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TRACKER

FULL RELEASE NOTES

v6 All Versions

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Tracker Release Notes

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V6.1.41

New Features & Enhancements

Introduction:

Version 6.1.41 is the latest offical release featuring security updates and enhanced functionality.

General:

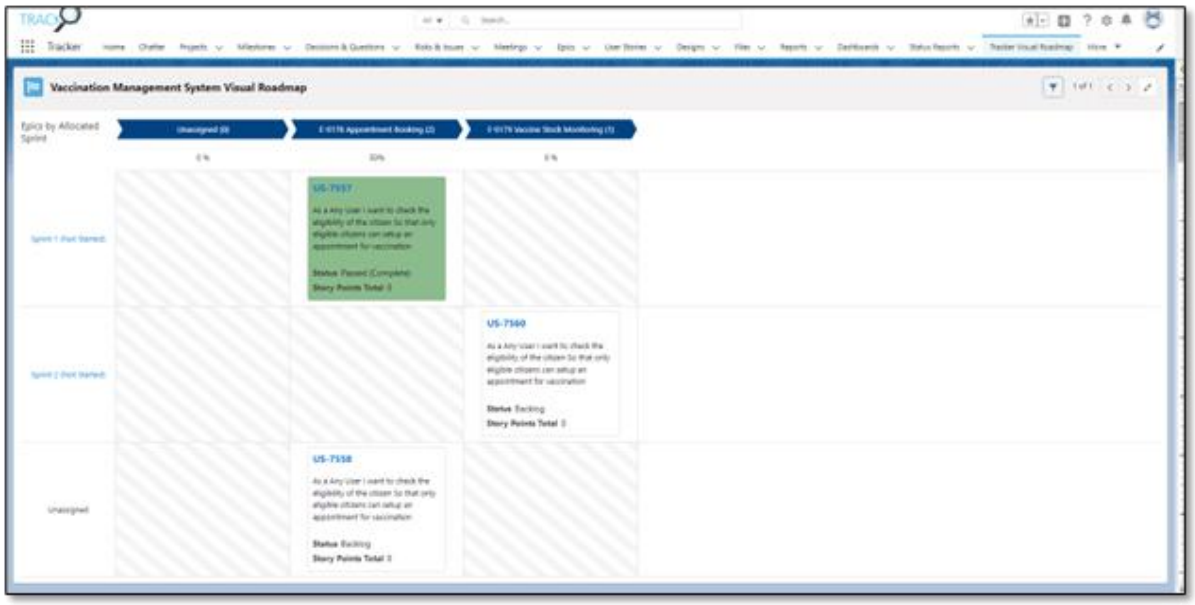
As of version 6.1.41 we are pleased to provide updated security features in line with Salesforce's CheckMarx guidelines. Moreover, we have included new features supporting project management and overview.

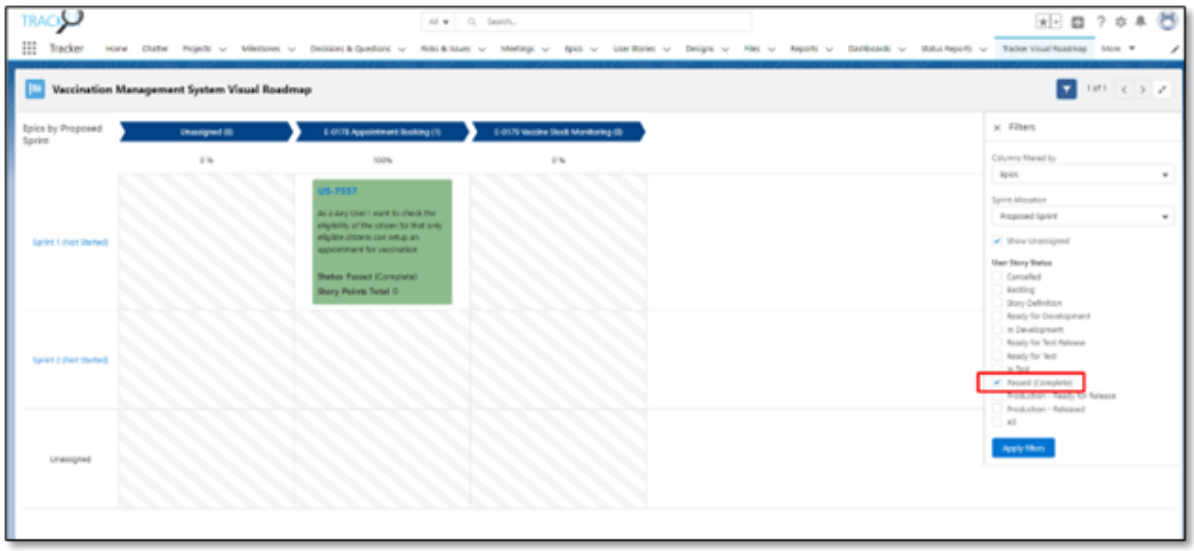
Project Management

Tracker Project Roadmap

We have added functionality to make it easier to visualise the development process and progress of a project. This feature provides project teams, product onwerns, and stakeholders a holistic view of the features and functionalities associated to a project.

This is a lightning web component, showing user stories by Sprint and allowing to group by Epics or Feature Sets. A user can filter the user stories by user story status, column header (epics or feature sets), or sprint allocation (proposed or allocated sprint) depending on what information about the project they want to emphasise.





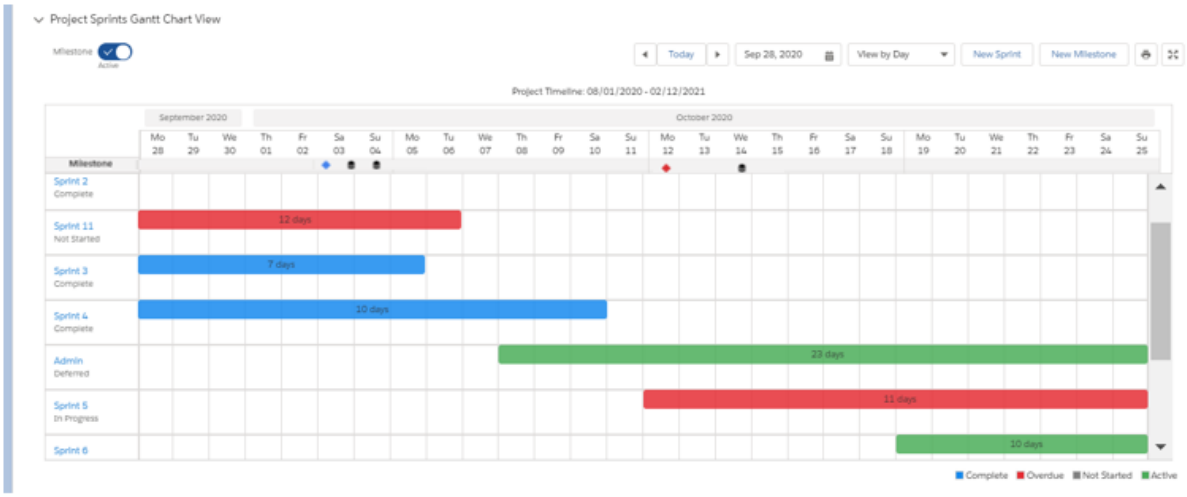
Note:

- Access to the Project Roadmap is governed by the 'TKR Visual Roadmap Permission' custom permission
- The 'TKR_RoadmapUserStoryAdditonalFields' field set can be customized to select which fields to display in the user story card.
- The color of the user story card can be customized per user story status. This is controlled by the 'TKR_User_Story_Status' custom setting.
- The sorting of the column headers is controlled using custom setting 'TKR_Visual_Roadmap_Sort_Setting'. There is an option to sort the columns by Reference Number or Title Name.

Lightning enabled Project Gantt Chart (with milestones)

We have replaced the legacy Project Gantt Chart (visualforce based) with a new, feature rich lightning (LWC) version. The new Lightning Project Gantt Chart provides Project Managers, Stakeholders and Team members with a single view of the Project's timeline.
This new feature displays both the Sprints (as bars) and Milestones (toggle view on/off) that fall along the project's timeline. Sprint bars are drag & drop, so you can adjust their timelines directly from the gantt chart view (assuming User has permission to). In addition, we've also included "New Sprint" and "New Milestone" buttons in the gantt chart, so you can now create these directly from the gantt chart view.

The new Project Gantt Chart feature allows Admins to customise for your org the colours of the statuses to set the date range being displayed, view the timeline as days, or weeks and a print (current view) to PDF option



Sprint Management

Workload Manager

The new functionality "Workload Manager" enhances sprint planning and monitoring by allowing to consider both user stories and tickets for prioritisation. All user stories/tickets of a particular sprint are visible in a list view form and can be assigned a proposed and allocated rank. The rank assignment happens through drag and drop. This feature will also allow the scrum master to filter the view with respect to the proposed and allocated sprints, along with the ability to see and unsee the tickets and tasks related to a sprint.
This feature also enables team members to view the user stories and tickets assigned to them along with their rank in a single screen view. This helps the user to prioritise their work based upon the ranks assigned to the user stories or tickets.
Additional in-screen guidance is available for more details on stories, tickets and tasks to allow quick prioritisation in one view.

Lightning Sprint Kanban Board

As part of our and Salesforce's ongoing commitment to the latest security standards, we have retired the legacy (visualforce based) "Digital Kanban" board available on a Sprint record.
This has been replaced with a new Lighning (LWC) based Kanban board that is automatically linked to the Sprint record the User is accessing it from. This feature also allows drag & drop of Usr Stories from one status to another and more closely aligns to standard Salesforce kanban functionality. The great news is its stil fully configurable in the same way as its precedessor (via custom setting, allowing Admins to choose which Status vallues to display).

Sprint "Include Working Weekends?" calculation

We have introduced a new "Include working weekends?" checkbox to Sprint object. This new field allows Scrum Masters to include weekends in the "Total Working Days in Sprint" (TKR_Sprint_Calculate_Working_Days) formula calculations.

> For example, if a sprint runs for 14 calendar days (e.g. 10 working days), by checking this box, the Total Working Days in Sprint calculation will include any weekend days that fall within the Sprint's Start / End dates.

***Notes**:*

- *Default value is unchecked (i.e. do not include weekends in calculation)*
- *This calculation is also used by the Burndown chart functionality to determine optimal velocity based on the "Total Working Days in Sprint".*

Validation Rule: Sprint End Date cannot be earlier that Sprint Start date

As requested by many of you, we have added as standard a new validation rule (TKR_Sprint_EndDate_after_Startdate) to the Sprint Start and End dates, to ensure Sprint end date cannot be earlier than the start date. Also that both of these fields are required to create a Sprint record.

Sprint Completed User Story Points calculation

As a reminder: In v5.1.35 we introduced a fully automated process to automatically calculate the *Completed Story Points* field value for a Sprint (where it is the Allocated Sprint on any given User Story). The trigger will process to update (Add/Subtract) the "Completed Story Points" value of the Allocated Sprint record for a User Story when it is set to burnt (i.e. Status "*Passed Complete*").

However, you can use the new *TKR Burn Status Exclusions* custom setting allows you to determine if User Story Statuses occur after the Burnt status, should not affect this calculation in any way (i.e. excluded from the logic).

CI Settings

The objectives of the enhancement of the Continuous Integration (CI) Settings functionality in Tracker are to:

1. <u>Maintain all CI settings in one place for admin users</u>

With the necessary permission set assigned to the user account, admin users can access the CI Settings custom object and integrate Tracker to a version control system. Each CI Settings record contains the configuration (repository and integration details) they intend to implement in the Tracker org.

2. <u>Add flexibility in customizing the CI Settings</u>

No more hard-coded values with the new CI Settings custom object. CI Settings supports dynamic configurations depending on the requirements of the project. For example, you can input any user story status values that will be used as trigger for the automatic branch creation.

3. <u>Easily setup an org-wide default or customize per project</u>

Admin users can implement a one-time setup of an org-wide default that will be applied to all projects within Tracker just by ticking the OrgWide default checkbox in the CI Setting record. If there are projects that have specific repository or branching strategy requirements, the org-wide default can be overridden by creating a separate CI Setting record and assigning it to the project.

4. <u>Allow standardization of the branching strategy and naming convention</u>

Developers don't need to manually create the branches and input the branch names. CI Settings automates the feature branch creation and applies the configuration from the CI Settings record (the source branch from which the feature branch will be created and the prefix of the feature branch name) so all feature branches created are consistent and adherent to their DevOps processes.

5. <u>Improve traceability of the commit logs</u>

Users with no access to the version control systems will be able to view the commit history of the feature branch related to the user story within Tracker.

Overview of the CI Settings custom object

The CI Settings custom object contains the following fields:

Field Name	Field Type	Required?	Description
Name	Text	Y	Label of the CI Settings record
Active	Checkbox	N	Switch to activate/deactivate the CI Settings record
Named Credential	Text	Y	Determines which Salesforce Named Credentials to use for the integration. Use the API name of the Named credential to populate this field.

Org Wide Default	Checkbox	N	Sets an org wide default setting. All projects that do not have a defined CI Configuration will follow the org wide default CI Setting. Only one active org wide default is allowed.
Integration Type	Picklist	Y	Integration Type picklist to select which type of integration will be applied. Picklist values are as follows: • **Bitbucket (Direct)** - integrate with a Bitbucket (cloud based) repository • **Github (Direct)** - integrate with a Github (cloud based) repository • **Repository Middleware Integration (Indirect)** - Integrate Tracker to a private repository via middleware (Jenkins) to monitor commits by mentioning ***** Pull request creation is ONLY available for DROP*****
Branching Strategy	Picklist	Y	Determines which branching strategy will be applied to the CI Settings record • **Feature** - Creates feature branch on the repository and Tracker SCM commit logs • **DROP** - Creates feature and release branch in the repository and Tracker SCM commit logs • **Commit Logs Only** – Creates SCM commit logs only in Tracker
Repository Name	Text	Y	Determines the name of the repository to be used in the integration.
Owner Username	Text	Y	Applicable to Github integration type only. Determines the username of the repository owner.
Workspace Name	Text	Y	Applicable to Bitbucket integration type only. Determines the name of the workspace to be used for the integration.
Feature Branch Prefix Name	Text	Y	Determines the prefix for standardization of the naming convention of the feature branches. For example, if the feature branch prefix name is "feature1_", the name of the feature branch created in the repository will be: *Feature Branch Prefix Name* + US Ref (e.g. feature1_US-1234).
Feature Branch Source	Text	Y	Determines the name of the branch source where the feature branch will be created from.
Release Branch Prefix Name	Text	N	*****Applicable to DROP branching strategy only***** Determines the prefix for standardization of the naming convention of the release branches. For example, if the release branch prefix name is "release1_", the name of the release branch created in the repository will be: *Release Branch Prefix Name* + US Ref (e.g. release1_US-1234).
Release Branch Source	Text	Y	*****Applicable to DROP branching strategy only***** Determines the name of the branch branch where the release branch will be created from.
Branch Creation User Story Status	Text	Y	Determines which user story status to be used to trigger the feature and/or release branch creation. Use the picklist value label of the user story status to populate this field.
Pull Request User Story Status	Text	Y	*****Applicable to DROP branching strategy only***** Determines which user story status to be used to trigger the pull request creation (from feature to release branch). Use the picklist value label of the user story status to populate this field.

			The name of the pull request created in the repository will be the US-Ref.
Hook URL	Text	Y	Applicable to Repository Middleware Integration (Indirect) type only. Determines from which domain/URL API callout will be accepted for Tracker to create SCM commits.

**DROP (Deloitte Release Orchestration Pipeline) – CI/CD managed service for Salesforce Platform. Contact us for more information on the DROP system.*

Tips:

- A user should have the 'Tracker CI Admin' permission set assigned to have read/write permissions on the CI Settings object.
- The setup requirements for the Bitbucket/Github integration should be completed prior to creating a CI Setting record.

If required, defaults can be overridden at project and sprint level.

Note:

- Tracker CI Admin permission set is required to access the CI Settings custom object and CI Configuration fields on project and sprint page layouts.

Security Updates

Security & Administration following CheckMarx Review:

1. All the classes/functionalities will now follow CRUD permissions given to the profiles. (FLS Read/Write/update)
2. Security checks for SOQL queries are enforced to make sure the records are accessed based on user access to the system.
3. CSRF protection has been enhanced & we removed XSS Attacks from the VFpages.

Enhanced Bitbucket Integration

We have added a new custom setting to allow organisations greater control and flexibility for their Bitbucket integration. This new custom setting allows admins to define a custom bit bucket URL, thus enabling support to connect Tracker and bitbucket.

The URL should contain the BitBucket instance that the APEX integration code will scan for. Typically, this is set to cloud version "https://bitbucket.org". This URL is now used by the TKR_BitbucketEmailHookManager class to read the inbound email message values and commit to the SCM record

Component Type	Component Name	Default Value	Added / Updated
Custom Setting	TKR BitBucket Email Hook URL		Added
Custom Setting: Field	TKR BitBucket URL	https://bitbucket.org	Added
Apex Class	TKR_InvokeCommitTrackingService		Updated
Apex Class	Test_TKR_InvokeCommitTrackingService		Updated

Test Management:

Lightning Test Executions – Customisable Ticket fields

As an enhancement to our Lightning Run Test Scripts (test executions) feature, we have now included the ability for Admins to set which fields are included in the “Create new Ticket” modal window on the Test Execution (Run Test Script) page. This enhancements means any custom / required fields you have on your Ticket object can now be supported during the Test execution > Ticket creation process.
To configure this feature, Admins simply need to add values to the Field Set: Create Ticket Fields (TKR_Create_Ticket_Fields) on the Ticket object.

Ticket Management:

New field: Root Cause Analysis

We have added a new Field "Root Cause Analysis" to Tickets object. This is a rich text area field.

Test Script Execution based Tickets automatically populate Sprint value

When creating a ticket from a Test Script Execution Step, a number of Ticket field values are prepopulated from the related Test Script record and User Story. This action now includes populating the Sprint field with the “Allocated Sprint” value from the related User Story record.

Security & Administration:

Tracker Permission Set Updates

The following critical changes have been made to the following Tracker Permissions Sets in order to better support multi project teams within a shared Tracker org. This allows teams to configure the correct level of access via Standard Salesforce Sharing Rules.

- Tracker Scrum Master
- Tracker Test Manager

Detailed of each permission change is as follows:

Tracker SCRUM Master

Component Type	Component Name	Object	Added / Updated
Object	View All	Environments	Removed
Object	Modify All	Environments	Removed
Object	Delete	Environments	Removed
Object	View All	Environment Releases	Removed
Object	Modify All	Environment Releases	
Object	View All	Epics	
Object	Modify All	Epics	
Object	View All	Planning Poker	
Object	Modify All	Planning Poker	
Object	View All	Planning Poker Session Contents	
Object	Modify All	Planning Poker Session Contents	
Object	View All	Planning Poker Session Users	
Object	Modify All	Planning Poker Session Users	
Object	View All	Planning Poker Votes	
Object	Modify All	Planning Poker Votes	
Object	View All	Releases	
Object	Modify All	Releases	
Object	Delete	Releases	

Object	View All	Risks & Issues
Object	Modify All	Risks & Issues

Tracker Test Manager

Component Type	Component Name	Object	Added / Updated
Object	View All	Test/Ticket Links	Removed
Object	Modify All	Tickets	Removed

Sprint Management

Sprint Total Allocated Story Points

The Sprint Total Allocated Story Point calculation has been fixed to now correctly work whenever User Stories are allocated or removed from the a [Allocated] Sprint

Design History

The design history records have been updated to include all core fields from the Design record. These get created whenever a Design record is submitted into the Design approval process

Test Management

Alignment of Test Phase picklist values

We have updated the Test Phase picklist values on the Tester, Test Execution and Ticket Objects to ensure they correctly align across the tool.

V5.1.35 OEM

Version Specific Installation Steps

This version of Tracker requires the following Manual pre and post upgrade installation steps to be completed.
If you require assistance doing this, or wish the Tracker Support team to complete this on your behalf, please contact us directly on trackersupport@deloitte.co.uk

V5.1.35 Pre upgrade steps [Mandatory]:

Verify Client current version

Check the clients About Tracker tab to verify the current installed version. If this is not v5.1.34, then additional pre and post steps will be required before v5.1.35 can be successfully installed

Create New Profile for Tracker - Test Automation Integration User

Copy the standard Salesforce profile to create this profile with the name "Tracker - Test Automation Integration User". It is critical is the license type is "Salesforce" not "Salesforce platform".

V5.1.34 Pre upgrade steps [Mandatory]:

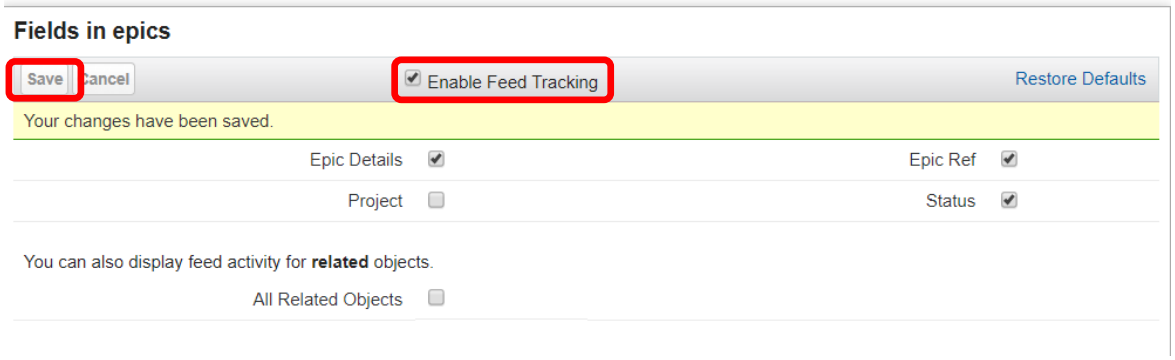
Enable Feed tracking on Status Reports and Epics

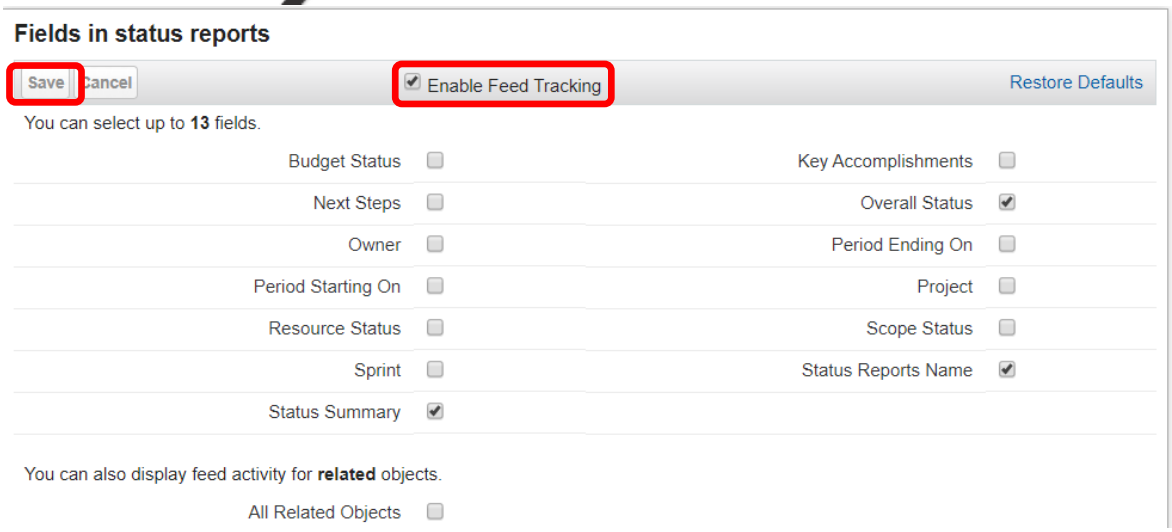
Enable Feed Tracking on "Epics" (TKR_Epic__c) and "Status Reports" (TKR_Status_Reports__c), this must be completed before the upgrade can be installed.

As a System Administrator, Go to Set Up > Chatter > Feed Tracking:

- Find Epics > check the box for "Enable Feed Tracking" > click Save
- Find Status Reports > check the box for "Enable Feed Tracking" > click Save

  Optional: You can choose which fields (if any) within the objects you would like to track within the chatter feed.





Post upgrade installation steps [Mandatory]:

There are a number of Post install steps to follow. Please follow the steps as documented below. If you require assistance doing this, or wish the Tracker Support team to complete this on your behalf, please contact us directly on trackersupport@deloitte.co.uk

(Note: you will need to Grant Account Login Access for the Tracker Support team to do this).

Post install steps are:

1. Set up custom settings:
    - TKR Burn Status Exclusions – add status values that occur after Passed (Complete). The default value options are as follows, however if the Client has modified these status values from the User Story Object, they should be added instead:
        - Production - Ready for Release
        - Production – Released

2. Validate new Tracker – Test Automation Integration Profile creation
    - Check the new profile permissions have been correctly applied. Critically this profile uses a "Salesforce" license (not platform). In addition, this profile requires Set up & Configuration access.

3. Validate Sprint Burn down report functioning on Sprints > dashboard Tab.
    - If you have an "In Progress" Sprint, verify the Sprint Burn Down report is working as a report, then that this is reflected within the Sprint sub tab

4. Feature set tab and permissions

5. OPTIONAL: Set up Tasks sub tab on Sprints and include the User Story Tasks by Sprint report chart

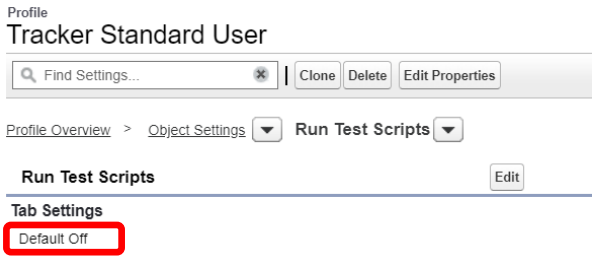
V5.1.34 post install steps

1. Check your "My Domain" has been set up and enabled for all users (i.e. deployed to Users). This is mandatory step required for all Lightning Web Components to function.
    a. Go to Set up > Company settings > My Domain > Ensure a domain is registered and has been deployed to users.
    For more details on this please review the following Salesforce Help article: https://help.salesforce.com/articleView?id=environment_hub_get_started_my_domain.htm&type=5

2. Enable "Lightning Paths" if not already enabled
    a. Go to Set up > User Interface > Path Settings > Click the Enable button if not already activated

3. Set value for Custom Setting: TKR_Sprint_Planning_Status - This allows Admins to configure the value considered as "In Planning" On a Sprint. (This value determines if Sprint planning, Prioritise User Stories, Draw Burndown, Digital Kanban features are accessible or not)
    a. Go to Set up > Custom Code > Custom settings > Find RKR_Sprint_Planning_Status and click the *Manage* link > If no Default Organisation Value exists, Click the *New* button > Save
    (Note: a default value of "In Planning" will be set)

4. Grant Tab visibility for "Run Test Scripts" Object (tab only object) to System Administrator, Tracker Standard User and Tracker Lite User profiles. If you have any custom Tracker profiles, you will also need to grant them access to this tab
    a. Go to Set up > Users > Profiles > Select Tracker Profile > Object settings > find "Run Test Scripts" > Click Edit > Set the Tab visibility to "*Default Off*" > Save



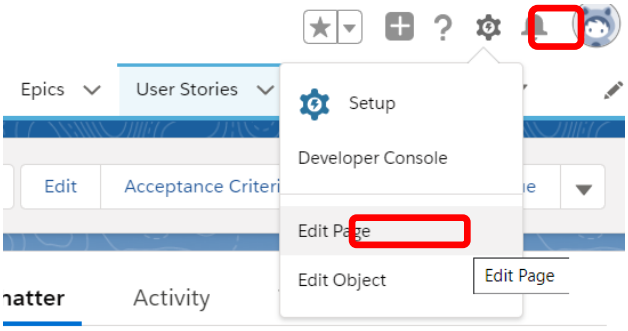
5. Change "Run_Test_Script" button on Test Executions for the Salesfore Mobile and Lightning Experience Action Users

    a. Edit Test Execution Page layout to remove the old "classic" button "*DDTracker__Run_Test_Scripts*" from the Salesforce Mobile and Lightning Experience Actions section of the page layout.
    b. Replace this with the new button "*DDTracker__RunTestScripts*" in the Salesforce Mobile and Lightning Experience Actions section of the page layout.

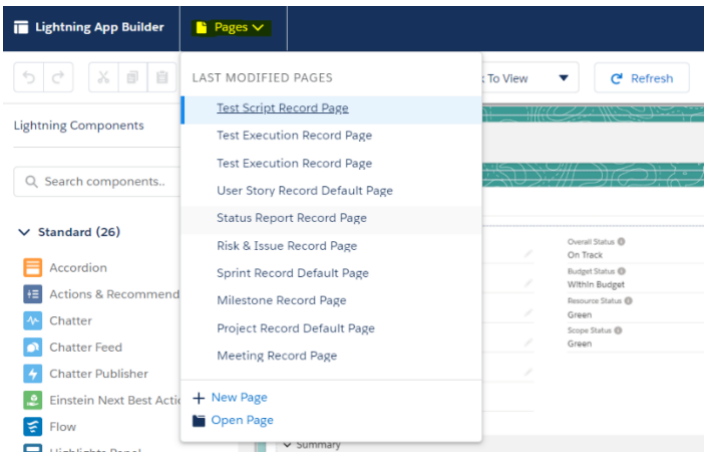
6. Activate/assign new Lightning Pages for objects:
    a. Test Script Record Lightning Page
    b. Test Execution Record Lightning Page

c. User Stories Record Lightning Page
d. Sprints Record Lightning Page

To activate the lightning pages you will need to set assign them to your Tracker App / Tracker & System Admin Profiles. Your Administrator can do this by Navigating to a record for the Object (i.e. a User Story / Test Script / Test execution / Sprint) > Set Up Menu > select "Edit Page"



In the Page Editor, select Pages > Select the Custom Lightning page for the Object you are on (If the page isn't listed select the "Open Page" option to view all Tracker lightning pages available)



You may be warned that you are going to lose unsaved changes, select Confirm
The new Lightning Page will be displayed. You now need to "Activate" this page > select Activate > Complete the Activation steps

Note: Repeat this process for each of the Lightning Pages / per object.

7. Edit Page layouts to re-order buttons for Salesforce Mobile and Lightning Experience Actions section:
   a. Reorder Test Script buttons on Test Script Page Layout - Recommend the following order for the buttons for Lightning Users: Edit, Test Step Sequencing and Clone (with Steps)… are now the default displayed buttons

b. Reorder Sprint Buttons on Sprint layout – Recommend the following order for the buttons for Lightning Users: Edit, Plan Sprint, Prioritise User Stories, Kanban Board, Draw Burndown… are now the default displayed buttons

V5.1.35 OEM

Introduction: Version 5.1.35 is offical release which also includes all imcremental changes prepared and tested as part of the beta v5.1.35 and v5.1.34 releases.

General:

New Tracker Lightning Apps

As of version 5.1.35 OEM - We are pleased to continue providing enhanced features within Tracker for Users of the Lightning UI. This release we have included lightning specific versions of the Tracker apps so your users can benefit from lightning app specific features. These app also inlcude assignment of Lightning flexipages

- TKRL_Sprint_Management
- TKRL_Test_Management
- TKRL_Release_Management
- TKRL_Tracker (updated existing default Tracker Lightning app)

This release includes new/updated tailored Lightning Pages for the following objects:

- Design Records (Sprint, Data, Integration)
- Tickets
- Feature Sets

Compact Lightning layouts

We have added Compact lightning layouts for a number of objects to improve the user experience. Customised compact layouts are now available as follows:

- TKR_Project_Compact_Layout
- TKR_Sprint_Compact_Layout
- TKR_User_Story_Compact_Layout
- TKR_Epic_Compact_Layout
- TKR_Feature_Set_Compact_Layout
- TKR_Test_Script_Compact_Layout
- TKR_Test_Execution_Compact_Layout
- TKR_Ticket_Compact_Layout
- TKR_User_Story_Design_Compact_Layout

Usability

We have added additional user instructional "Tips" text to Sprint, Test Scripts and Test Execution lightning page layouts, to help guide users on the actions to take.

We have updated the default tabs for the Tracker App. This now includes the new Feature Sets tab, while removing the Meetings tab by default. These can be amended by your admin / personal preferences, and both objects are visible within a Project record

Additional External Reference Fields

We have added external Reference fields to better support teams that wish to import data from another tool/system into Tracker or link Tracker records to data in other systems. The new External Reference fields have been added to the following Objects:

- Feature Sets
- Epics
- Milestones
- Designs
- Test Scripts
- Test Script Steps

Sprint Management

User Story Dependencies

We are pleased to release this new feature to capture and track the relationships between User Stories. This feature allows Users to specify a relationship, either as the "Parent of" the current User Story record (i.e. the current User Story is dependent upon the parent User Story), or as a “child” of the current User Story (i.e. is dependent upon the current User Story)
This is available as a new lighting web component within the User Story > Dependencies sub tab. Alternatively you can view through the related lists on the User Story Object.

Feature Sets

As requested by many of our agile teams, we have introduced to the ability to group and manage User Stories under Features/Feature Sets. Unlike Epics which are closely aligned to processes, Features Sets are discrete groupings of requirements that, when delivered together form a complete "feature". A feature set could comprise of User Stories from across any number of Epics, Apps and across the timeline of Sprints.
The Feature Sets functionality includes roll up summary for the number of User Stories allocated to the feature Set. In addition, it includes a dashboard sub tab which displays number story points against that Feature Set and by status of the allociated User stories.

Custom Report: User Stories by Feature Set

To compliment the new Feature Set functionality, we have included a new report User Stories by Feature Set. This report only includes User Stories that have a Feature Set assigned to them.

Custom Report: User Stories by Status by Feature Set

A new report detailing All User Stories with/without Feature Set, grouped by Feature Set and Status.

Custom Report: Feature Set - Assigned User Story Points

A new report has been added and is used within the Feature Set Page layout. This report shows the assigned User Stories (Story Point Totals) by Status.

Epic field enhancements

To improve the information capture and presentation on the Epic record, we have made the following enhancements:

Object	Name	Type	Added / Updated
Epic object	Epic Title	*Text (255)*	Added
Epic object	Epic Details		No longer mandatory
User Story Object	Parent Epic Title	(formula)	Added

Sprint Completed User Story Points calculation

We have introduced a fully automated process to automatically calculate the *Completed Story Points* field value for a Sprint (where it is the Allocated Sprint on any given User Story). The trigger will process to update (Add/Subtract) the "Completed Story Points" value of the Allocated Sprint record for a User Story when it is set to burnt (i.e. Status Passed Complete).

However, you can use the new *TKR Burn Status Exclusions* custom setting allows you to determine if User Story Statuses occur after the Burnt status, should not affect this calculation in any way (i.e. excluded from the logic).

Custom setting: TKR Burn Status Exclusions

Used to list which User Story Status values should be excluded from the calculation processes (both add/subtract of values) for calculating the Complete Story Points of the Allocated Sprint record.

The User Story trigger automatically adds the Total Users Story points delivered (burnt) to the running total on the Allocated Sprint record (Completed Story Points). However, if the User Story Status changes after the Story has been marked as burnt/complete, then this value could need to be subtracted again. This custom setting allows you to determine User Story Statuses that occur after the "Burnt" status and therefore should not affect the calculation in any way (i.e. excluded these status values from the logic).

Component Type	Component Name	Default Value	Added / Updated
Custom Setting	TKR Burn Status Exclusions		Added
Custom Setting: Field	List of Values	Production - Ready for Release Production - Released	Added

Design field enhancements

To improve the information capture and presentation of the Design record, we have made the following enhancements:

Object	Name	Type	Added / Updated
Design object	Design Ref	*Auto populated text(10)*	Added This field is auto populated with a sequenced number
Design object	Lightning Web Components (LWCs)	Rich Text Area	Added

Design object	Process Automation / Flows	Rich Text Area	Added

IMPORTANT NOTE:
Upon upgrade to this version of Tracker: A Post installation script will automatically run to update each existing Design Record you have in order to add the new Deign Ref number value to them. Your Design records with have a new Last Modified date as a result.

User Story Lookup Filters (Optional)

To improve multi-project working, we have added the following optional filters to the User Story Object:

Look up Field	Filter criteria
Allocated Sprint	User Story: Project ID EQUALS Allocated Sprint: Project ID
Proposed Sprint	User Story: Project ID EQUALS Proposed Sprint: Project ID
Epic	User Story: Project ID EQUALS Epic: Project ID
Feature Set	User Story: Project ID EQUALS Allocated Sprint: Project ID

Enhanced Bitbucket Integration

We have added a new custom setting to allow organisations greater control and flexibility for their Bitbucket integration. This new custom setting allows admins to define a custom bit bucket URL, thus enabling support to connect Tracker and bitbucket.

The URL should contain the BitBucket instance that the APEX integration code will scan for. Typically, this is set to cloud version "https://bitbucket.org". This URL is now used by the TKR_BitbucketEmailHookManager class to read the inbound email message values and commit to the SCM record

Component Type	Component Name	Default Value	Added / Updated
Custom Setting	TKR BitBucket Email Hook URL		Added
Custom Setting: Field	TKR BitBucket URL	https://bitbucket.org	Added
Apex Class	TKR_InvokeCommitTrackingService		Updated
Apex Class	Test_TKR_InvokeCommitTrackingService		Updated

Test Management:

Lightning Test Script Steps Inline Editor

We are pleased to launch our new inline editor feature for Test Script Steps. This new feature allows Test Script writers / managers to easily create and manage Test Script steps from one screen:

- ✓ Ability to create multiple steps at once
- ✓ Ability to edit multiple steps at once
- ✓ Ability to mass save (save all steps/changes)
- ✓ Ability to clone or delete individual steps

- ✓ Ability to access the Sequence Steps button, to re-sequence the steps if desired

NOTE: We have moved the Test Scripts Step > Sequence Test Steps button from the Test Script page layout into the new inline editor page, where it fits better to the process.

Provar Test Automated tool Integration

We are pleased to release our new Provar Test Automation integration capability. This allows teams using Provar to integrate it directly with Tracker, so that any Automated Test Executions conducted within Provar, can be logged (mirrored) within Tracker to allow for consistent, single source for reporting

This new integration feature includes new Profile specifically for the integration: *Tracker - Test Automation Integration User, as well as a* permission set for viewing test automation logs / data.

Custom Report: Automated Test Outcomes Report

To compliment the Provar integration we have included a new custom report: Automated Test Outcomes Report. This report provides details of the test executions that have been created by the Provar integration as an "*Automated Test Case*".

This report chart has also been added to the default *"Tracker - Test Monitoring – Template"* dashboard

List View: Automated Test Scripts

To compliment the Provar integration we have included a new custom list view: Automated Test scripts. This view provides details of the test executions that have been created by the Provar integration as an "*Automated Test Case*".

Testing Report Type updates

We have added a number of new fields, including *TKR_Sequence* and *TKR_Pre_Requisite* to Test Scripts with Test Steps, Test Script with Test Executions, User Stories with Test Scripts with Executions report types. This makes it possible to include these in your reports as required.

New field: *Test Script Priority*

A new field has been added to the Test Script record to capture the Priority of the Test Script (TKR_Test_Template) object. This is a picklist containing the default values of High, Medium, Low

Ticket Management:

New field: Root Cause Analysis

We have added a new Field "Root Cause Analysis" to Tickets object. This is a rich text area field.

Test Script Execution based Tickets automatically populate Sprint value

When creating a ticket from a Test Script Execution Step, a number of Ticket field values are prepopulated from the related Test Script record and User Story. This action now includes populating the Sprint field with the "Allocated Sprint" value from the related User Story record.

Ticket Lookup Filters (optional)

To improve ulti-project working, we have added the following optional filters to the Ticket Object:

Look up Field	Filter criteria
Sprint	User Story: Project ID EQUALS Sprint: Project ID
User Story	User Story: Project ID EQUALS User Story: Project ID

New User Story	User Story: Project ID EQUALS User Story: Project ID
Test Execution	User Story: Project ID EQUALS Test Execution: Project ID

Ticket Report Type updates

We have Ticket report types to include the new Root Cause Analysis field. This makes it possible to include these in your reports as required.

Task Management

Custom Report: All User Story Tasks by Sprint Report

Added a new report that shows All Tasks related to User Stories, grouped by Sprint. This report is available within Tracker Sprint Management Folder. This custom report has been added, to help teams that work with [Standard] Tasks.

V5.1.33 OEM

Introduction: Version 5.1.33 is offical release which also includes all imcremental changes prepared and tested as part of the beta v5.1.32 and v5.1.31 releases.

General:

Salesforce Lightning Support

As of version 5.1.33 OEM - We are pleased to continue providing enhanced features within Tracker for Users of the Lightning UI

This release includes new/updated tailored Lightning Pages for the following objects:

- Test Scripts
- Test Executions
- Sprints
- Status Reports

Lightning Paths

We have also included new Lightning Paths for

- **Test Executions -** Displaying a view of the Test Execution status and providing guidance to the Tester

Component Type	Component Name	Added / Updated
Lightning Path	TKR_Test_Execution_Path	Added
Lightning Page	TKRL_Test_Execution_Record_Page	Added

Shared Custom Label > Save & Close

We have included an new custom label for "Save and Close" buttons used across Tracker. This allows for translation and modifying the label displayed to Users:

Component Type	Component Name	Default Value	Added / Updated
Custom Label	TKR_Save_and_Close	*"Save and Close"*	Added

Currently used on:

- Prioritise User Stories page
- Test Script Step Sequencing page

Test Management:

Lightning Test Executions (Run Test Script function)

We are pleased to launch our new Lightning Run Test Scripts (test executions) feature (only available in Lightning UI). This new lightning test executions page comes with an improvements requested by you, our user community. Improvements include:

- ✓ A new Test Execution page layout to improve the overall User experience and speed up the execution and ticket raising process
- ✓ The ability to click on a URL link to open an attachment on a test execution step.
- ✓ The ability to link one or more existing and/or new tickets to a test execution step. Existing tickets can be searched using Ticket Number or Summary.
- ✓ The ability to delete the link between a ticket and a test execution step if a ticket has been linked in error. The Ticket is not deleted, only the link is removed
- ✓ The ability to associate screenshots (attachments) to test execution steps and tickets from within the test execution
- ✓ The ability to choose the approver and submit the test execution for approval from within the test execution* *(if you have approval process enabled)*
- ✓ The ability to have the Test Status automatically set to Started when the first execution step result is recorded and to Complete when the Overall Test Outcome is recorded

This feature is available from the Test Execution record page > Run Test Script button, or from the "*Click to Execute*" link, visible in the "My Test Executions" report(s) and Related Lists.
Note: The "*Click To Execute*" link will automatically detect if you are using Salesforce Classic UI or Lightning UI and route your Testers automatically to the correct feature.

The following components are part of the new Lightning Test Execution function

Component Type	Component Name	Object	Added / Updated
Apex Class	TKR_RunTestScriptsController TKR_SelectOptionWrapper TKR_RunTestStepsWrapper TKR_RuntestPicklistWrapper		Added
Apex Class	TKR_runTestScriptExtension		Updated
Visualforce page			
Lightning Page	TKRL_Test_Execution_Record_Page	TKR_Test_Execution	Added
Custom Button	RunTestScript	TKR_Test_Execution	Added

Formula Field	Run_Test_Script__c	TKR_Test_Execution	Updated
Lightning Components	TKR_AssociateTicket TKR_CreateNewTicket TKR_PostToChatter TKR_RefreshParent TKR_RunTestScript TKR_RunTestScriptApplication TKR_UploadAttachment		Added
Custom Labels	TKR_Add_Ticket TKR_Attach_Files TKR_Awaiting_Approval TKR_Business_Impact TKR_Close TKR_Complete_this_field TKR_Create_Ticket TKR_Description_help_Text TKR_No_Ticket_Message TKR_Overall_Outcome TKR_Overall_Test_Comments TKR_Problem_Summary TKR_Save_Test_Step TKR_Search_Approver TKR_Tickets TKR_Upload		Added

Test Script Step Sequencing

We have made a few enhancements to the Test Script Steps Sequencing feature, as follows:

- Restyled the existing functionality to fit with the Lightning UI.
- This page now uses the Custom Label: TKR_Save_and_Close for the Save and Close button

Test Script Lighting Page Layout > button order

We have reordered Test Script buttons on Test Script Page Lighting Layout, so the "*Edit*", "*Steps Sequencing*" and "*Clone (with Steps)*" are now the displayed buttons, with the remaining being under the collapsed menu

Sprint Management

Prioritise User Stories

We have made a few enhancements to the Prioritise User Stories feature, as follows:

- Restyled the existing functionality to fit with the Lightning UI.
- This page now uses the Custom Label: TKR_Save_and_Close for the Save and Close button
- Added a new (custom label) warning message if trying to prioritise User Stories when the sprint is not considered as "In Planning" (see also new "In Planning" custom setting).

Component Type	Component Name	Default Value	Added / Updated

Custom Label	TKR_Unable_to_Prioritise_User_Stories	This sprint status is not "In Planning", therefore you cannot prioritise the User stories	Added
Custom Label	TKR_Close	Close	Added
APEX Class	TKR_PrioritizeUserStoryController		Updated
VisualForce Page	TKR_PrioritizeUserStories		Updated

User Stories Lightning page layout

Based on your feedback, we have reordered in-page component tabs on the User Story record, to set the defaults to "*Details*" and "*Chatter*", and display them first respectively.

Sprint "In Planning" Custom Setting

We have added a new custom setting to allow Admins determine which status value(s) are considered as "In Planning", as this controls which Sprint management features are accessible, when. This custom setting is as follows:

- **TKR Sprint Planning Status**
  To allow Admins to configure the value considered as "In Planning" On a Sprint. This value determines if Sprint planning, Prioritise User Stories, Draw Burndown, Digital Kanban features are accessible or not
  - **Planning Status Value** - Use to set which Status value(s) are treated as "In Planning" by the application

Component Type	Component Name	Default Value	Added / Updated
Custom Setting	TKR_Sprint_Planning_Status__c		Added
Custom Setting: Field	DDTracker__Planning_Status_Value__c	In Planning	Added

Project Management

Status Reports general enhancements

We have enabled Chatter for the Status Reports object, to allow team to collaborate on the completion of a Status Report. In addition, we have create a new Lightning page for Status Reports TKRL_Status_Report_Record_Page to allow for a more customised view. Included in the new Lightning page we have reordered the buttons to improve the usability

V5.1.30 OEM

Minor release for aiding Lightning compatibility and administration of Tracker Users / Licenses

Security & Administration:

Tracker Allocated User Profiles Report

Tracker Allocated User Profiles Report (TKR_Allocated_User_Profiles) – Allocated User Profiles report detailing total number of users assigned against profiles. To help Tracker admins and the Tracker support team manage/monitor the allocation of Tracker profiles to users

V5.1.29 OEM

Introduction: Version 5.1.29 is offical release which includes all imcremental changes prepared and tested as part of the beta v5.1.28 and v5.1.27 releases.

General:

Salesforce Lightning Support

As of version 5.1.29 OEM - We are pleased to continue providing enhanced features within Tracker for Users of the Lightning UI

This release includes new tailored Lightning Pages for the following objects:

- Projects
- Sprints
- User Stories
- Test Scripts
- Change Orders

Lightning Paths

We have also included new Lightning Paths for

- **Projects**
  Displaying a view of the Project overall status and providing guidance to the Project Manager

- **Sprints**
  Displaying a view of the Sprint progress and providing guidance to the SCRUM Master / Project Manager on what activities and functions are available at each status.

Component Type	Component Name	Added / Updated
Lightning Page	TKRL_Project_Record_Default_Page	Added
Lightning Page	TKRL_Sprint_Record_Default_Page	Added
Lightning Page	TKRL_User_Story_Record_Default_Page	Added
Lightning Page	TKRL_Test_Script_Record_Default_Page	Added
Lightning Path	TKR_Project_Path	Added
Lightning Path	TKR_Sprint_Path	Added

Project Management

Change Orders function

We are pleased to introduced a new Change Orders feature, which allows user to create, manage and track change orders and there approvals within Tracker, all linked to a project.

The Change Order function is only available by being granted the *TKR_Tracker_Change_Order* Permission Set. This allows you to keep this information restricted to authorised users only.

When creating a change order, you can record the following information:

- Project
- Summary
- Detailed Description
- Financial Impact Amount (Expenses)
- Financial Impact Amount (Resources)
- Financial Impact Type
- Initial Approver
- Final Approver

When a Change Order is submitted for approval

- The record is locked and is no longer editable for normal users
- The status is updated to "Submitted"
- An email is sent to the initial approver
- A chatter post is sent to the initial approver
- The Initial and Final Approver are granted visibility of the Change Order (Apex Sharing record created)

If the Change Order is recalled then

- The status is set back to "Draft"
- The record is unlocked and becomes editable

When the Initial Approver approves

- The status is updated to Initially Approved
- The next approver is notified by email and chatter

As the "Final Approver" on a change order that has been approved by an Initial Approver, if you approve the change order then

- The status is updated to "Fully Approved"
- The submitter is notified by email the Change Order has been approved

User Story Card – QR Code redirect URL

A new custom setting has been added to allow customers to choose if they want the QR Code on a User Story to direct users to the legacy custom VisualForce page to view/update the User Story record (Status), or direct users to the standard Salesforce mobile app (lightning friendly) to view/update the User Story record.

- TKR QR Code URL
  Allows Customers to choose where a User is directed when they scan a QR code (e.g. to Tracker Custom Page or Standard Salesforce Mobile page). Default is to set as unchecked, so users are directed to Salesforce Mobile page
  - **Enable Custom QR Code Page** - If checked the QR Code URL will direct Users to the custom VisualForce page "QRScan*".
    **Note: This requires a Site to be set up/configured*

Component Type	Component Name	Default Value	Added / Updated
Custom Setting	TKR_QR_Code_URL__c		Added
Custom Setting: Field	TKR_Enable_Custom_QR_Code_Page__c	Unchecked	Added

Test Management

Enable Test Execution Attachments Custom Setting

As we continue to enhance the Test Management functionality we have added a new custom setting to allow Admins to turn on/off the Attachments against Test Executions as follows:

- **TKR Test Execution Attachments**
  This setting is used to enable or disable the "Add Attachment" buttons for each test script step (within a Test Execution) or Attachments related list against the Test Script (execution) itself within the "Run Test Script" page.
  - **Enable Step Attachments Button** - Use to toggle on/off the Add Attachments button for Test Execution Steps in the Run Test page - Checked to enable
  - **Enable Test Execution Attachments** - Use to toggle on/off the Add Attachments related List for Test Scripts (Executions) in the Run Test page - Checked to enable

Component Type	Component Name	Default Value	Added / Updated
Custom Setting	TKR_Test_Execution_Attachments		Added
Custom Setting: Field	TKR_Enable_Attachments_Button__c	Checked	Added
Custom Setting: Field	TKR_Enable_Test_Execution_Attachments__c	Unchecked	Added
Custom Label	TKR_Test_Execution_Attachment	*"Attachments (save execution first)"*	Added

Test Executions with or without Tickets report

Added a new custom report type and report for Test Executions with Test Execution Steps and with or without Tickets associated.

V5.1.26 OEM

Introduction: Version 5.1.26 is an offical release which includes all imcremental changes prepared and tested as part of the beta v5.1.25 and v5.1.24 releases.

General:

Salesforce Lightning Support

As of version 5.1.26 OEM - We are pleased to announce that Tracker now supports Users of the Lightning UI – To get to this point we've reworked a few of the existing features to be fully supported. This marks our first official Lightning compatible version and we plan to further develop lightning capabilities going forward.

Tracker Lightning App

To provide the best lightning experience possible, we've added a specific "Tracker" App only for lightning Users. This allows for specific customisation unique to Lightning UI, including the custom Tracker "Home" page required to mirror the Classic UI homepage within Lightning

- Tracker App (API: DDTracker__TKRL_Tracker)
- Tracker Home Page (Lightning Page: DDTracker__TKRL_Home)

NOTE: Home page should be set as the default to all Tracker Profiles and the standard System Administrator profile. You will need to assign this access after installation through the Lightning App Builder

Sprint Management

Add to Planning Poker – Lightning ready

We have replaced the existing functionality with a new lightning ready version. This works in the same way as the previous version but does so through a visualforce page rather than custom javascript button.

Component Type	Component Name	Object	Added / Updated
Apex Class	TKR_AddToPlanningPokerExtension		Added
Apex Class	Test_TKR_AddToPlanningPokerExtension		Added
VF Page	TKR_AddToPlanningPoker		Added
Custom Button	TKR_Add_to_Planning_Poker	TKR_User_Story__c	Updated

Project Management

Functional Design document – Dynamic User Story Field selection

It is now possible to customise which fields are pulled into the Functional Design document (section 5). This is restricted to any field on the User Story object, but allows an Administrator to remove default fields or add new (custom) fields into the PDF document that gets created as you wish. This is done in the same way as the Technical Design Document, by listing the API names of the fields within the TKR Functional Design Fields custom setting.

Component Type	Component Name	Object	Added/Updated
Apex Class	TKR_DocumentController		Updated

Apex Class	Test_TKR_DocumentController		Updated
VF Page	FunctionalDocumentPDF		Updated
Custom Setting	TKR_Functional_Design_Fields__c		Added
Custom Field	Value__c	TKR_Functional_Design_Fields__c	Added

Test Management

Run Test Scripts – Lightning ready

Adding lightning compatible button on Test Execution detail page. There is a new button added as a substitute to 'Run Test Script' which only shows up in lightning that is pointing to a new Visualforce Page acting as middle layer which then prepares all the required parameters and re-directs the user to another custom Visualforce Page (TKR_runTestScript) which executes the test script.
We have also updated the Run Test Script custom formula field logic whose output is a hyperlink of the same name, that lets a user execute the test script from the related list/reports

Component Type	Component Name	Object	Added / Updated
Apex Class	TKR_NavigateToRunTestScriptExtension		Added
Apex Class	Test_TKR_NavigateToRunTestScriptExtension		Added
VF Page	TKR_NavigateToRunTestScript		Added
Custom Button	TKR_Run_Test_Script	TKR_Test__c	Added
Custom Field	Run_Test_Script__c	TKR_Test__c	Updated

Add Testers to tests – Bulk processing support

As requested… We have updated the Adding Testers to Tests capability to now support bulk creation of testers against tests (e.g. bulkified the trigger that runs when you assign testers against a test script). In this scenario the trigger logic is creates a Test Execution Record for each tester and it's also supposed to create a Test Execution Steps records, which are a clone of Test Execution Steps linked to the test script being assigned.
When we bulk assign a lot of testers and/or against test scripts with a large number of steps, the trigger would be required to insert a number of records depending on number are testers selected and test scripts selected and the steps against those test scripts.
In the trigger we are now performing a calculation, which is equivalent to = TOTAL NUMBER OF TEST SCRIPT + TOTAL NUMBER OF TEST STEPS FOR ALL TEST SCRIPTS TO BE CLONED < 2000, then the trigger will aim to get all the processing done synchronously, (i.e. within the trigger).
If that condition is not satisfied then it will execute an apex batch job, which with then process 10 records at a time until all processing is complete. Once complete an email notification is sent confirming the status of the batch job.

Component Type	Component Name	Object	Added / Updated
Apex Trigger	TKR_CreateTestsForTester		Updated
Apex Class	TKR_CreateTestsForTesterBatch		Added
Apex Class	Test_TKR_CreateTestsForTester		Updated
Email Template	TKR_Run_Test_Script	TKR_Test__c	Added

Security & Administration:

Allow re-parenting to Project

We have updated the following Master–Detail relationships to the Project object, to allow Users to re-parent records to a new Project;

Component	Child Object Name	Object	Added / Updated
Project Lookup relationship field	Epics	DDTracker__TKR_Epic__c	Updated
Project Lookup relationship field	Processes	DDTracker__TKR_Processes__c	Updated
Project Lookup relationship field	User Stories	DDTracker__TKR_User_Story__c	Updated

Security Enhancement: allow creation of child object records for Project

We have updated the standard security on the following Master–Detail relationships to the Project object, to allow Users with "Read Only" permission of the Project record to create new detail records for the a selected Project. *(e.g. Set relationship to Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records);*

Component Type	Component Name	Object	Added / Updated
Master–Detail relationships	Epics	DDTracker__TKR_Epic__c	Updated
Master–Detail relationships	Meetings	DDTracker__TKR_Meeting__c	Updated
Master–Detail relationships	Milestone	DDTracker__TKR_Milestone__c	Updated
Master–Detail relationships	Processes	DDTracker__TKR_Processes__c	Updated
Master–Detail relationships	Sprint	DDTracker__TKR_Sprint__c	Updated
Master–Detail relationships	Test Execution	DDTracker__TKR_Test__c	Updated
Master–Detail relationships	Ticket	DDTracker__TKR_Bug__c	Updated
Master–Detail relationships	User Stories	DDTracker__TKR_User_Story__c	Updated

Tracker Product Support

Process logging Tracker support cases

We have made it easier than ever for licensed customers to submit support cases to us. This is now done through the About Tracker Tab > "Log a Tracker Support case" link.

This link is only visible to profiles granted permission to see it, which we recommend is set only to your System Administrator (or custom system support) profile.
Using this link will direct Users to a web to case page where you can log your support request, either issue, request or question. We will then be able to process your support case appropriately.

V5.1.25 / V5.1.24 OEM

Beta release for testing new features and Lightning compatibility. All items are listed within v5.1.25 OEM

V5.1.23 OEM

General

Salesforce ISV Certification – OEM Licensing

As of this version, Tracker is now an officially recognised OEM licensed product for Salesforce. This means it is now available for purchase from the salesforce app-exchange.

User Story Approval Process - Standardisation

As part of our ISV certification, we have reviewed the use of existing Custom User Story approval process functionality and determined customers would be better served if this was replaced with the use of standard approval process functionality.
As a request we have depricated this feature and replaced with a new User Story Approval Process that leverages Salesforce standard capabilities.

Security & Administration

CRUD/FLS enforced

As part of our ISV certification, we have reviewed the security model and updated the CRUD/FLS enforcement across all aspects of the Tracker Product.
This includes adding enforcement to the following APEX pages:

- *TKR_automateBurndown*
- *TKR_Charts_GanttController.cls*
- *TKR_Controller_PlanningPoker*
- *TKR_UserStoryTriggerClass.cls*
- *TKR_Test_ScriptTriggerClass.cls*
- *TKR_Test_ExecutionTriggerClass.cls*
- *TKR_sprintPlanning.cls*
- *TKR_SequenceTestStepsController.cls*
- *TKR_runTestScriptExtension*
- *TKR_PrioritizeUserStoryController*
- *TKR_MobileQRCodeExtension*
- *TKR_KanbanBoardCntrl*
- *TKR_DocumentController*
- *TKR_DesignTriggerClass*
- *TKR_Charts_GanttController*

Deprecated

- *TKR_SubmitForApproval.cls* ***DEPRICATED***
- *TKR_GLBL_LoginAuthorisationClass* ***DEPRICATED***
- TKR_UserStoryApprovalClass ***DEPRICATED***

Automate Burn down function - Security update

We have reviewed and amended the Automate burndown function in order to make it compliant with CRUD/FLS enforcement and removal of Javascript encoded button. This also includes removing potential DOM XSS exploit vulnerability with in page scripting

Documents Generator Controller APEX - Security update

We have reviewed and amended the DocumentGenerator APEX class in order to make it compliant with CRUD/FLS enforcement

Sprint Management

Delete Burndown Stats button

Added to the page layout the delete button for burn down stats. This is to make it easier to administrate Burn down stat data should you need to recreate or adjust due to changes in your sprint timeline/capacity

User Stories with/without Designs report

Added a new custom report for User Stories with or without designs linked to them. This allows Project Managers, Scrum Masters, Dev leads etc to quickly view which User Stories have design(s) and which do not

Test Management

Test Execution Workflow: status field update

We have updated the test execution workflow logic to correctly update the Test Execution Status field once the test execution is complete

Enhanced Test Template fields

Based on feedback, we have enhanced the Test Templates (test scripts) object to include the following new fields

Component Type	Component Name	Object	Added/Updated
Custom Field	TKR_Pre_requisites__c Purpose: Details on any pre-requisites or set up steps to enable the test to be executed (For Example: Pre-requisites actions, test data or testing permissions/profiles required)	TKR_Test_Templates__c	Added
Custom Field	[test] Title__c Increase title size to 255 characters	TKR_Test_Templates__c	Updated

Custom field	Related_Tickets__c Custom formula field that displays as an icon if there are tickets logged against a Tet execution step. Icon is displayed in Test Excution Visualforce page	TKR_Test_Steps__c	Added

My Test Executions (awaiting execution) Report

We have added an additional My Test Executions report that specifically filters to only show executions not yet complete. This is to make it easier for Testers to easily identify which test executions are awaiting action.

PRE OEM Release Log

V5.1.18

Sprint Management:

Custom label for "Functional Area"

A new custom label TKR_Functional_Area has been added to the Sprint planning and document generator features to allow renaming (through translation override) of the term "Functional Area". This is part of our continued move toward use of custom settings and labels in place of hard coded values

Custom label for "Filter By Sprint"

A new custom label TKR_Filter By Sprint has been added to the Sprint planning feature to allow renaming (through translation override) of the term "Filter By Sprint". This is part of our continued move toward use of custom settings and labels in place of hard coded values

V5.1.17

Test Management:

Test Executions "My Tests" Report

A new report has been added to allow Testers to see all test executions assigned to them. This is based on the running user of the report matching the Assigned Tester for a test execution record

Test Executions "Tester Check" field added

A new custom field has been added to Test Executions object > DDTracker__Tester_Check__c. This field is available for use in report filters

Test Script Steps > Clone Button added

The clone button has been enabled on the Test Script Steps > Page Layout – This will allow for a Test Script Step record to be cloned

Test Script Steps > Test Script Lookup field updated

Update to the Test Script Steps > Test Script field - Reparenting feature is now enabled to allow Test Script Steps (Child) records to be reparented to another Test Script (parent) records after they are created or cloned

Test Scripts with Test Executions Report Type updated

Update to include the display new field Tester_Check__c

Test Executions Report Type updated

Update to include the display new field Tester_Check__c

Sprint Management:

Designs records support for User Interface / Lightning

A new custom rich text area field TKR_User_Interface_UI has been added to the Design object. This is designed to support the capture of User Interface (UI) and/or Lightning components within the design record.

This field has also been added to Design History records and available within the Technical Design document (PDF) within the Document Generator feature.

Design History Object reporting

Update to the Design History Object to allow reporting on the Design History records

Project Management:

Decisions & Questions Assigned notification

To assist in knowing when a Question or decision has been assigend, a new workflow with email alert has been added to notify the Assignee

Decisions & Questions "All Decisions & Questions" list View

A new list view has been added for "All Decision & Questions" to show the complete view of records logged under the Decisions & Questions object

References display of Document ID field updated

Update to the References page layout to include the Document_ID field in the display

V5.1.16 (formerly 5.1.0.10)

Alignment of Version Numbering

This has been implemented to mirror that version number automatically generated by Salesforce Development organisation (moving from 5.1.0.10 to now be 5.1.16).

Custom Labels for "In Sprint" and "Out Of Sprint"

Within the Sprint Planning feature – Added values for "in sprint" and "out of sprint" as custom labels used in the sprint planning page. This is part of our continued move toward use of custom settings and labels in place of hard coded values

V5.1.0.9

Sprint Planning Rank and Priority sorting

Within the Sprint Planning feature – Users can now sort the User Stories based on their "Priority" (as set by the Product Owner on the User Story Record) or the "Rank" as set within the User Story Prioritisation feature by the Scrum Master during sprint planning.

V5.1.0.8

Status Reports User Story filtering

Within the Status Report feature - when the "Sprint" value has been set on Status Report record, the User Stories available for the report are now filtered based on their "Allocated Sprint" value.

V5.1.0.7

Security Scanner recommendations implemented

Minor code enhancements made to the following items to align with the Salesforce Security scanner/checkmark assessment recommendations.

APEX Triggers:

TKR_USpointsRollUptoSprint

TKR_UserStoryTrigger

APEX classes:

TKR_DocumentController
TKR_KanbanBoardCntrl
TKR_PlanningPoker
TKR_Charts_GanttController
Siteregistercontroller
Test_TKR_SubmitForApproval
Test_TKR_burndown
Test_TKR_CommitInboundEmailHandler
Test_TKR_ReportStatusWizardExtension
Test_TKR_SCMCommitAutomatedLinkTrigger
Test_TKR_createTestsForTester
Test_TKR_MobileQRCodeExtension
Test_TKR_KanbanBoard
Test_TKR_DocumentController
Test_TKR_SequenceTestStepsController

Pages:

TKR_User_Story_Acceptance

V5.1.0.6

Custom Settings for Document Generator configuration

A number of new custom settings have been added to allow for greater flexibility in selecting which fields should be included in the Functional and technical document generator feature (PDF).

- Custom Setting: Functional Document Descriptions
- Custom Setting: Data Design Fields
- Custom Setting: Integration Design Fields
- Custom Setting: Sprint Design Fields

Aligning to this, we have deprecated the corresponding Custom Label versions previously used for limited Document Generator configuration

- *Security: Tracker Lite User Profile* - Added the Tracker Lite User Profile Designed for extended network/basic users of Tracker. Grants access only to core tabs: Home, Chatter, Project, Meetings, Decisions & Questions, Risks & Issues, User Stories, Designs, Reports and Dashboards

- *Test Management Dashboard and reports* – We have added a new Tracker: Test Management dashboard with several related reports.

- *Ticket Management Dashboard and reports* – We have added a new Tracker: Ticket Management dashboard with several related reports.

- *Definitions Object remodelling* – We have added a larger text area field added for definition value entered. This now allows for 255 characters to be entered.
  The core fields now available are: Term/acronym (Name field text(80)) and Definition (text area(255)).
  IMPORTANT: Post installation, you will need to review and update all definition records (stored in the TKR_Definition object) that exist, to migrate any previous values into this new structure.

Previous field mapping	New field mapping

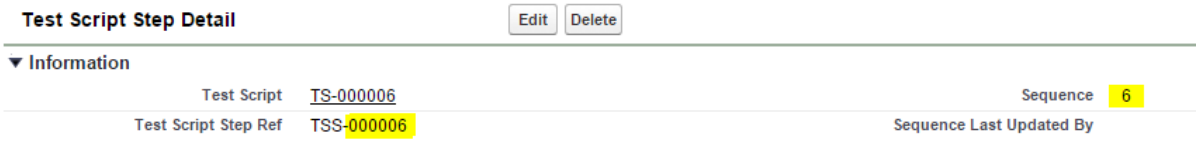
Name	*DDTracker__Definition__c*
DDTracker__Term_Acronym__c	*Name*

V5.1.0.5

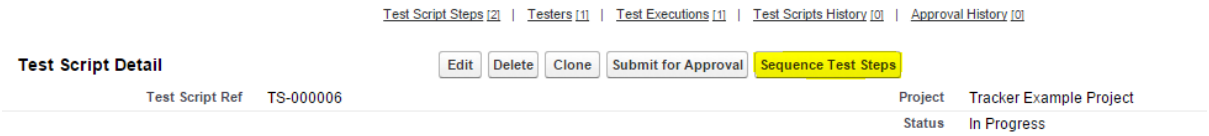
Test Script Steps sequencer

You can now use the Test Script Steps Sequencer feature to “drag and drop” the order of the test script steps. This order can also be manually determined by populating the “Sequence” field on the test script steps record with a numerical value.

For Each Test Script Step record:
If no value is entered in the “Sequence” field, a workflow (TKR_Test_Script_Step_Sequencer) will trigger to pre populate the field with the value of the records “Test Script Step Ref” *(see example below)*



Using the Test Scripts Sequencer:
To access the Test Script Steps Sequence, click on the “Sequence Test Steps” button, located on the Test Script record.



Once in the sequencer page, simply drag and drop the order of the Test Script Steps as required. The select the “Save & Close” button. Upon saving **all** records will have their sequence value automatically updated to reflect the new order.

Issues Fixed

V5.1.35

Security & Administration:

Tracker Permission Set Updates

The following critical changes have been made to the following Tracker Permissions Sets in order to better support multi project teams within a shared Tracker org. This allows teams to configure the correct level of access via Standard Salesforce Sharing Rules.

- Tracker Scrum Master
- Tracker Test Manager

Detailed of each permission change is as follows:

Tracker SCRUM Master

Component Type	Component Name	Object	Added / Updated
Object	View All	Environments	Removed
Object	Modify All	Environments	Removed
Object	View All	Environment Releases	Removed
Object	Modify All	Environment Releases	
Object	View All	Epics	
Object	Modify All	Epics	
Object	View All	Planning Poker	
Object	Modify All	Planning Poker	
Object	View All	Planning Poker Session Contents	
Object	Modify All	Planning Poker Session Contents	
Object	View All	Planning Poker Session Users	
Object	Modify All	Planning Poker Session Users	
Object	View All	Planning Poker Votes	
Object	Modify All	Planning Poker Votes	
Object	View All	Releases	
Object	Modify All	Releases	
Object	Delete	Releases	
Object	View All	Risks & Issues	
Object	Modify All	Risks & Issues	

Tracker Test Manager

Component Type	Component Name	Object	Added / Updated
Object	View All	Test/Ticket Links	Removed
Object	Modify All	Tickets	Removed

Sprint Management

Sprint Total Allocated Story Points

The Sprint Total Allocated Story Point calculation has been fixed to now correctly work whenever User Stories are allocated or removed from the a [Allocated] Sprint

Design History

The design history records have been updated to include all core fields from the Design record. These get created whenever a Design record is submitted into the Design approval process

Test Management

Alignment of Test Phase picklist values

We have updated the Test Phase picklist values on the Tester, Test Execution and Ticket Objects to ensure they correctly align across the tool.

V5.1.33

Security & Administration:

Tracker Permission Set Updates

The following critical changes have been made to the following Tracker Permissions Sets in order to better support multi project teams within a shared Tracker org. This allows teams to configure the correct level of access via Standard Salesforce Sharing Rules.

- Tracker Release Manager
- Tracker Scrum Master
- Tracker Test Manager

Detailed of each permission change is as follows:

Tracker Release Manager

Component Type	Component Name	Object	Added / Updated
Object	Read	Project	Added
Object	View All	Environment Releases	Removed
Object	Modify All	Environment Releases	Removed
Object	View All	Environment	Removed
Object	Modify All	Environment	Removed
Object	View All	Releases	Removed
Object	Modify All	Releases	Removed
Object	Read	User Stories	Added

Tracker SCRUM Master

Component Type	Component Name	Object	Added / Updated

Object	View All	Project	Removed
Object	View All	User Stories	Removed
Object	Modify All	User Stories	Removed
Field	Approval Date	User Stories	Edit Access
Field	Approver	User Stories	Edit Access
Object	View All	User Story AC/CC History	Removed
Object	Modify All	User Story AC/CC History	Removed
Object	Delete	User Story AC/CC History	Removed
Object	View All	User Story Approval History	Removed
Object	Modify All	User Story Approval History	Removed
Object	Delete	User Story Approval History	Removed
Object	Optimum Burndown	Burndown Stats	Edit Access

Tracker Test Manager

Component Type	Component Name	Object	Added / Updated
Object	View All	User Stories	Removed
Object	Modify All	User Stories	Removed
Object	View All	Project	Removed
Field	Project Description	Project	Read Access
Field	Project Owner	Project	Read Access
Field	Reference Number	Project	Read Access
Object	View All	User Stories	Removed
Field	Sprint Tester	User Stories	Edit Access
Field	Status	User Stories	Read Access
Object	View All	Testers	Removed
Object	Modify All	Testers	Removed
Object	View All	Test Execution History	Removed
Object	Modify All	Test Execution History	Removed
Object	View All	Test Execution	Removed
Object	Modify All	Test Execution	Removed
Object	View All	Test Execution Steps	Removed
Object	Modify All	Test Execution Steps	Removed
Object	View All	Test Scripts	Removed
Object	Modify All	Test Scripts	Removed
Object	View All	Test Scripts History	Removed
Object	Modify All	Test Scripts History	Removed
Object	View All	Test Scripts Steps	Removed
Object	Modify All	Test Scripts Steps	Removed

Test Management:

Test Executions > Sort order of Steps

Fixed the issue where Test Script Steps over a step number of “99”, wouldn’t display in the correct sorted order. A new field on Test Execution step object Sequence_AS_Number__c (Formula(Num))

has been added and is used within the APEX code to correctly sort the order of steps in test execution page

Run Test Executions: Max length on Comments error

The issue where the Comments maximum characters of 255 was not being enforced by the Run Test Script execution Lightning Web Component has been resolved. This will now prevent users from being able to enter more than 255 characters within the Comments field.

V5.1.30

Test Management:

Test Executions > Steps Completed logic

DDTracker__Steps_Completed__c updated to fix error in formula logic on calculation field

Document Generator:

User Story Card – QR Code redirect URL

TKR_Document_Generator updated to fix an error when switching between the QRCode standard URL or custom VF page URL within the User Story Cards pdf output

V5.1.29

Security & Administration:

Tracker Profiles now Lightning Enabled

All profiles now have Lightning Experience enabled

Tracker Profiles missing Lightning Buttons

Fixed issue where Tracker Standard and Tracker Lite profiles were missing the permission for the new lightning buttons:

- Add to Planning Poker functionality button
- Run Test Script (Executions) button

Test Management

Test Execution Step Comments – 255 chars validation

Fixed the issue where the validation rule for Comments over 255 characters on the Test Execution Step was not alerting users.

Ticket field renamed

To provide greater clarity we have relabel the field "Script Number" to "Script Step Number".

General

Email Notification Templates

The following Tracker email notification templates used by workflows now include "Project" Reference to help usage of team across multiple projects:

- TKR Change Order Approval Request
- TKR Change Order Status Change Notification
- TKR Decision-Question Assigned
- TKR Design Approval Request - Mobile Friendly
- TKR Release Approval - Mobile Friendly
- TKR Release Approved - Mobile Friendly
- TKR Release Rejected - Mobile Friendly
- TKR Risk or Issue Assigned
- TKR Test Execution Approval Request - Mobile Friendly
- TKR Test Script Approval Request - Mobile Friendly
- TKR Test Script Rejection Message
- TKR Test Script Rejection Message - Mobile Friendly
- TKR US Developer Assigned - Mobile Friendly
- TKR User Story Passed - Mobile Friendly
- TKR User Story Ready for Test - Mobile Friendly
- TKR User Story Rejection Template to BA - Mobile Friendly
- TKR User Story Rejection Template to Submitter - Mobile Friendly
- TKR User Story Template Business Quality - Mobile Friendly
- TKR User Story Template Computer Systems Quality
- TKR User Story Template Computer Systems Quality - Mobile Friendly
- TKR User Story Template System Custodian - Mobile Friendly
- TKR User Story Template System Owner - Mobile Friendly

V5.1.26

General

About Tracker Supporting Document Links

Broken supporting document links within About Tracker tab – Due to a change in the domain names where these were originally hosted, the links had to be updated to a new URL

Test Management

Spelling error on Tickets Page layout

Correction made to a word within the page layout of the Tickets object

V5.1.23

Project Management

User Story: Full User Story formula text

Updated User_Story.Full_User_Story__c formula field to insert a line break before the "So That" value.

V5.1.18

Test Classes

Test_TKR_Design_ Trigger Class error

Issue occurred with orgs that do not have “chatter only” profile, as the test class > test data referenced this. Reference updated to standard “System Administrator” profile

Test_TKR_SubmitForApproval class error

Issue occurred with orgs that do not have “Great Britain” Country value on the User Object, as the test class > test data referenced this. Reference removed

V5.1.17

Test Management

Test Executions percentage % Passed error

Issue with the Test Execution Percentage passed % caused when the percentage value = 0% has been fixed. This fix changed the formula to only calculate if Total_Steps is greater than 0

Sprint Management

User Story (Kanban) Cards display of Business Analyst

Issue with the User Story Cards (TKR_GenerateCard) not correctly display the “Business Analyst” field value taken from the User Story record on the PDF card

Technical Design Document display of References values

Issue with the Technical Design Document (PDF) not displaying References values

Project Management

Status Report Generator Sprint filter restriction on Milestones

Issue with the Status Reports Generator feature where if a s Sprint value was entered only milestones with the same sprint value would be displayed. We have removed “Sprint” restriction, so that All Milestones are returned into the report, unless filtered out through the filters (status/date filters)

V5.1.16 (formerly V5.1.0.10)

Sprint Planning Page resizing

Issue with page width/resizing causing User Story details to overlap or display several per column. Have fixed the width of the I”in Sprint” and “out of Sprint” columns to ensure optimal display on screen

Sprint Planning calculation of capacity

Capacity calculations for “Story Points (Other)” not correctly calculating values

Sprint Planning Story Point (SP) (on User Story cards)

Story Point value displayed on User Story cards now shows total for the User Story not just Story Points (SFDC) value

Help Text changes

- User Story > Help text correction on "Business Quality Approved" field
- User Story > Help text correction on "Computer Systems Quality Approved" field
- User Story > Help text correction on "Susyem Custodian Approved" field
- User Story > Help text correction on "system Owner Approved" field
- User Story > Help text to "App" field reworded for improved clarity field

V5.1.0.9

Project Gantt Chart view not displaying correctly

Due to a security enhancement the Gantt chart stopped displaying. Update made to correct this issue.

Deprecated items

Deprecate redundant Permission Sets

V5.1.0.8

Status Reports – Risks and Issues filtering in report

Previously, if you set a "Sprint" value on the Status Report record, the Risks & Issues available to be included were restricted based on them being linked to User Stories that where allocated to the same Sprint records.
This fix removes this restriction so all Risk/Issue linked to the project will be available for the status report (subject to filtering when generating the report).

Status Report PDF – Not wrapping correctly in chrome

In the latest Chrome browser version (Version 44.0.2403.125) the Status Report PDF was not correctly wrapping the table columns. This is now resolved.

Status Reports Icons displaying in different sizes in word.doc format

The icons in the PDF and MS Word versions of the status report have now been set to a fixed size for consistency

Icon for Budget status now displaying

The Budget status icon display issue has now been resolved.
For the display of icons please refer to the Custom Settings > set up actions required as part of this fix (see below).

Document Generator bug fixed when attempting to filter USs

The SOQL error that occurred when selecting User Stories to be filtered / selected is now fixed.

v5.1.0.7

User Story Approval submissions – Not submitting

This was due to an error when the "As A" field had multiple values exceeding a character limit on the User Story Approvals History (DDTracker__TKR_User_Story_Approval_History__c) record. To correct this a new field was required/created "DDTracker_As_A__c". Please note the previous field "DDTracker_As_A_text__c" has: been deprecated – but not deleted removed from the page layout – but still reportable.

We recommend you copy the value for the DDTracker_As_A_text__c field into the new DDTracker_As_A__c field.

Note: Post installation of v5.1.0.7 all newly created User Story Approvals History records will automatically populate the DDTracker_As_A__c, and no longer populate the DDTracker_As_A_text__c field.

Test Execution Script Steps - Test/Tickets Links Related List – "New Ticket" Button

Button now correctly takes user to a new ticket record

Release Completeness indicator - not updatable on Ticket object

The change in state was not saved to the field is when saving a record.

Note: The Release Indicator is controlled by workflow. We also do NOT recommend placing the Release Indicator check box on the page layout, as this field is an internal working field only.

Required fields to be populated have been aligned on the page layout and include:

```
Release Steps (Automated)
Release Steps (Manual)
Fixed in
Version
Validation Steps
```

Adding a "related ticket" record to a ticket

Results in an error message to the user when attempting to save the new "related ticket" record.

Updated page layout to display the [required] "Related Ticket" field for populating in order to save the record correctly.

Add to Planning Poker without selecting and User Stories

This would cause a javascript error - Error now correctly handled with appropriate alert to the User to select at least one User Story to proceed

Update "Defect" references

Several areas within the Test Management app still had references to "defects". These have been renamed to "Tickets" in line with the rest of the application

No information/data shown in Instructions section when editing a test execution step

No instructions or details/actions being shown for a test script step when editing the step after execution has started.

This is caused only in "Edit" mode as the Instruction field is a formula field, these do not display/render when in "Edit" mode. We have removed the "Instructions" section from the "Edit" page layout to avoid confusion. We also recommend using the "Execute Test" feature rather than individually editing Test Execution Steps.

v5.1.0.6

Tracker Permission Sets Licensing

Updated the standard Tracker Permissions Sets to remove pre-set licensing requirements

User Story Cards labels

Corrected misaligned field labels for Product Owner and Business Analyst on the User Story Cards PDF document to match field names on User Story object

Document Generator Epics field display fix

Now displaying the Epic Ref and [full] Epic name within the document details
NOTE: The Scope table only displays the Epic Ref value

Burndown chart fix

To correctly draw the burn down stats values irrespective of Users locale