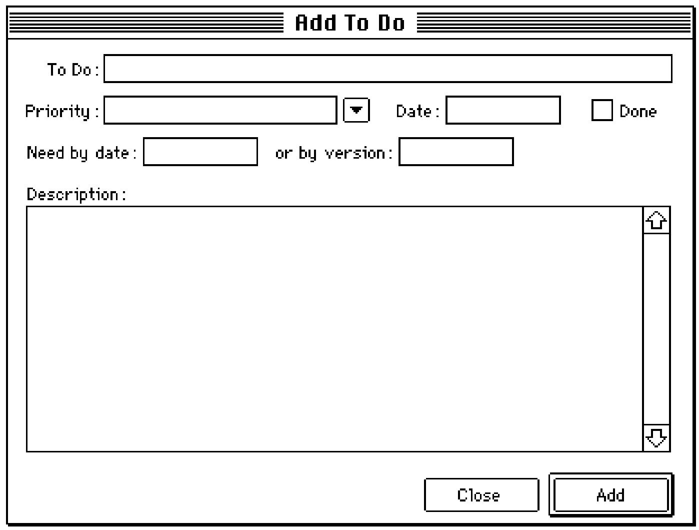

The closed defect has a red line drawn through it.

# Adding a To Do task

To add a To Do task:

**1 Choose To Do from the Create menu, or click the Add button on the Workbook list window.**

The Add To Do dialog box appears.




**2 Enter the To Do task.**

Make this a brief description. You can add a detailed description in the Description box below.

**3 Select the task's priority from the Priority pop-up menu (optional step).**

TestTrack comes with default values. You may use these, or you may customize them. These are the **same values** you used for a **defect**. See "Configuring field values" in Chapter 3, "Working with Project Files," if you want to change or add values.

**4 Check the date (optional step).**

Today's date appears automatically in this field. You may enter a different date now it you want.

5 **Enter either the date or the version you need the task completed by (optional step).**

6 **Enter a detailed description of the task (optional step).**

7 **Choose Add.**

The Add To Do dialog box clears and you're ready to add the next task. When you're finished, choose **Close**.

---

**Tip** The task appears in the Workbook list window. The tasks are sorted by field; you can sort on any field—just click on the column heading. You can also add more columns or change the sort order. See "Using a list window," in Chapter 3, "Working with Project Files," to review.

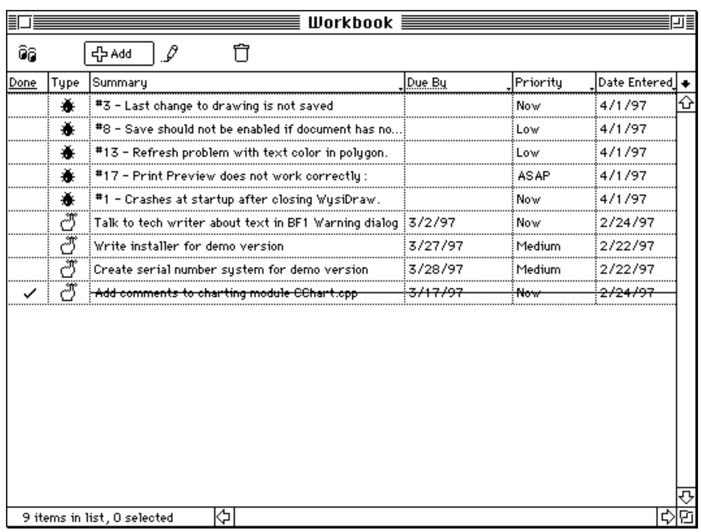
---

# Viewing a To Do task

To view a To Do task:

1 **Open the Workbook list window.**

All the tasks appear in the list window.



**2 Select the task you want to view.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

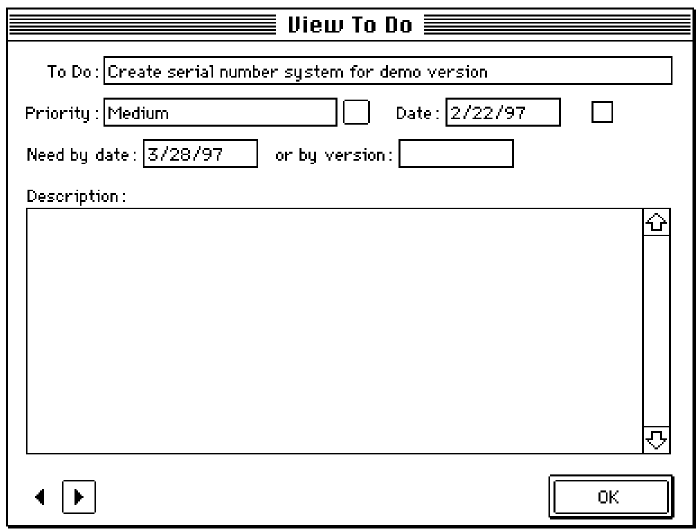
---

**Tip** If the **View** button is bold, **double-click** the task to select it and open the View To Do dialog box at the same time. You can set this option in the Preferences dialog box.

---

**3 Choose View Task from the Edit menu, or click the View button on the Workbook list window.**

The View To Do dialog box appears.




---

**Tip** When viewing or editing tasks, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the tasks.

---

**4 Choose OK when you're finished.**

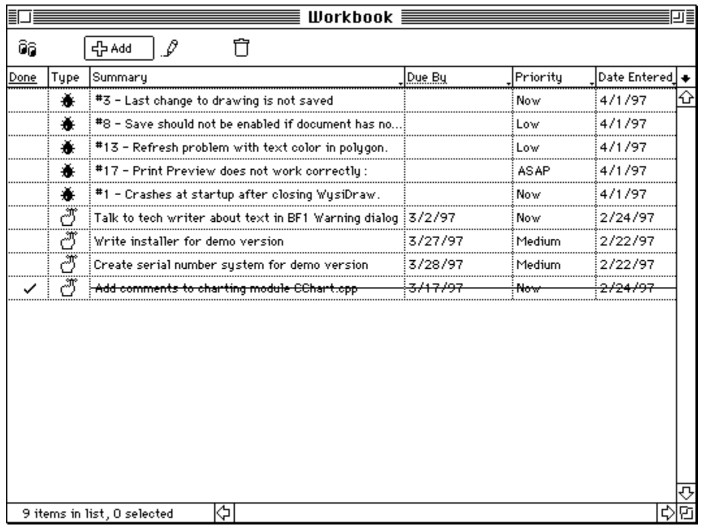
You return to the Workbook list window.

# Changing a To Do task

To change a To Do task:

**1 Open the Workbook list window.**

All the tasks appear in the list window.




**2 Select the task you want to change.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

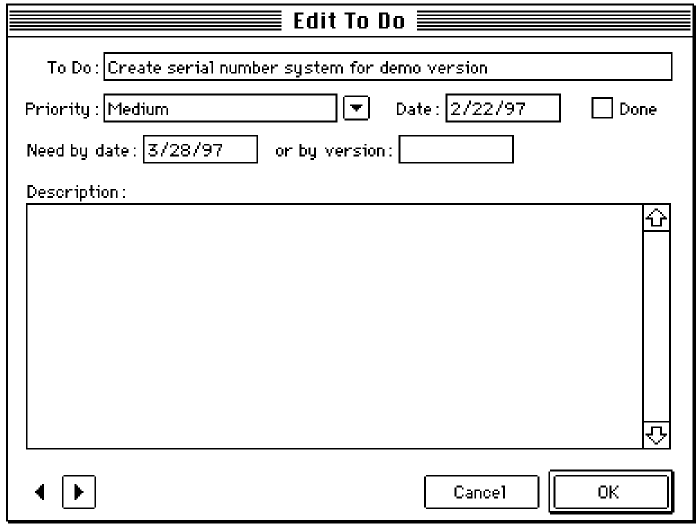
---

**Note** If the **Edit** button is bold, **double-click** the task to select it and open the Edit To Do dialog box at the same time. You can set this option in the Preferences dialog box.

---

**3 Choose Edit Task from the Edit menu, or click the Edit button on the Workbook list window.**

The Edit To Do dialog box appears.




**Tip** When viewing or editing tasks, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the tasks.

**4 Make any changes.**

**5 Choose OK.**

You return to the Workbook list window. Your changes have been made.

# Deleting a To Do task

To delete a To Do task:

**1 Open the Workbook list window.**

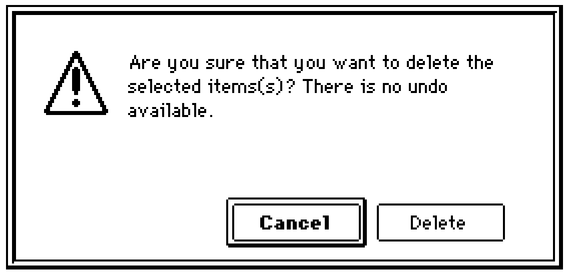
**2 Select the To Do task you want to delete from the Workbook list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

**Note** You only may delete **To Do tasks** you have added to the list. You cannot delete bugs assigned to you.

**3 Choose Delete Task from the Edit menu, or click the Delete button on the Workbook list window.**

A message appears asking you to confirm the deletion.




**4 Choose OK.**

The To Do task is removed from the Workbook list window.

# 12 Working with Solo Bug

## Contents



## There must be a better way!

How many times have you thought this when trying to decipher a hand-written bug report or voice mail message from a customer. Well, now there is! Solo Bug relieves you of this tedious task and the hassle of data entry by allowing you to import bug reports sent to you by your customers.

This chapter explains how to customize the Solo Bug application for distribution and load a Solo Bug file manually and automatically.

# About Solo Bug

Solo Bug is a stand-alone bug reporter that dramatically simplifies the way you receive bug reports from your customers.

Solo Bug:

- simplifies bug reporting for your customers
- eliminates data entry of bug reports from your customers
- allows your customers to include file attachments with their bug reports
- allows you to limit customers to your bug reporting terminology
- captures your customers' personal information and computer information

## How do I distribute Solo Bug?

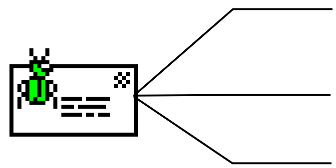
You may distribute Solo Bug 1.1 to all of your customers and beta sites. Refer to the Solo Bug license included with TestTrack 1.6 for rules governing distribution of Solo Bug applications. Solo Bug is available for Macintosh, Windows 3.1, and Windows 95 / NT.

Solo Bug comes with a small user's guide you may edit, print, copy, and distribute with Solo Bug. Solo Bug for Macintosh implements balloon help so it is not essential to distribute a manual with it. Every topic in the guide also appears in the online Help for the Windows version, so it is not imperative to distribute the hard copy with Solo Bug for Windows. You may however, want to customize the guide to include your company's name, e-mail destinations, URLs, etc.

Before you distribute Solo Bug to your customers and beta sites, you should customize the field values to match your bug reporting terminology. See "Customizing the Solo Bug application" for instructions.

## What is a Solo Bug file?

A Solo Bug file contains a single bug report (or feature request) created by your customers and beta sites in the Solo Bug application. Your customers simply e-mail the file to you, which you can then import into any TestTrack project file. A Solo Bug file contains:




## How do I import a Solo Bug file?

You can import Solo Bug files two ways:

- Load the files manually into TestTrack by either selecting them from a dialog box, or by simply "dragging and dropping" them on the Defects list window. See "Loading a Solo Bug file manually" for instructions.

- Activate the auto-load feature and have TestTrack import the files automatically at regularly defined intervals. See "Activating the Solo Bug file auto-load feature" for instructions

# Customizing the Solo Bug application

Before you distribute Solo Bug to your customers, you should customize the field values to match your bug reporting terminology.

**Note** During customization, TestTrack modifies the Solo Bug application; therefore, before you customize Solo Bug, you should make a backup of the original.

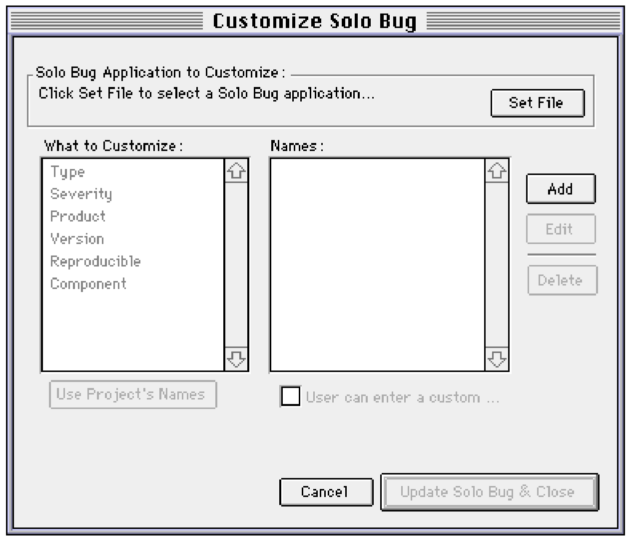
To customize the Solo Bug application:

**1 Start TestTrack and select the project file you want Solo Bug to match.**

You can pull all the field values from the project file and save time entering them yourself.

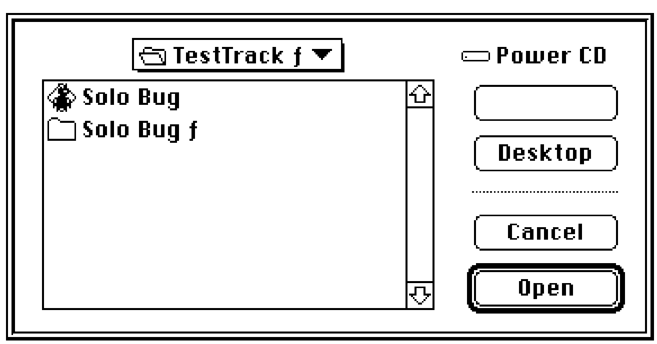
**2 Choose Customize Solo Bug from Configure on the Activities menu.**

The Customize Solo Bug dialog box appears.




**3 Click Set File.**

The Open Solo Bug Application dialog box appears.



**4 Select a Solo Bug executable.**

You may choose from any of the following:

**Solo Bug** Select this executable if you're customizing an executable to run on a Macintosh.

**solobug.exe** Select this executable if you're customizing an executable to run under Windows 95 / NT.

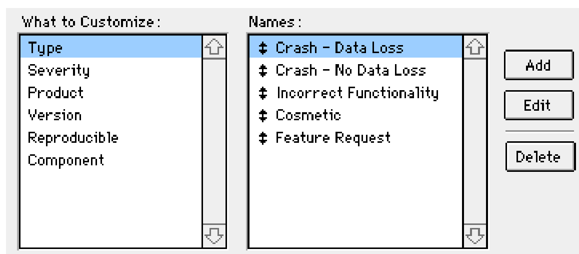
**solow31.exe** Select this executable if you're customizing an executable to run under Windows 3.1

**5 Click Open.**

You return to the Customize Solo Bug dialog box. All the controls are now enabled.

**6 Select a field from the What to customize list box.**

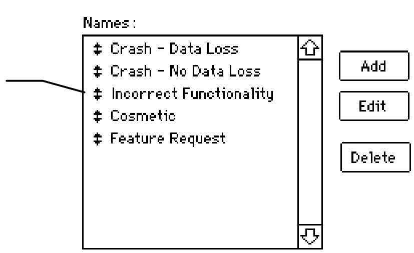
The default field values appear in the Names list box.




**7 Customize the field values for the selected field.**

You can add, edit, or delete any field value. To change the order the field values are listed in: click on the arrow beside the field value and drag it to a new position.

Drag the double arrows to reorder the field



**8 Select the remaining options for the selected field.**

The following explains the options:

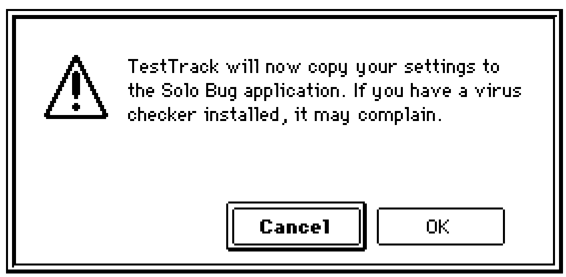
**Use Project's Names** Click this button to use all the field values in the current project file.

**User can enter custom types** Check this box to if you want the customer to be able to enter his or her own field values for the selected field. This option is most advantageous for the Version and Product fields. Notice that this option is selected for these fields in the default Solo Bug executable.

**9 Repeat steps 6, 7 and 8 for all the fields in the What to customize list box.**

**10 Click Update Solo Bug & Close.**

TestTrack modifies the Solo Bug executable. The following message appears:




**11 Click OK.**

You are now ready to distribute your Solo Bug executable to your customers. Solo Bug comes with online Help plus a user's quick start guide you can print and distribute also.

# Loading Solo Bug files manually

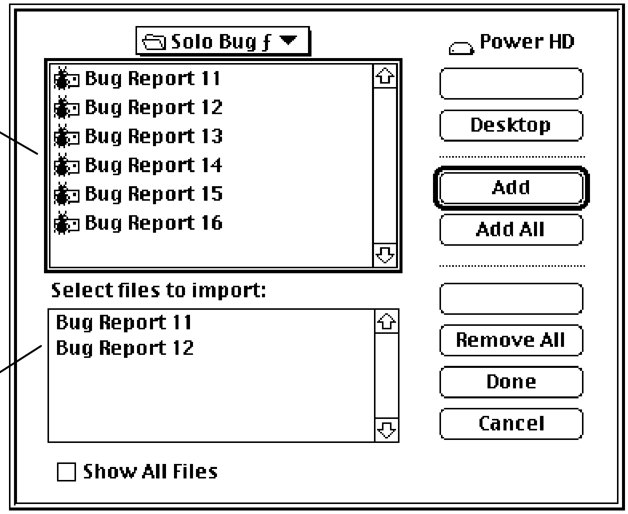
To load Solo Bug files manually:

**1 Choose Load Solo Bug Files from Import on the File menu.**

The Solo Bug Files to Import dialog box appears.

Select a file to import here, then click Add to add it to the list below.

This list box lists which files will be imported when you click Done.



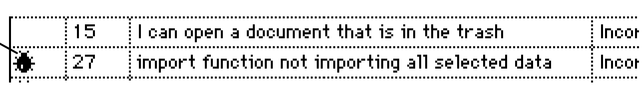

**2 Click Show All Files if you want to see Solo Bug files whose Type and Creator are not set properly.**

**3 Add the Solo Bug files you want to import to the Select Files to Import list box.**

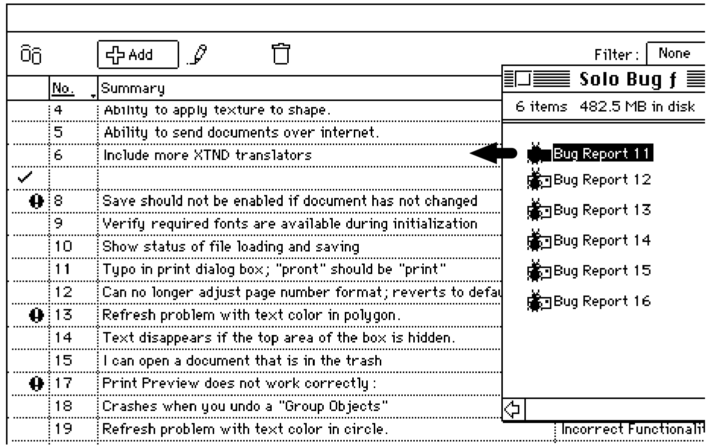
**4 Click Done.**

The defect report appears in the Defects list window at the end of the list. Notice the new defect icon appears beside it.

This is the new defect.



**Tip** As a shortcut, to bypass the menu selection and the dialog box, simply “**drag and drop**” the Solo Bug file on the Defects list window.




Notice that when you drag a file from a folder to the Defects list window, the cursor becomes a plus sign.

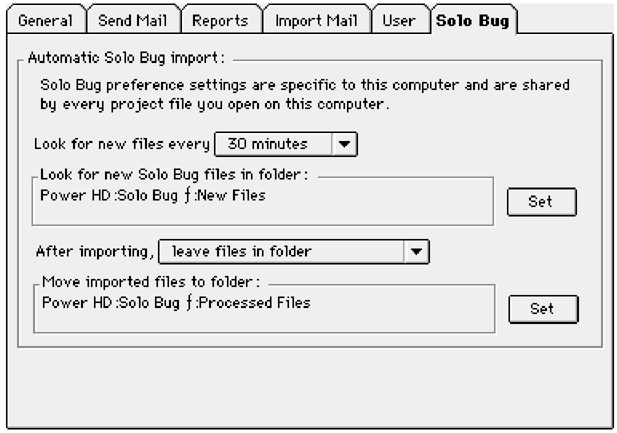
# Activating the Solo Bug file auto-load feature

To set up the auto-load feature to have TestTrack import Solo Bug files automatically at regularly defined intervals:

**1 Choose Preferences from the Edit menu.**

The Preferences dialog box appears.

**2** **Click the Solo Bug tab.**




**3** **Select the interval you want TestTrack to look for new Solo Bug files from the “Look for new files every” pop-up menu.**

Selecting a frequent update interval will not inhibit TestTrack performance.

---

**Note** If you select a long interval between updates, you can always override it and update your Defects list window immediately by **choosing Auto Load Solo Bug Files from Import on the File menu**.

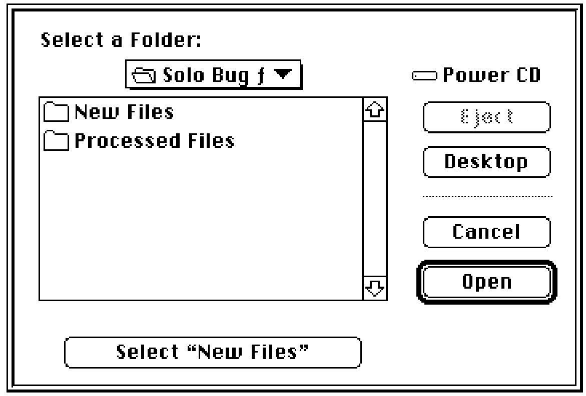
---

**4** **Select the directory you want TestTrack to look in for the Solo Bug files.**

You may keep the default directory, which is the directory TestTrack is running in, or select a new one.

To select a new directory:

1. **Click Set**. The Choose Directory dialog box appears.




2. Select the desired directory and **click the Select button**. You return to the Solo Bug tab.

---

**Note** You may want TestTrack to monitor you e-mail attachments directory.

---

**5** **Select what to do with the files after they’ve been imported from the After Importing pop-up menu.**

The following explains the preference:

**Leave files in directory** After importing, this preference tells TestTrack to leave the Solo Bug files in the directory. Even though the files remain in the directory, they are only imported once.

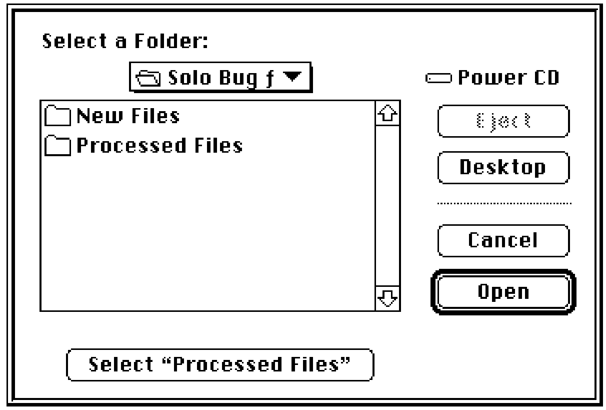
**Move files to another directory** After importing, this preference tells TestTrack to move the Solo Bog files to another directory. You specify the directory in the next step.

**Delete files** After importing, this preference tells TestTrack to delete the Solo Bug files.

**6 If you selected "Move files to another directory," select that directory now.**

To select a new directory:

1. **Click Set**. The Choose Directory dialog box appears.




2. Select the desired directory and **click the Select button**. You return to the Solo Bug tab.

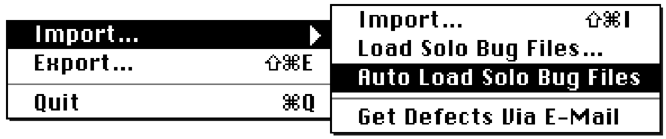
# Loading Solo Bug files automatically

To load Solo Bug files automatically, you must set up the auto-load feature in the Preferences dialog box. See "Activating the Solo Bug file auto-load feature," previous, if you have not done so already.

When you set up the auto-load feature, you select the interval you want TestTrack to look for new Solo Bug files; however, you can override this update interval at any time.

To override the update interval and load any new Solo Bug files immediately:

**Choose Auto Load Solo Bug Files from Import on the File menu.**




The defect report appears in the Defects list window at the end of the list. Notice the new defect icon appears beside it.

# Customizing the Solo Bug user's guide

Solo Bug comes with a small user's guide you may edit, print, copy, and distribute with Solo Bug. **Every topic** in the guide appears in the **online Help**, so it is not imperative to distribute the hard copy with Solo Bug. You may however, want to customize the guide to include your company's name, e-mail destinations, URLs, etc.

**Note** Before you customize the Solo Bug user's guide, you may want to make a backup of the original.

The following explains the Solo Bug user's guide files:

**solobug.doc** The Solo Bug user's guide in in Word 6.0 format. The file is located in the TestTrack folder.

**solobug.pdf** The Solo Bug user's guide in Adobe Acrobat format. The file is located in the TestTrack folder.

**solobug.hlp** The Solo Bug online help for Windows. **You cannot customize the online help that comes with Solo Bug**.

# 13 Working with E-mail Notifications

## Contents



## E-mail notifications keep you up to date!

Now you can keep track of changed and new bugs through e-mail. If something new is assigned to you or a bug changes, you know right away.

This chapter explains how to set up e-mail notifications to best meet your needs.

# About e-mail notifications

TestTrack lets you send and receive e-mail notifications via the Simple Mail Transport Protocol (SMTP) e-mail system. You can set up TestTrack to automatically notify you when:

- a defect is **assigned** to you
- a defect is **added** to the database
- a defect **changes**

In addition, each defect has a Notify tab that lets you add the users and customers who should receive e-mail notifications whenever that defect changes. TestTrack also has Send Mail and Reply to Submitter commands that let you send free-form e-mail to one or more users or customers.

TestTrack queues mail to send and will either send it right away when you close a defect window or send it in the background. When TestTrack is sending e-mail in the background, a small envelop appears to the right of the process icon on the menu bar.

If for some reason some mail has not been sent when you close the project file, TestTrack saves the mail queues to your hard disk drive. The next time you start TestTrack, it re-loads the mail queues and continues sending the mail.

Finally, TestTrack allows you to customize the contents of each type of e-mail notification message and comes with e-mail message templates.

# Configuring e-mail notifications

Setting up e-mail notifications in TestTrack is easy. First configure the Send Mail options, then make sure each user who wants to receive e-mail notifications has a valid e-mail address specified in his or her user account.

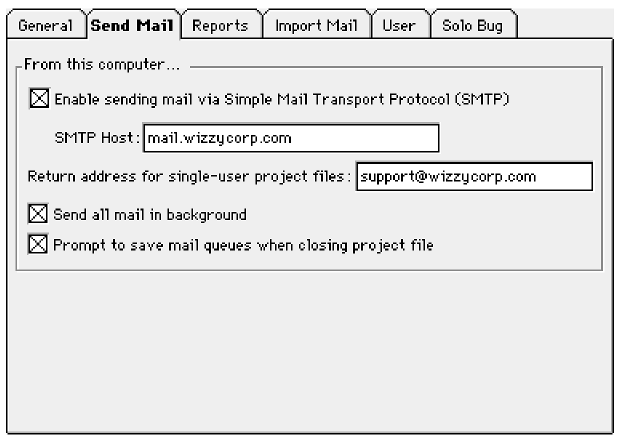
## Setting Send Mail options

To access the Options dialog box and complete the Send Mail tab:

1. **Choose Options from the Edit menu.**

   The Options dialog box appears.

2 **Click the Send Mail tab and select the e-mail options.**




The following describes the options:

**Send SMTP mail** Click the check box if you want to enable sending e-mail via Simple Mail Transport Protocol (SMTP). SMTP is the standard used to send e-mail over the Internet. Enter the SMTP host address.

**Return address for single-user project files** Enter an e-mail address to use as your return address when sending e-mail from single-user project files. When sending e-mail from multi-user project files, the e-mail address defined in your user account is used.

**Send mail in background** Click the check box if you want all of your e-mail sent in the background.

**Prompt to save mail queues** Click the check box if you want TestTrack to prompt you to save any e-mail not sent when you close a project file. The mail is sent the next time you start TestTrack

3 **Click OK.**

Your new options take effect.

## Verifying user notification settings

Each user can determine the types of events that result in e-mail being sent to them. You can set these options on the User tab of the Options dialog box or the Mail tab on the Add/Edit user dialog.

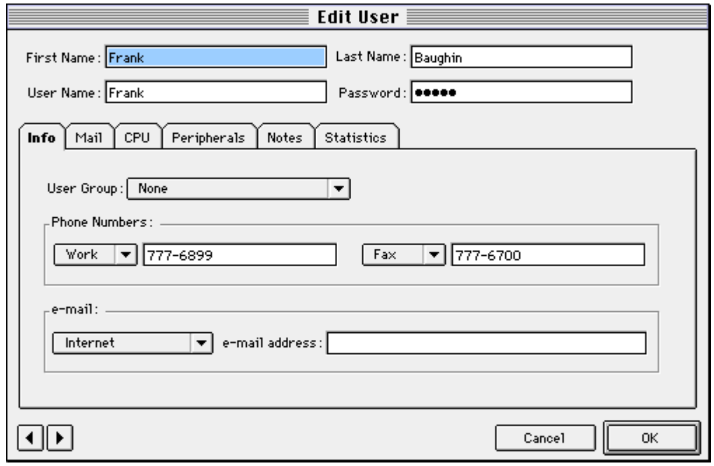
To verify each user's notification settings are set properly:

1 **Select the user you want to verify from the Users list window.**

You may select more than one. To select a range, **click** at the start item and **shift-click** at the end item. To select multiple items not in a range, **command-click** each item.

2 **Choose Edit Users from the Edit menu, or click the Edit button on the Users list window.**

The Edit User dialog box appears.




**Tip** When editing a user, **next** and **previous arrows** appear at the bottom of the dialog box. Click the **arrows** to page through the users.

3 **Review the Info tab.**

Verify the e-mail type field is set to the e-mail system through which the user will receive notifications and the e-mail address field contains the user's e-mail address.

4 **Click the Mail tab.**

Verify the various options are set up per the user's preferences.

- Click the **Defects are assigned to me** check box if the user wants to receive e-mail when defects are assigned to her/him.
- Click the **Any defect changes** check box if the user wants to receive e-mail whenever a defect is edited.

- Click the **New defects are added** check box if the user wants to receive e-mail when defects are added to the project file.

- Click the **Don't send me mail if I change or add a defect** check box if the user doesn't want to receive e-mail when it was that user who edited or added the defect.

**5 Choose OK.**

You return to the Users list window. Your changes have been made.

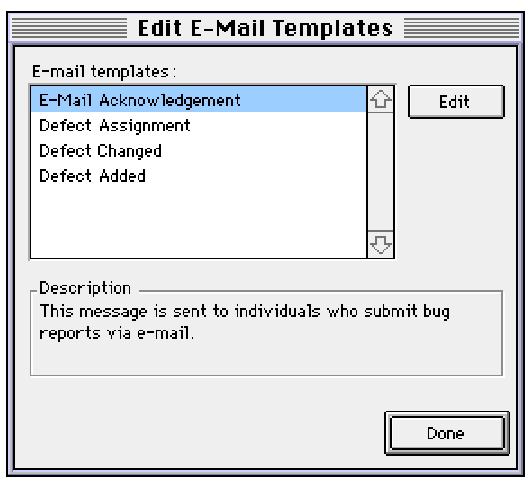
# Configuring e-mail message templates

TestTrack comes with four generic e-mail notification message templates which you can modify. E-mail message templates support **field codes**, sequences of characters that are replaced with TestTrack information when the e-mail message is sent.

To configure e-mail message templates:

**1 Choose E-Mail Message Templates from Configure on the Activities menu.**

The Edit E-Mail Templates dialog box appears.



**2 Select an e-mail template to edit.**

The following describes each template:

**E-Mail Acknowledgment** When a defect report is received via e-mail, this message is e-mailed back to the submitter to acknowledge the receipt of the defect.

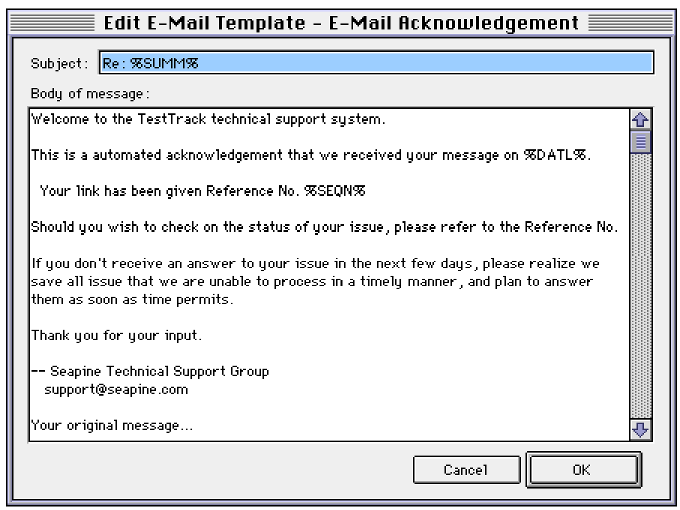
**Defect Assignment** When a defect is assigned to a user, this message is e-mailed to the user.

**Defect Changed** When a defect changes, this message is e-mailed to users who have requested defect change notifications.

**Defect Added** When a defect is added, this message is e-mailed to users who have requested defect addition notification.

**3 Choose Edit.**

The e-mail template dialog box appears.



**4 Edit the subject and message body fields.**

Enter a generic message you want to send to each user who receives e-mail notifications. Use field codes to create messages that are personalized by TestTrack before they are e-mailed. The subject and message body fields support field codes.

> **About Field Codes**
>
> E-mail templates support fields codes, sequences of letters enclosed in percent signs, that TestTrack replaces with information from the project file. For example, the sequence %DATS% is replaced with the current date in mm/dd/yy format, while the sequence %DNUM% is replaced with a defect number.
>
> Each e-mail notification corresponds to a single defect. You use field codes to build personalized e-mail messages the provide information specific to the defect that triggered the notification.
>
> See Appendix A, “Field Codes,” for a complete list of field codes supported by TestTrack.

**5 Choose OK.**

The e-mail template is saved and the dialog box disappears. You return to the list of e-mail templates.

**6 Choose Done.**

## Sending e-mail in the background

TestTrack can send e-mail either immediately or in the background. You control this feature in the Send Mail tab of the Options dialog box. When e-mail is sent immediately, you must wait for the mail to be sent before you can continue using TestTrack. When e-mail is sent in the background, you regain control immediately and can continue using TestTrack while the e-mail is while you work. TestTrack displays an envelop icon to the right of the process icon on the menu bar while mail is being sent. .

## Sending e-mail manually

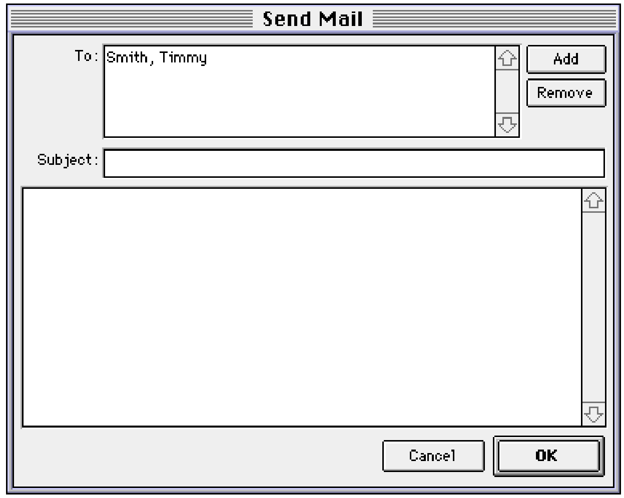
TestTrack has two commands with which you can send e-mail to user and customers: Send Mail and Reply to Submitter. .

### Sending mail to any user or customer

To send an e-mail message manually to one or more users and customers:

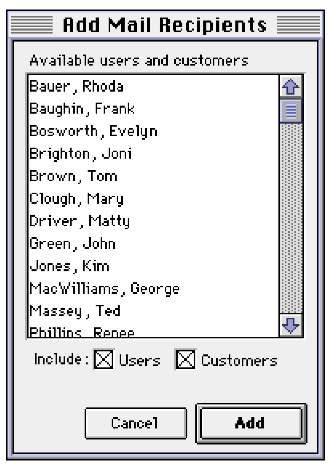
**1 Choose Send Mail from the Mail menu.**

The Send Mail dialog box appears.




**2 Click the Add button.**

The Add Mail Recipients dialog box appears.




**3 Click the Users and/or Customers check boxes to control who appears in the list.**

4 **Select a name and click Add.**

The name appears in the To list box on the Send Mail dialog box. Repeat for each user and customer you want to send mail to. Click Cancel when you've added all the recipients.

---

**Note** If you want to remove a recipient from the To list box, select the name and click Remove.

---

5 **Type the subject and a message to send.**

7 **Click Send.**

The Send Mail dialog box disappears and the e-mail is either sent immediately or queued for background processing depending on your Send Mail options.

## Replying to a defect's submitter

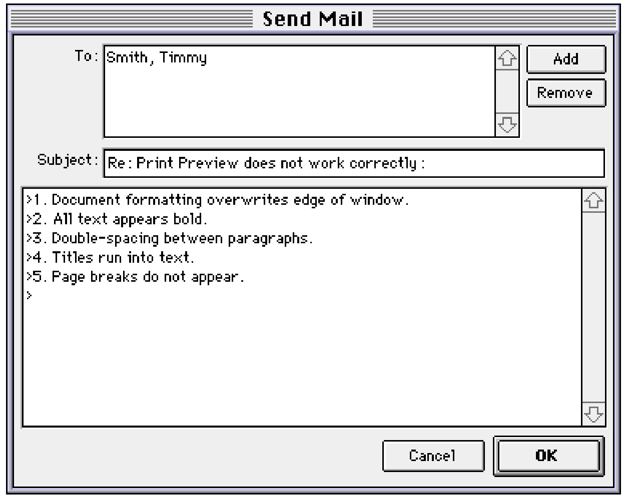
To send e-mail to the user or customer who submitted a defect:

1 **Select the defect you want to reply to from the Defects list window.**

You can also reply to a defect you are editing or viewing.

**2 Choose Reply to Submitter from the Mail menu.**

The Reply to Submitter dialog box appears.




The recipient list is populated with the name of the user or customer who submitted the defect report. The subject field contains the defect's summary text. The message body contains defect's description in quoted form.

**3 Enter any additional comments to the body of the message.**

**4 Click Send.**

The Send Mail dialog box disappears and the e-mail is either sent immediately or queued for background processing depending on your Send Mail options.

# Pausing e-mail notifications

You can temporarily pause sending e-mail via SMTP. E-mail is still queued to be sent later when sending e-mail is resumed.

To pause sending e-mail via SMTP:

**Choose Pause SMTP Mail from the Mail menu.**

To resume sending e-mail via SMTP:

**Choose Pause SMTP Mail from the Mail menu again.**

# 14 Working with E-mail Import

## Contents



## Simplify and improve technical support!

Today an e-mail address on the Internet is required to provide decent technical support. TestTrack solves the problem of importing those support issues into your defect tracking system and responding quickly to customers.

This chapter explains how to set up TestTrack to monitor a POP3 e-mail account for incoming bug reports.

# About e-mail import

A compelling feature of TestTrack is the ability to monitor a POP3 e-mail account for defect reports. Basically this feature allows you to set up an e-mail account (e.g., support@seapine.com) and import any e-mail sent to that account into TestTrack. TestTrack can automatically reply to the sender with an e-mail confirming the receipt of the support issue. The reply message is fully configurable and is optional.

Using TestTrack's deferred defect numbering, defects imported from the e-mail account won't be numbered until you have a chance to review them. See Chapter 4, "Working with defects," to learn about deferred defect numbering.

# Configuring e-mail import

E-mail import requires you to set up a dedicated POP3 e-mail account to receive support issues from your customers. TestTrack can then monitor this e-mail account for incoming defect reports. These defect reports are added to the defect list and the customers that submit the reports are added to the customer list.

To access the Options dialog box and complete the Import Mail tab:

**1 Choose Options from the Edit menu.**

The Options dialog box appears.

**2 Click the Import Mail tab and select the e-mail options.**


The following describes the options:

**Enable importing defects via Internet e-mail** Click the check box if you want to enable importing bug reports from a POP3 Internet e-mail account. Enter the address of the POP3 host (server), the e-mail account name, and the account's password.

**Look for new defects every** Select the interval you want TestTrack to look for new e-mail to import.

**e-mail an acknowledgment** Click the check box if you want TestTrack to e-mail an acknowledgment to the person who submitted the defect report.

**3 Click OK.**

Your new options take effect.

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**Tip** You should also review the e-mail message template containing the message that is sent back to the e-mail's sender. See Chapter 13, "Working with E-mail Notifications," to learn more about configuring e-mail message templates.

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# Appendix A
# Field Codes

## About Field Codes

E-mail templates support **fields codes**. Field codes are sequences of letters enclosed in percent signs that TestTrack replaces with information from the project file. For example, the sequence %DATS% is replaced with the current date in mm/dd/yy format, while the sequence %DNUM% is replaced with a defect number. .

Each e-mail notification corresponds to a single defect. You use field codes to build personalized e-mail messages that provide information specific to the defect that triggered the notification or, in the case of an e-mail acknowledgment, was imported via e-mail.

# Field Codes

The following field codes are supported by TestTrack 1.6:

| | |
|---|---|
| **%ASSD%** | The date the defect was most recently assigned. |
| **%ASST%** | The user to which the defect is assigned. |
| **%COMP%** | The component containing the defect. |
| **%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. |
| **%DNUM%** | The defect's number. |
| **%DOCA%** | Whether the most recent defect fix affects documentation. |
| **%DUPL%** | The defect's duplicate status. |
| **%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. |
| **%ESTW%** | The defect's most recent estimated fix date. |
| **%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. |
| **%FIXT%** | The total time required to fix the defect. |
| **%FIXV%** | The version in which the defect was fixed. |

## Field Codes (continued)

| | |
|---|---|
| **%FNDB%** | The person who found the defect. |
| **%FNDD%** | The date the defect was found. |
| **%FNDV%** | The version in which the defect was found. |
| **%MODD%** | The date the defect was last modified. |
| **%NUMR%** | The number of users and customers reporting the defect. |
| **%PRIO%** | The defect’s priority. |
| **%PROD%** | The product containing the defect. |
| **%REFR%** | The defect’s reference field. |
| **%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’ resolution. |
| **%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. |

# Field Codes (continued)

**%VERD%** The date the defect resolution was most recently verified.

**%WORK%** The defect's workaround.

**%WRKH%** Whether the defect has a workaround.

# Field Code Notes

Some addition information about field codes:

- All dates use the system defined date formats and are year 2000 compliant. Unless otherwise specified, the dates are represented in short date format (mm/dd/yy).
- To include a percent sign (%) in the body of a message, include two percent signs in a row (e.g., "%%").
- E-mail notifications support field codes in the e-mail subject line. Therefore, you can include personalized subjects such as "Re: %SUMM%" which expand to include the defect's summary field in the e-mail's subject.

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