

TesterX

User Guide

General Information

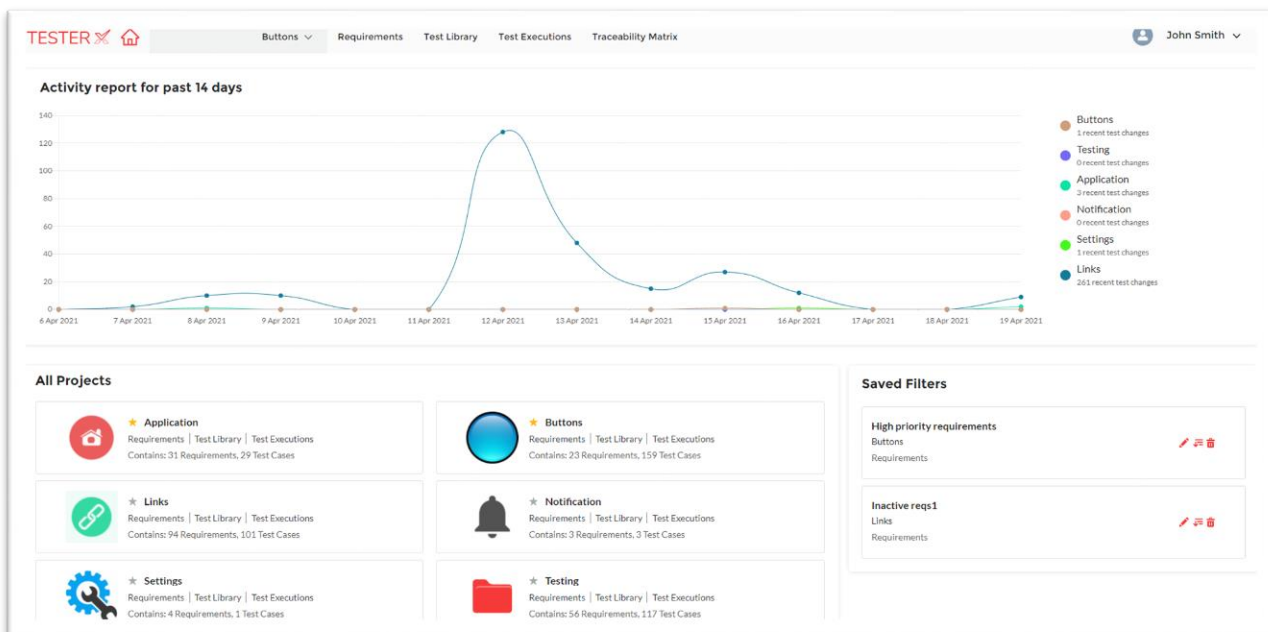
Application Overview

User Types

Home Page

Overview

The Home page is a landing page of the TesterX app. Here users can find all the projects that are available for them, check recent activity for available projects and see saved filters for all their projects.



Recent Activity

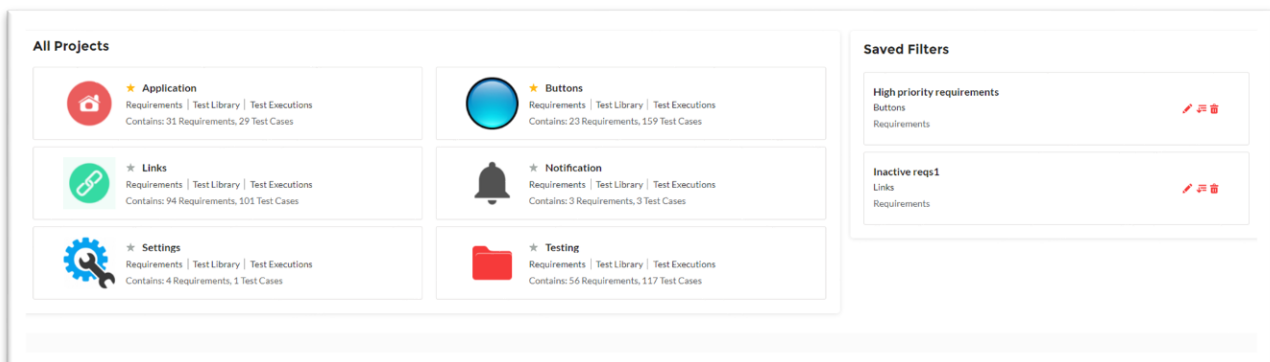
The recent activities chart shows a brief overview of how active are available projects including all the record updates made during the last 14 days for each available project. Users are able to strike out any project by clicking on its name on chart legend.



Available Projects

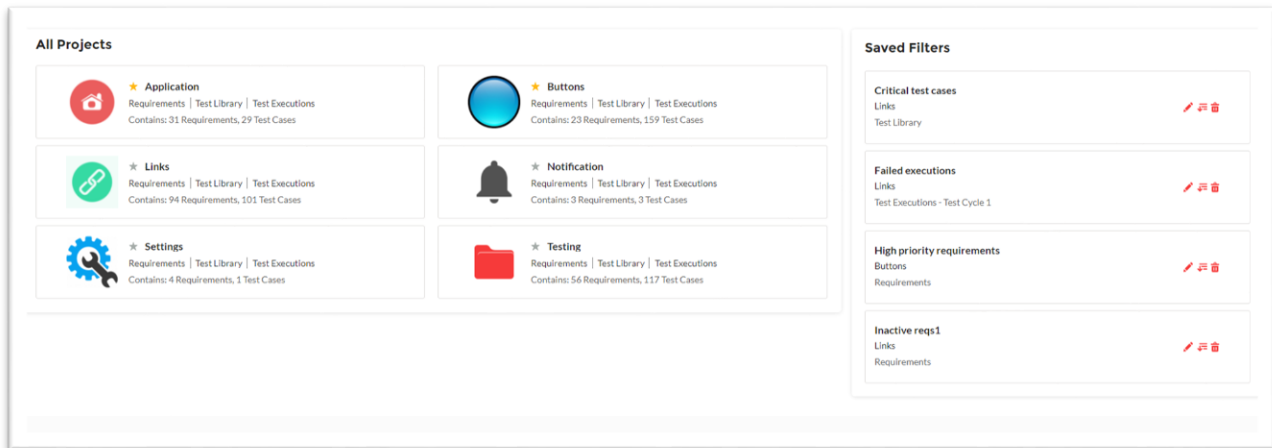
Users can find all available projects at the bottom of the Home page along with a brief info for each project including total number of requirements and test cases related to that project. App Admin users are able to see the complete list of projects available in the system while non-admin users are able to see only those projects they are assigned to.

Users are able to open the project details page by clicking on the project name and navigate to any related object like requirements or test cases using a corresponding link below the project name.



Saved Filters

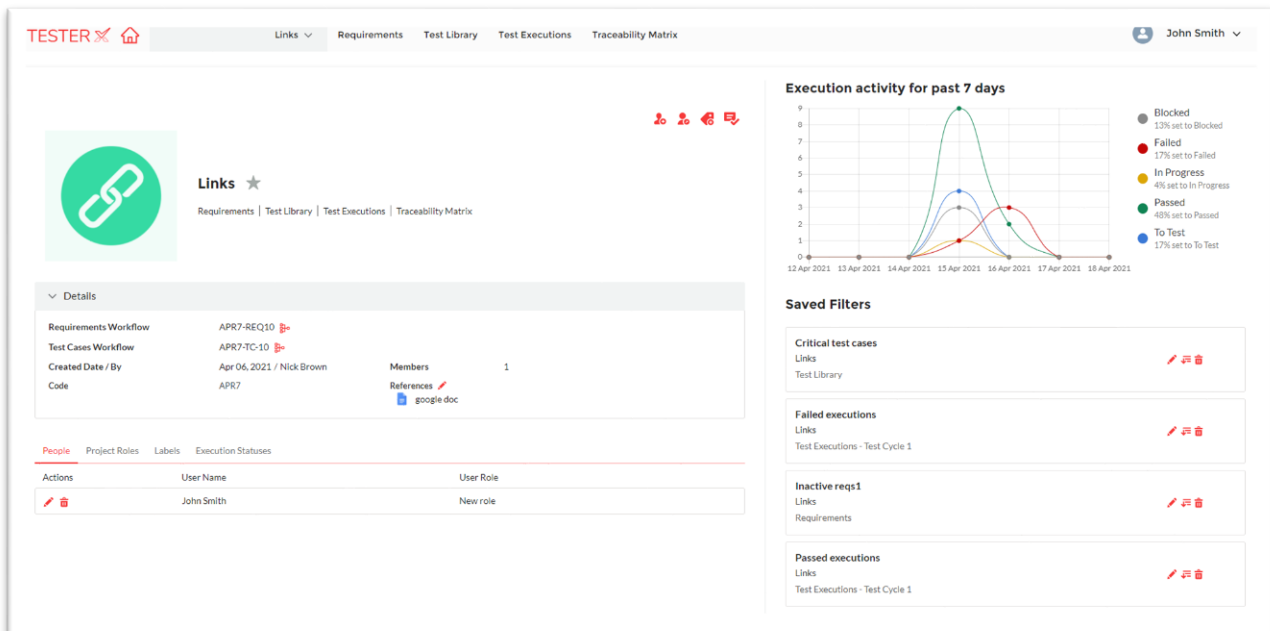
Section 'Saved Filters' shows the list of filters that are used on the projects. Admin users are able to see and use all filters saved by them, non - admin users are able to see and use only the list of filters for the projects that they saved. Here users have a possibility to change, delete and apply filters. Each filter contains the following information: filter's name, the name of the project where it was created and particular tab.



Projects

Each project has its own detail page, where users can find all necessary information about certain project and manage it.

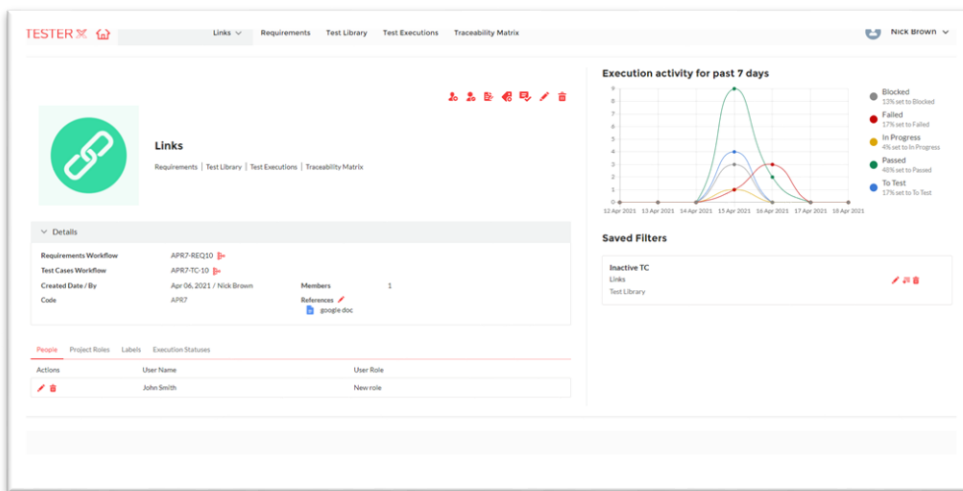
Project's detail page displays the main information about the project, such details as: workflows for requirements and test cases, project's code, quantity of members, created date/by and ability to paste the references. On the project's detail page users also are able to see the mini diagram of execution activities and section 'Saved Filters'. There are filters that are used for this project only on the project's detail page.



Users are able to perform the variety of actions on project's detail page:

- add users
- add roles
- add new statuses
- add new label
- add the project to favorites (only Non-admin users)
- edit projects
- edit list views (only Admin users)

Users are able to do that, using buttons at the top of the detail page. Admin users are able to edit/delete project, Non-admin users don't have such ability.



'Edit list views' button allows users to manage list view for Requirements, Test Library and Test Executions tabs. The button helps to determine what fields will be shown on each of the tab list view.

Edit List Views

Requirements Test Library Test Executions

Available

Created By
Created Date
Currency ISO Code
Description
External
JIRA Item Id
Label

Visible

Status
Priority
Type
Last Modified Date
Assignee

Save

Set Default

Cancel

Users are able to return to the home page, using the 'Back to home' button.

The user's ability to perform actions is defined by particular role and permissions in it.

From the home page users are able to navigate to following tabs: Requirements, Test Library, Test Executions, Traceability Matrix.

TESTER 

Links ▾ Requirements Test Library Test Executions Traceability Matrix

 Nick Brown ▾

At the left bottom corner users are able to observe several tabs: People, Project Roles, Labels, Execution Statuses.

People tab represents Users that were created for the project. Here users are able to edit and delete people.

People Project Roles Labels Execution Statuses

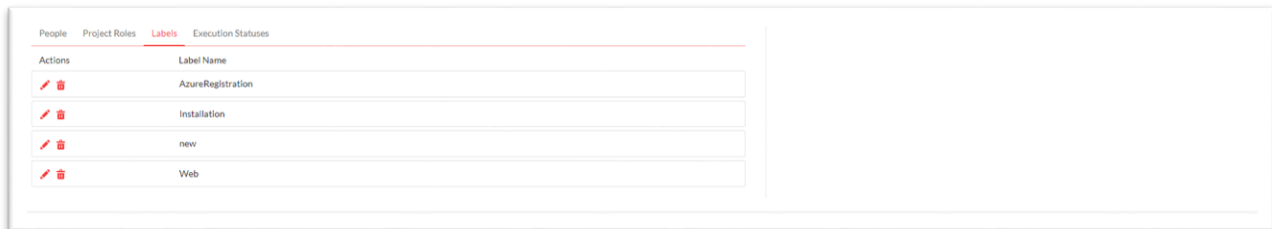
Actions	User Name	User Role
 	John Smith	New role

Project roles is a tab where project's roles are stored and where users can manage their permissions: basic and for each tab. Here users are able to edit, delete and copy the project's role.

People Project Roles Labels Execution Statuses

Actions	User Role	Role Assignments
  	New role	1

Labels tab contains all created labels on the project, here users have a possibility edit and delete them.



Actions	Label Name
 	AzureRegistration
 	Installation
 	new
 	Web

Execution Statuses tab displays all execution statuses that are in the project, also users are able to define the default status, edit and delete them.



Actions	Is Default	Color	Status
 	☐		Blocked
 	☐		Failed
 	☐		In Progress
 	☐		Passed
 	☒		To Test

Requirements

Overview

Requirements tab is a storage for test case's requirements, where users can create and manage them.

In order to perform all of Requirements tab actions, Non-admin users should have a specific role and permissions that define it.

Users are able to create Requirements and Folders for them, using main buttons 'New Requirement' and 'New Folder' at the top of the page.

Requirements can be displayed in three views:

-  Tree
-  List
-  Group

	Actions	Status	Priority	Type	Last Modified Date	Assignee
1						
Imported						
2						
APR7R-21 Web - html,html ONLINE		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-22 Upload from box.com		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-23 Upload from drive.google.com		Active	Critical	Limitation	Apr 19, 2021	Nick Brown
APR7R-24 Upload from dropbox.com		Skipped	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-25 Multiselect uploading		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-26 Screen Only		Active	Medium	Functional Requirement	Apr 19, 2021	John Smith
APR7R-27 ScreenTrac - Settings		Active	High	Functional Requirement	Apr 19, 2021	Nick Brown
APR7R-29 MP4 Player - mp4 and webm		Active	High	Functional Requirement	Apr 19, 2021	Nick Brown
APR7R-30 MP4 Player - "In Progress" Screen		Active	Medium	Functional Requirement	Apr 19, 2021	John Smith
APR7R-31 MP4 Player - playing video files after conversion		Active	Medium	Functional Requirement	Apr 19, 2021	John Smith
APR7R-32 MP4 Player - mp4 with subtitles		Active	High	Functional Requirement	Apr 19, 2021	John Smith
APR7R-33 PDF Player - launching PDF		Inactive	Medium	Functional Requirement	Apr 19, 2021	John Smith
APR7R-34 Vimeo Player - launching Vimeo		Active	High	Functional Requirement	Apr 19, 2021	John Smith
APR7R-35 Vidyad Player - launching Vidyad		Active	Medium	Functional Requirement	Apr 19, 2021	John Smith
APR7R-36 launching HTML uploaded from Web		Active	Medium	Functional Requirement	Apr 19, 2021	John Smith
APR7R-45 Registration Domain		Active	Low	Business Rule	Apr 19, 2021	John Smith
APR7R-43 Enable PDF Download		Inactive	Low	Data Requirement	Apr 19, 2021	John Smith
APR7R-44 External Services		Active	High	Business Rule	Apr 19, 2021	Nick Brown
APR7R-47 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-48 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-49 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-51 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	Business Rule	Apr 19, 2021	John Smith

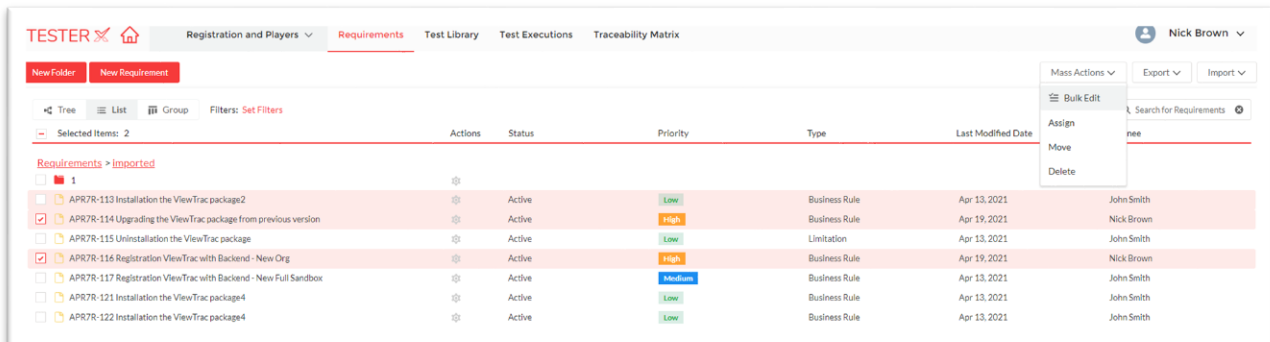
Tree list view displays folders and records in it and only records which are in the Root folder (main folder).

	Actions	Status	Priority	Type	Last Modified Date	Assignee
1						
Imported						
2						
APR7R-21 Web - html,html ONLINE		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-22 Upload from box.com		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-23 Upload from drive.google.com		Active	Critical	Limitation	Apr 19, 2021	Nick Brown
APR7R-24 Upload from dropbox.com		Skipped	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-25 Multiselect uploading		Active	Medium	Business Rule	Apr 19, 2021	John Smith

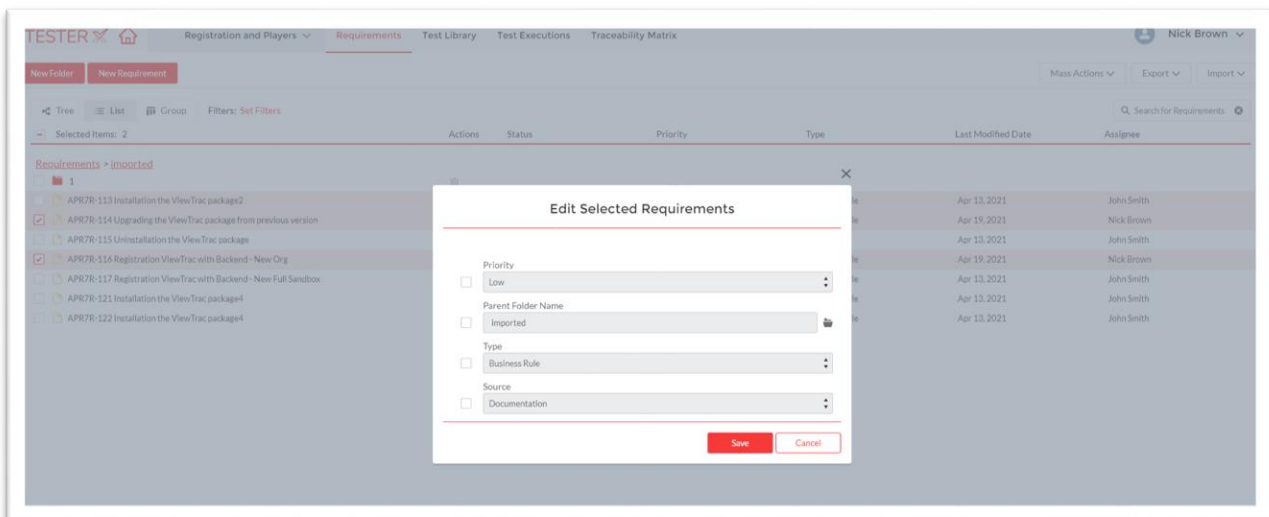
List View displays the same as Tree View and gives users an ability to work with one folder only and it allows users not to distract attention to other data.

	Actions	Status	Priority	Type	Last Modified Date	Assignee
Requirements > Imported						
1						
APR7R-113 Installation the ViewTrac package2		Active	Low	Business Rule	Apr 13, 2021	John Smith
APR7R-114 Upgrading the ViewTrac package from previous version		Active	High	Business Rule	Apr 19, 2021	Nick Brown
APR7R-115 Uninstallation the ViewTrac package		Active	Low	Limitation	Apr 13, 2021	John Smith
APR7R-116 Registration ViewTrac with Backend - New Org		Active	High	Business Rule	Apr 19, 2021	Nick Brown
APR7R-117 Registration ViewTrac with Backend - New Full Sandbox		Active	Medium	Business Rule	Apr 13, 2021	John Smith
APR7R-121 Installation the ViewTrac package4		Active	Low	Business Rule	Apr 13, 2021	John Smith
APR7R-122 Installation the ViewTrac package4		Active	Low	Business Rule	Apr 13, 2021	John Smith

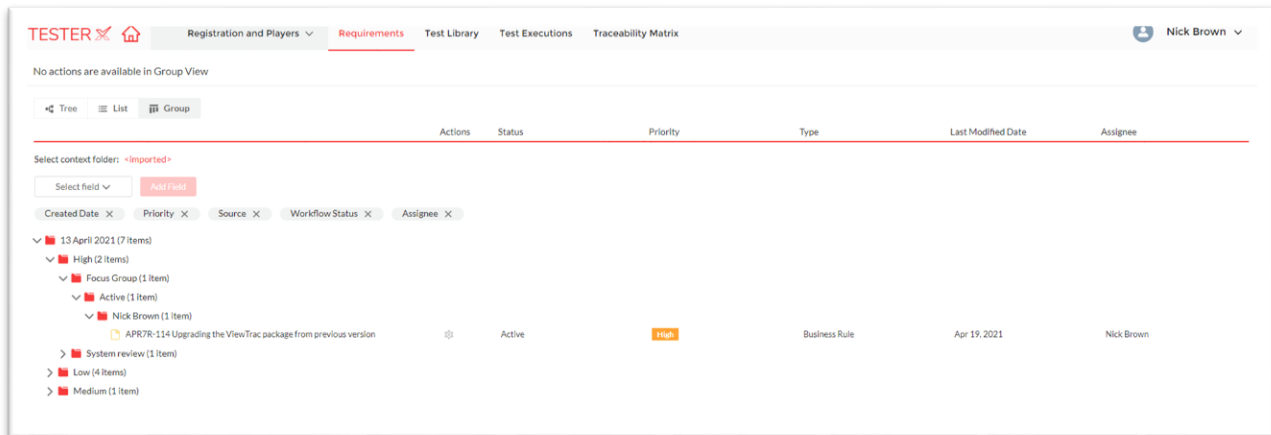
Also List view gives users a possibility to use 'Mass Action' Button only for record. The functionality isn't available for folders.



Clicking by List view users are able to check necessary records for Mass Update. After checking records click 'Mass Action', choose 'Bulk edit'. Select a field or several fields for checked records and make changes of field's value. Save changes. 'Bulk edit' allows users to make the same changes for several records at the same time.



Group View allows users to group records by fields, using a particular folder. Select the context folder and add fields for grouping (max 5). Confirm the results.

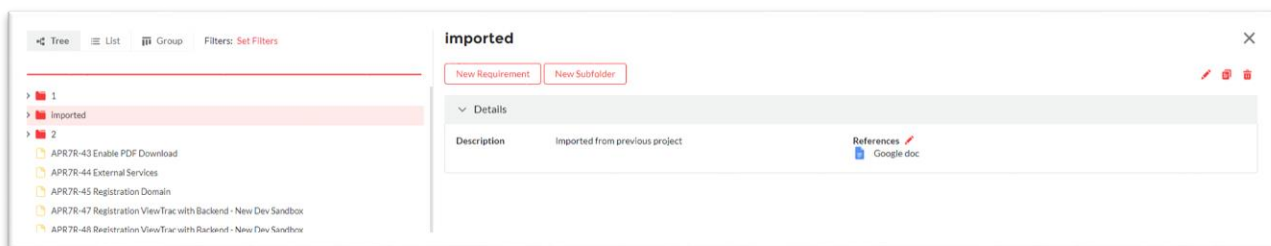


Folder's and Requirements detail page is open by double clicking on it.

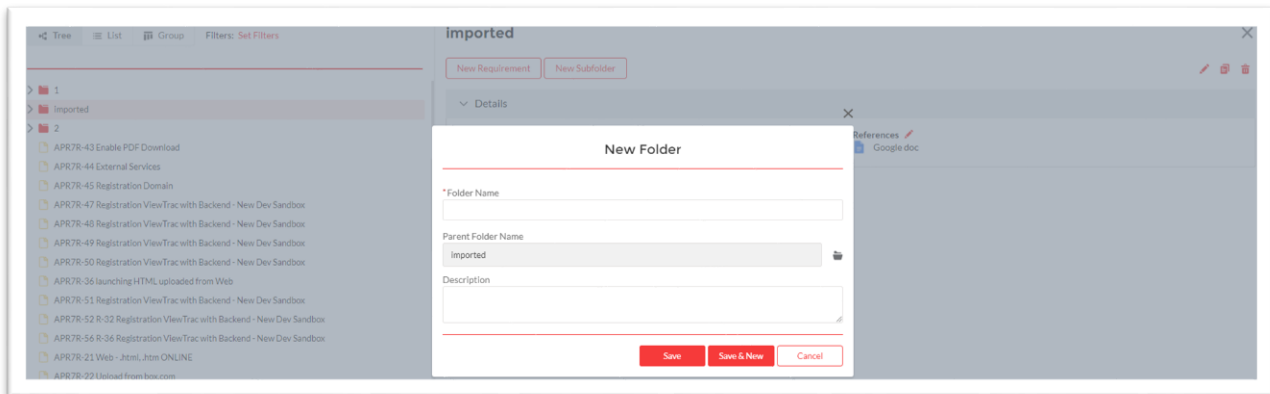
Users are able to create new requirement, using the main button 'New Requirement' at the top of the page and the button also is on the folder's detail page.

Folder's detail page contains the following information:

- folder's description
- ability to paste references
- delete
- clone
- edit
- 'New Subfolder' creation button
- 'New Requirement' creation button



Users can create a subfolder on the folder detail page, in order to build folder's hierarchies.



While cloning a requirement record, users can specify the number of copied records (max 99). 'Clone relationships with test cases' checkbox allows users to preserve all relationships between requirements and test cases in cloned record.

Requirement cloning

* Name

Web - .html, .htm ONLINE

Parent Folder Name

Root Folder

* Enter a number of copies

1

☒ Clone relationships with test cases?

Clone

Cancel

Users are able to clone requirement Folder in several ways:

- Clone folder with its records only
- Clone folder with its records and records from subfolders without preserving folder's hierarchy
- Clone folder with its records and records from subfolders with preserving folder's hierarchy

Requirement cloning

* Name

Parent Folder Name



* Enter a number of copies

☒ Clone relationships with test cases?

CloneCancel

While cloning records and folders users are able to choose the parent folder.

Select Folder

Root Folder

> 1

> Imported

> 2

Save

New Subfolder

Cancel

Select Folder

Child folders for that folder are not shown on the list

Root Folder

> 1

> Imported

> 2

Save

New Subfolder

Cancel

To perform all actions from the folder's detail page, users can use the gear menu as well.

The screenshot shows the 'Requirements' tab in the TESTER application. A list of requirements is displayed with columns for Actions, Status, Priority, Type, Last Modified Date, and Assignee. A context menu is open over the requirement 'APR7R-21 Web - .html, .htm ONLINE', showing options: New Requirement, New Subfolder, Edit Folder, Clone Folder, and Delete Folder.

Actions	Status	Priority	Type	Last Modified Date	Assignee
New Requirement	Inactive	Low	Data Requirement	Apr 19, 2021	John Smith
New Subfolder	Active	High	Business Rule	Apr 19, 2021	Nick Brown
Edit Folder	Active	Low	Business Rule	Apr 19, 2021	John Smith
Clone Folder	Active	Medium	Business Rule	Apr 19, 2021	John Smith
Delete Folder	Active	Medium	Business Rule	Apr 19, 2021	John Smith
	Active	Medium	Business Rule	Apr 19, 2021	John Smith
	Active	Medium	Functional Requirement	Apr 19, 2021	John Smith
	Active	Medium	Business Rule	Apr 19, 2021	John Smith
	Active	Medium	Business Rule	Apr 12, 2021	John Smith
	Active	Medium	Business Rule	Apr 12, 2021	John Smith
	Active	High	Functional Requirement	Apr 19, 2021	John Smith
	Active	Medium	Business Rule	Apr 19, 2021	John Smith

On Requirements detail page users can see details about the particular record: status, type, version, priority and so on. Here users also can paste references

Using Requirement detail page users are able to perform such actions as:

- Delete
- Clone
- Edit
- 'Create new version' creation button
- 'Link to Test Cases' creation button
- change Assignee
- change workflow status from active to inactive (or other status according workflow).

The screenshot shows the detail page for the requirement 'APR7R-21 Web - .html, .htm ONLINE'. It includes a status dropdown (Active), buttons for 'Create new version' and 'Link to Test Cases', and sections for Highlights, Details, and Coverage.

Status	Active	Priority	High	Assignee	John Smith
Type	Functional Requirement	Source	Documentation	Version	2

Created Date/By	Apr 06, 2021 / John Smith	Last Modified Date/By	Apr 19, 2021 / Nick Brown
Description	System Admin is able to install the ViewTrac package from scratch; users, customers should be notified		
Notes	New version of app, see steps in guide		
Labels	Installation		

Actions	Name	Status	Priority	Assignee
Installation	Installation the ViewTrac package50	Active	Medium	John Smith
New TC	New TC	Active	Medium	Nick Brown

Users have an ability to create a new version of the current requirement record, using the 'Create new version' button. Users should fill in the required field 'New version creation reasons' and make other changes if it is needed. After saving the new version, results will be displayed on the requirement detail page on the Version history tab. By clicking on the tab users can see the current version and previous. Note: Users aren't able to delete the current version of a requirement, only previous. Here users can see some details of the requirement record.

Create new version

Installation X

Description

System Admin is able to install the ViewTrac package from scratch; users, customers should be notified

Notes

New version of app, see steps in guide

* New version creation reasons

Save

Cancel

Coverage	Version History	Chatter			
Actions	#	Name	Priority	Version created d...	Version creation reason
	2	Web - .html, .htm ONLINE	High	Apr 19, 2021	New updates due to PM comments
	1	Web - .html, .htm ONLINE	Medium	Apr 08, 2021	Initial requirement

Requirement

APR7R-21 Web - .html, .htm ONLINE

▽ Highlights

Status	Active	Priority	High	Assignee	John Smith
Type	Functional Requirement	Source	Documentation	Version	2

▽ Details

Created Date/By	Apr 08, 2021 / John Smith	Last Modified Date/By	Apr 19, 2021 / Nick Brown
Description	System Admin is able to install the ViewTrac package from scratch; users, customers should be notified		
Notes	New version of app, see steps in guide		
Labels	Installation		
Version creation reason	New updates due to PM comments		

Cancel

Users can change workflow status, using the 'Active to Inactive' button. After clicking the button, the detail page will be refreshed and Inactive Status will be shown. Users don't have a possibility to change Inactive workflow status to Active back (in default workflow).

TESTER Registration and Players ▾ Requirements Test Library Test Executions Traceability Matrix

New Folder New Requirement

Tree List Group Filters: Set Filters

1
Imported
2
APR7R-21 Web - .html, .htm ONLINE
APR7R-22 Upload from box.com

APR7R-21 Web - .html, .htm ONLINE

Status: Active ▾ Create new version Link to Test Cases

Deactivate
View workflow

Status	Active	Priority	High	Assignee	John Smith
Type	Functional Requirement	Source	Documentation	Version	2

Users are able to link requirements to test cases, using 'Link to Test Cases' button

TESTER Registration and Players ▾ Requirements Test Library Test Executions Traceability Matrix

New Folder New Requirement

Tree List Group Filters: Set Filters

1
Imported
2
APR7R-21 Web - .html, .htm ONLINE
APR7R-22 Upload from box.com

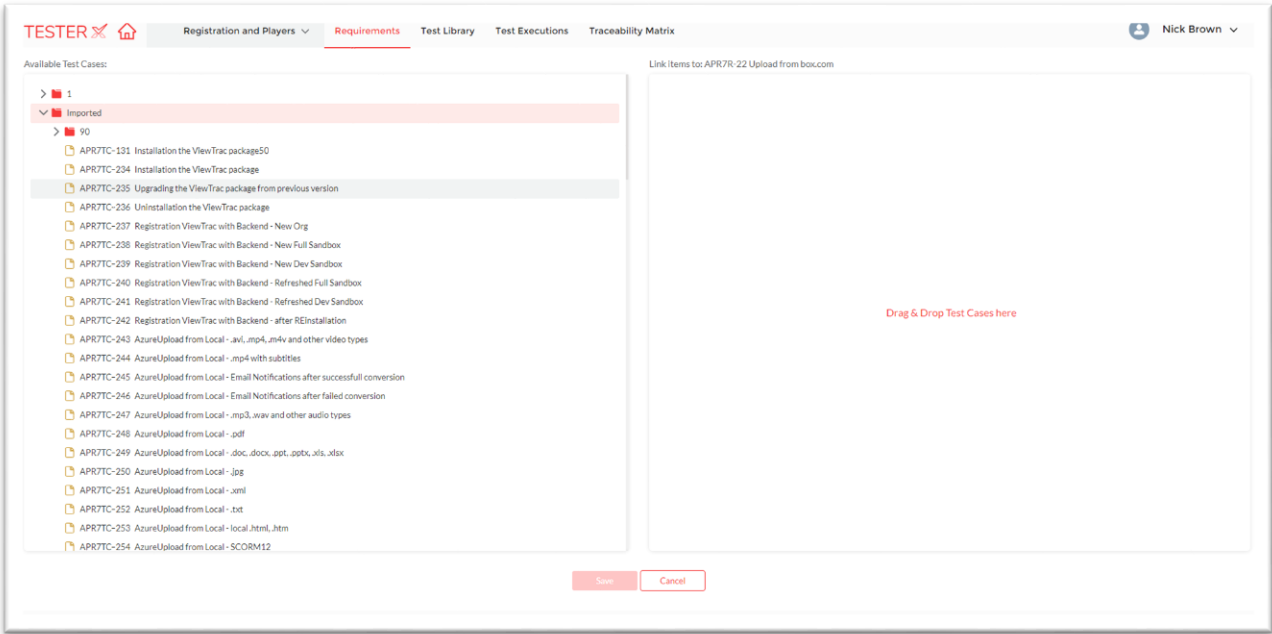
APR7R-21 Web - .html, .htm ONLINE

Status: Active ▾ Create new version Link to Test Cases

▽ Highlights

Status	Active	Priority	High	Assignee	John Smith
Type	Functional Requirement	Source	Documentation	Version	2

Clicking by 'Link to Test Cases' button users are able to choose test cases that they would like to link with the requirement, using the left column 'Available Test Cases'. Drag and drop the chosen test cases to the right column and click save.



The results of the linking requirements with test cases users can observe on the ‘Coverage’ tab.

Here users can delete the relationship between requirement and test cases, and open the test case’s detail page by clicking on the ‘arrow icon’ near the test case name. Also here users can find the details about related test cases.

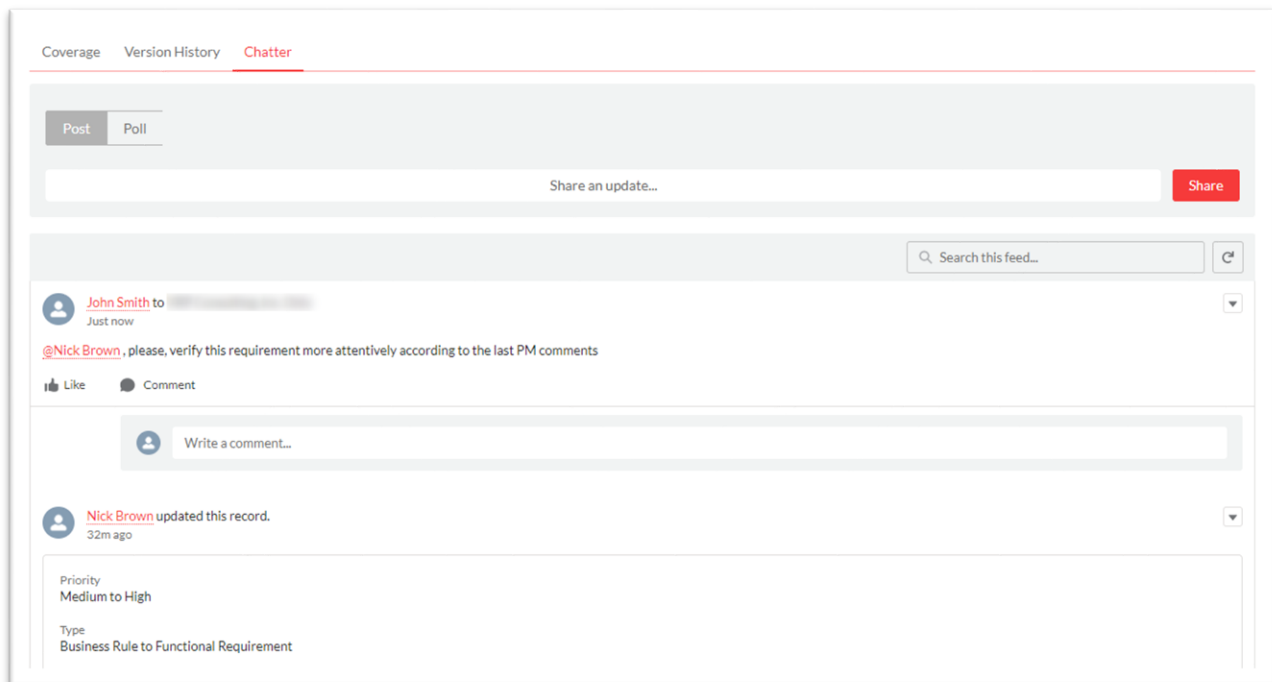
CoverageVersion HistoryChatter

Actions	Name	Status	Priority	Assignee
 	Installation the ViewTrac package50	Active	Medium	John Smith
 	New TC	Active	Medium	Nick Brown

Chatter tab allows users to track all changes which are related to a particular field of the record. All changes will be displayed on the Chatter tab.

Here users can create a post, a poll and ask a question and have a conversation with other users.





In order to close a requirement record, users should click on the cross button on the requirement detail page or double click on the particular record in the main list.

Test Library

Overview

Test Library tab is a storage for test cases, where users can create and manage them.

In order to perform all of Test Library tab actions, Non-admin users should have a specific role and permissions that define it.

Users are able to create Test cases and Folders for them, using main buttons 'New Test Case' and 'New Folder' at the top of the page.

Also users are able to use the main button 'Add to Executions' at the top of the page.

The button is used to add selected test-cases to execution.

TESTER

Registration and Players

Requirements

Test Library

Test Executions

Traceability Matrix

John Smith

New Folder

New Test Case

Add to Executions

Export

Import

Tree

List

Group

Filters: Set Filters

Search for Test Cases

	Actions	Status	Priority	Version	Last Modified Date	Assignee
1						
Imported						
APR7TC-234 Installation the ViewTrac package		Active	Medium	2	Apr 19, 2021	John Smith
APR7TC-235 Upgrading the ViewTrac package from previous version		Active	High	1	Apr 19, 2021	John Smith
APR7TC-236 Uninstallation the ViewTrac package		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-237 Registration ViewTrac with Backend - New Org		Active	High	1	Apr 19, 2021	John Smith
APR7TC-238 Registration ViewTrac with Backend - New Full Sandbox		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-239 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	2	Apr 19, 2021	Nick Brown
APR7TC-240 Registration ViewTrac with Backend - Refreshed Full Sandbox		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-241 Registration ViewTrac with Backend - Refreshed Dev Sandbox		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-242 Registration ViewTrac with Backend - after REInstallation		Active	Low	2	Apr 19, 2021	Nick Brown
APR7TC-243 AzureUpload from Local - avi, mp4, m4v and other video types		Active	High	1	Apr 19, 2021	John Smith
APR7TC-244 AzureUpload from Local - mp4 with subtitles		Active	High	1	Apr 19, 2021	John Smith
APR7TC-245 AzureUpload from Local - Email Notifications after successful conversion		Active	High	1	Apr 19, 2021	John Smith
APR7TC-246 AzureUpload from Local - Email Notifications after failed conversion		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-247 AzureUpload from Local - mp3, wav and other audio types		Active	High	1	Apr 19, 2021	John Smith
APR7TC-248 AzureUpload from Local - pdf		Active	High	1	Apr 19, 2021	John Smith
APR7TC-249 AzureUpload from Local - doc, docx, ppt, pptx, xls, xlsx		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-250 AzureUpload from Local - jpg		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-251 AzureUpload from Local - xml		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-252 AzureUpload from Local - txt		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-253 AzureUpload from Local - local_html, html		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-254 AzureUpload from Local - SCORM12		Active	High	1	Apr 19, 2021	John Smith
APR7TC-255 AzureUpload from Local - HSP		Active	High	1	Apr 19, 2021	John Smith
APR7TC-256 AzureUpload from Local - TinCan		Active	Medium	1	Apr 19, 2021	Nick Brown

Test cases can be displayed in three views:

- Tree
- List
- Group

TESTER

Registration and Players

Requirements

Test Library

Test Executions

Traceability Matrix

John Smith

New Folder

New Test Case

Add to Executions

Export

Import

Tree

List

Group

Filters: Set Filters

Search for Test Cases

	Actions	Status	Priority	Version	Last Modified Date	Assignee
1						
Imported						
APR7TC-234 Installation the ViewTrac package		Active	Medium	2	Apr 19, 2021	John Smith
APR7TC-235 Upgrading the ViewTrac package from previous version		Active	High	1	Apr 19, 2021	John Smith

Tree list view displays folders and records in it and records which are in the Root folder (main folder).

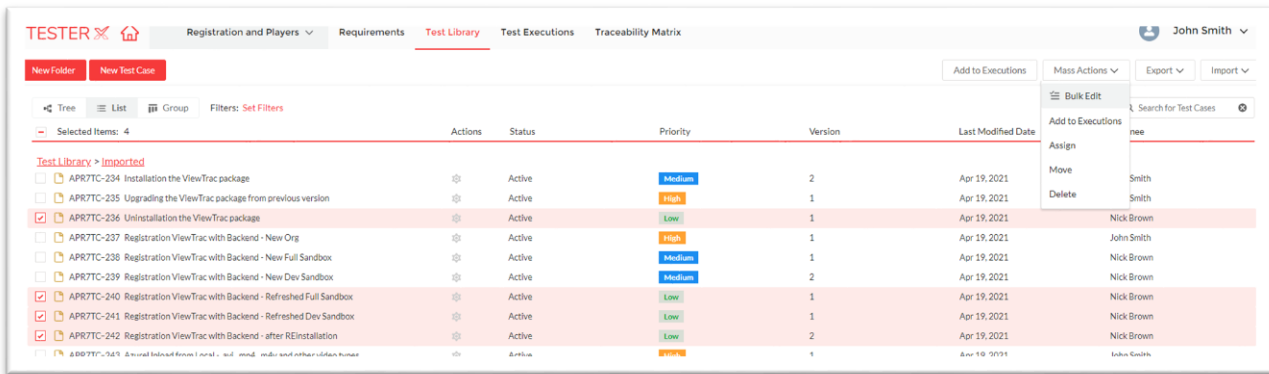


	Actions	Status	Priority	Version	Last Modified Date	Assignee
1 Imported						
APR7TC-234 Installation the ViewTrac package		Active	Medium	2	Apr 19, 2021	John Smith
APR7TC-235 Upgrading the ViewTrac package from previous version		Active	High	1	Apr 19, 2021	John Smith
APR7TC-236 Uninstallation the ViewTrac package		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-237 Registration ViewTrac with Backend - New Org		Active	High	1	Apr 19, 2021	John Smith
APR7TC-238 Registration ViewTrac with Backend - New Full Sandbox		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-239 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	2	Apr 19, 2021	Nick Brown
APR7TC-240 Registration ViewTrac with Backend - Refreshed Full Sandbox		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-241 Registration ViewTrac with Backend - Refreshed Dev Sandbox		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-242 Registration ViewTrac with Backend - after ReInstallation		Active	Low	2	Apr 19, 2021	Nick Brown
APR7TC-243 AzureUpload from Local - avi, mp4, m4v and other video types		Active	High	1	Apr 19, 2021	John Smith
APR7TC-244 AzureUpload from Local - mp4 with subtitles		Active	High	1	Apr 19, 2021	John Smith
APR7TC-245 AzureUpload from Local - Email Notifications after successful conversion		Active	High	1	Apr 19, 2021	John Smith
APR7TC-246 AzureUpload from Local - Email Notifications after failed conversion		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-247 AzureUpload from Local - mp3, wav and other audio types		Active	High	1	Apr 19, 2021	John Smith
APR7TC-248 AzureUpload from Local - pdf		Active	High	1	Apr 19, 2021	John Smith
APR7TC-249 AzureUpload from Local - doc, docx, ppt, pptx, xls, xlsx		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-250 AzureUpload from Local - jpg		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-251 AzureUpload from Local - xml		Active	Medium	1	Apr 19, 2021	Nick Brown

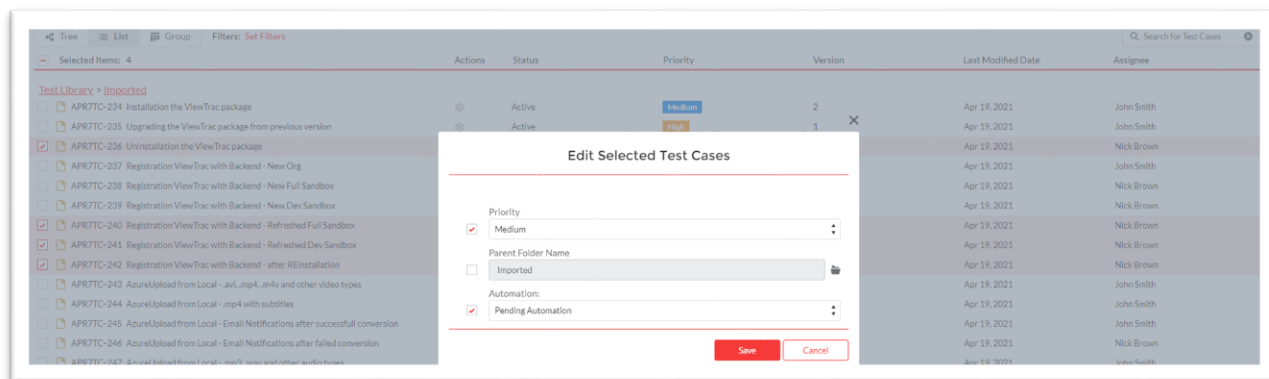
List View displays the same as Tree View and gives users an ability to work with one folder only and it allows users not to distract attention to other data.

	Actions	Status	Priority	Version	Last Modified Date	Assignee
Test Library > Imported						
APR7TC-234 Installation the ViewTrac package		Active	Medium	2	Apr 19, 2021	John Smith
APR7TC-235 Upgrading the ViewTrac package from previous version		Active	High	1	Apr 19, 2021	John Smith
APR7TC-236 Uninstallation the ViewTrac package		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-237 Registration ViewTrac with Backend - New Org		Active	High	1	Apr 19, 2021	John Smith
APR7TC-238 Registration ViewTrac with Backend - New Full Sandbox		Active	Medium	1	Apr 19, 2021	Nick Brown
APR7TC-239 Registration ViewTrac with Backend - New Dev Sandbox		Active	Medium	2	Apr 19, 2021	Nick Brown
APR7TC-240 Registration ViewTrac with Backend - Refreshed Full Sandbox		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-241 Registration ViewTrac with Backend - Refreshed Dev Sandbox		Active	Low	1	Apr 19, 2021	Nick Brown
APR7TC-242 Registration ViewTrac with Backend - after ReInstallation		Active	Low	2	Apr 19, 2021	Nick Brown
APR7TC-243 AzureUpload from Local - avi, mp4, m4v and other video types		Active	High	1	Apr 19, 2021	John Smith
APR7TC-244 AzureUpload from Local - mp4 with subtitles		Active	High	1	Apr 19, 2021	John Smith
APR7TC-245 AzureUpload from Local - Email Notifications after successful conversion		Active	High	1	Apr 19, 2021	John Smith
APR7TC-246 AzureUpload from Local - Email Notifications after failed conversion		Active	Medium	1	Apr 19, 2021	Nick Brown

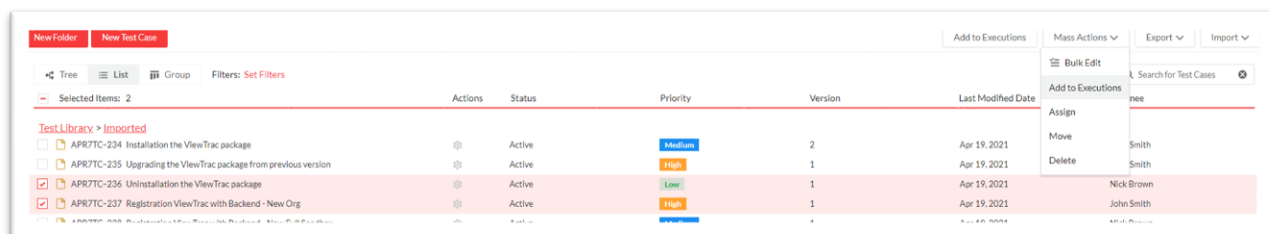
Also List view gives users a possibility to use 'Mass Action' Button only for record. The functionality isn't available for folders.



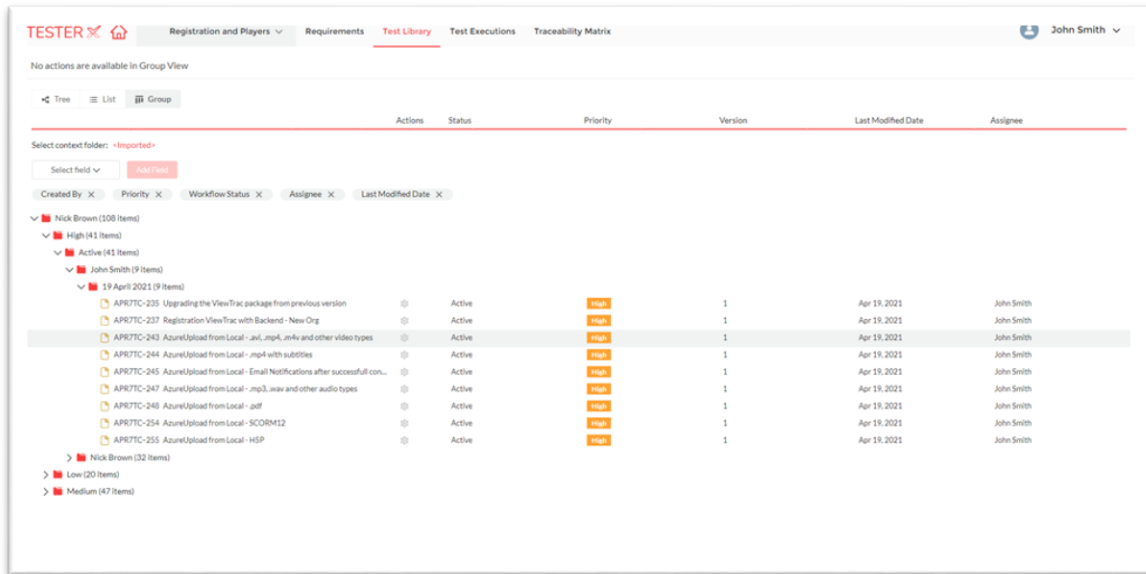
Clicking by List view users are able to check necessary records for Mass Update. After checking records, click 'Mass Action', choose 'Bulk edit'. Select a field or several fields for checked records and make changes of field's value. Save changes. 'Bulk edit' allows users to make the same changes for several records at the same time.



In comparison with Requirement Tab on Test Cases Tab 'Mass Action' button is used not only for 'Bulk Update'. Users are able to use 'Mass Actions' to add selected records to Executions. Click List View, select records that need and choose 'Add to Executions' from 'Mass Action', choose the folder and click save.



Group View allows users to group records by fields, using a particular folder. Select the context folder and add fields for grouping (max 5). Confirm the results.

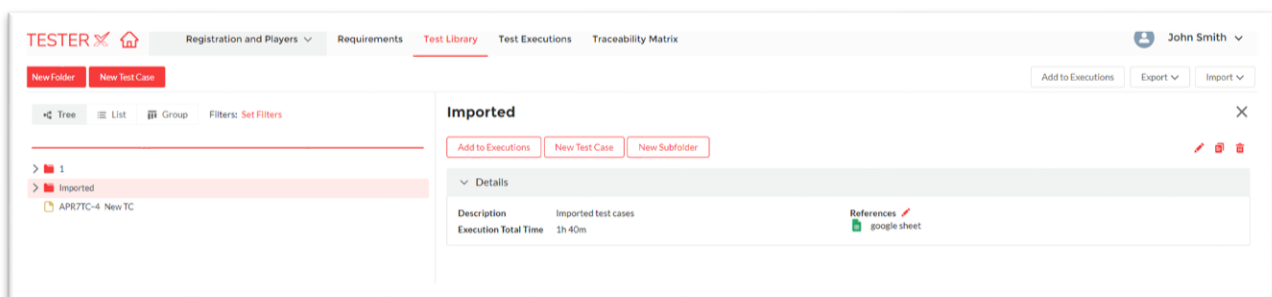


Folder's and Test Case's detail page is open by double clicking on it.

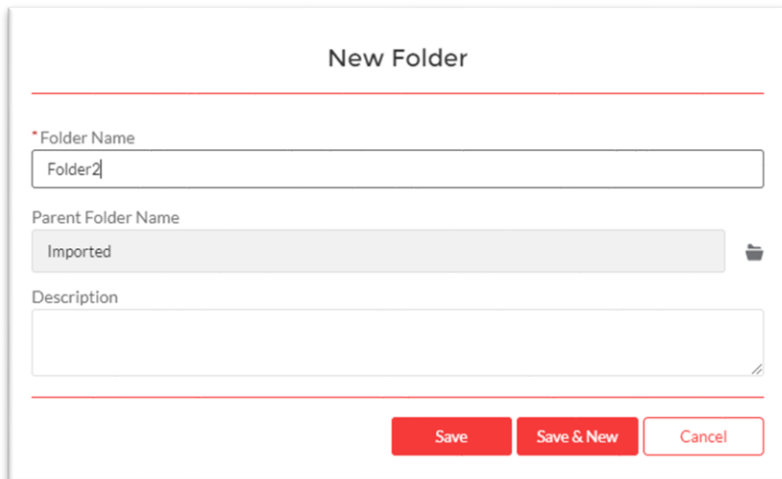
Users are able to create a new test case, using the main button 'New Test Case' at the top of the page and the button also is on the folder's detail page.

Folder's detail page contains the following information:

- folder's description
- ability to paste references
- delete
- clone
- edit
- 'New Subfolder' creation button
- 'New Test Case' creation button
- 'Add to Executions' button



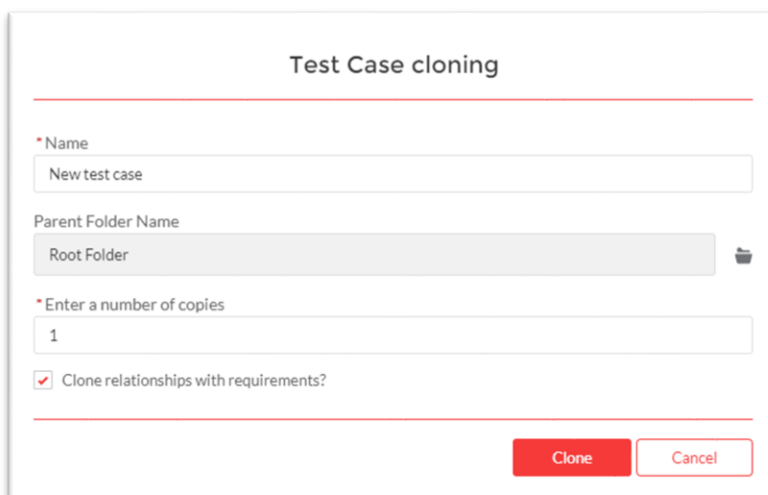
Users can create a subfolder on the folder detail page, in order to build folder's hierarchies.



A dialog box titled "New Folder" with a red header bar. It contains three input fields: "Folder Name" with the text "Folder2", "Parent Folder Name" with a dropdown menu showing "Imported" and a folder icon, and "Description" which is empty. At the bottom, there are three buttons: "Save", "Save & New", and "Cancel".

While cloning a test case record, users can specify the number of copied records (max 99).

'Clone relationships with requirements' checkbox allows users to preserve all relationships between requirements and test cases in cloned record.



A dialog box titled "Test Case cloning" with a red header bar. It contains four input fields: "Name" with the text "New test case", "Parent Folder Name" with a dropdown menu showing "Root Folder" and a folder icon, "Enter a number of copies" with the text "1", and a checkbox labeled "Clone relationships with requirements?" which is checked. At the bottom, there are two buttons: "Clone" and "Cancel".

Users are able to clone test case folder in several ways:

- ▢ Clone folder with its records only
- ▢ Clone folder with its records and records from subfolders without preserving folder's hierarchy
- ▢ Clone folder with its records and records from subfolders with preserving folder's hierarchy;

Folder cloning

* Name

Parent Folder Name


☒ Clone items from the current folder only
☐ Clone items from the current folder and all subfolders
☐ Preserve folder hierarchy inside selected folders

CloneCancel

While cloning records and folders users are able to choose the parent folder.

Select Folder

Child folders for that folder are not shown on the list

 Root Folder

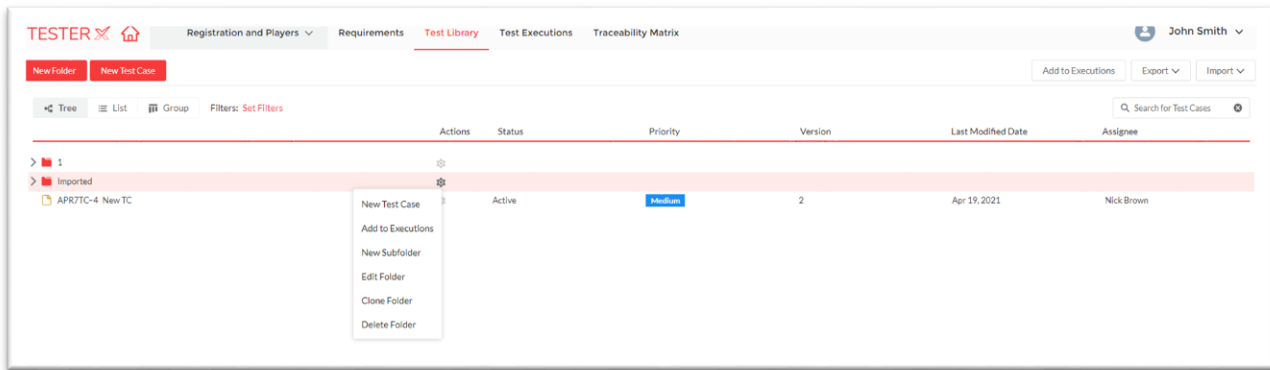
>  1

 Imported

Save

New SubfolderCancel

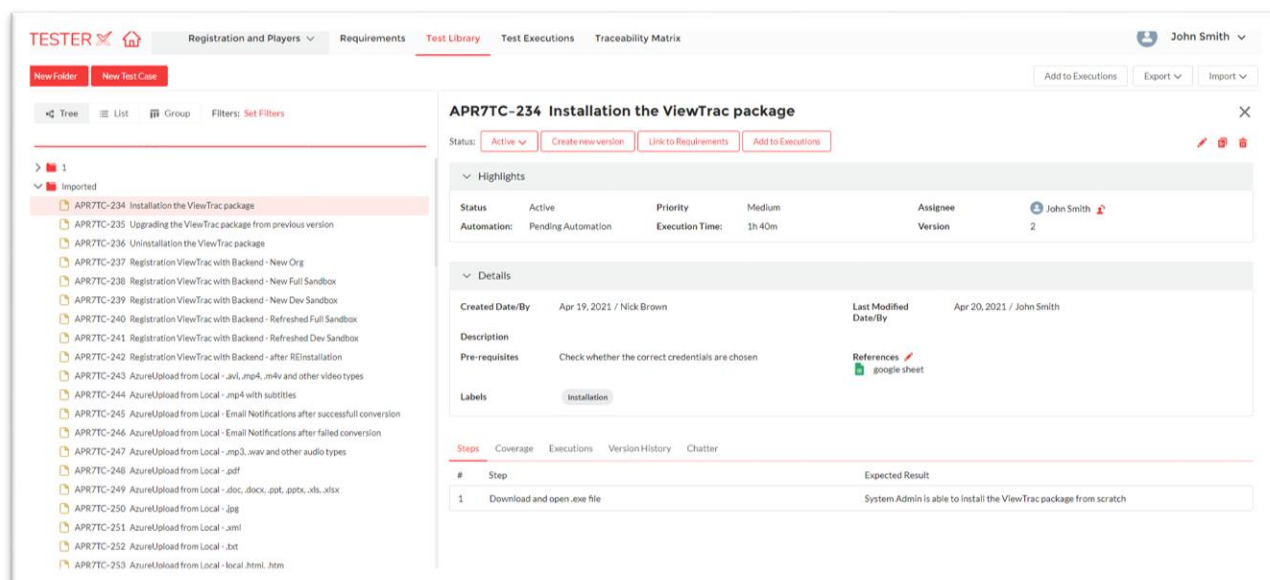
To perform all actions from the folder's detail page, users can use the gear menu as well.



On the Test Case detail page users can see details about the particular record: status, version, priority, execution time and so on. Here users also can paste references.

Using Test case detail page users are able to perform such actions as:

- delete
- clone
- edit
- create new version
- link to Requirements
- Add to Executions
- change workflow status from active to inactive (or other status according workflow)
- change Assignee



Users have an ability to create a new version of the current test case record, using the 'Create new version' button. Users should fill in the required field 'New version creation reasons' and make other changes if it is needed. After saving the new version, results will be displayed on the test case detail page on the Version history tab. By clicking on the tab users can see the current version and previous. Note: Users aren't able to delete the current version of a test case, only previous. Here users can see some details of the test case record.

Steps	Coverage	Executions	Version History	Chatter
Actions	#	Name	Priority	Version created d... Version creation reason
	2	Installation the ViewTrac package	Medium	Apr 19, 2021 New updates after fix
	1	Installation the ViewTrac package	High	Apr 19, 2021 Initial test case

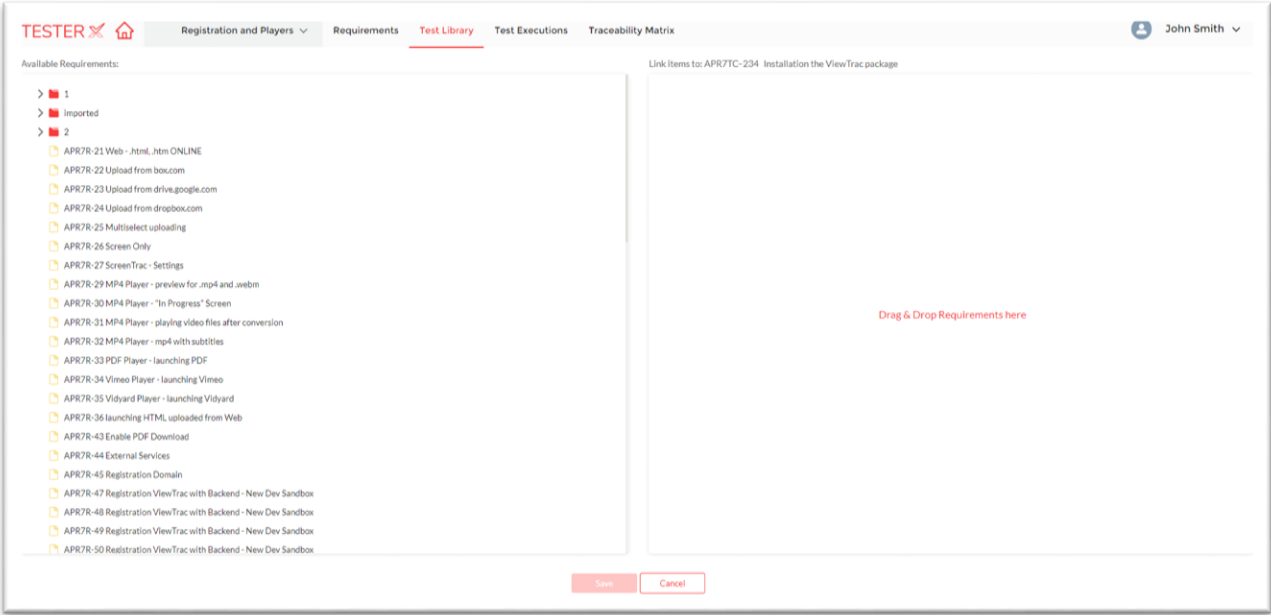
Users can change workflow status, using the 'Active to Inactive' button. After clicking the button, the detail page will be refreshed and Inactive Status will be shown. Users don't have a possibility to change Inactive workflow status to Active back (in default workflow).

APR7TC-234 Installation the ViewTrac package		Status: Active		Create new version		Link to Requirements		Add to Executions	
Deactivate		View workflow							
Status	Active	Priority	Medium	Assignee	John Smith				
Automation	Pending Automation	Execution Time	1h 40m	Version	2				

Users are able to link the test case to requirement, using the 'Link to Requirements' button.

APR7TC-234 Installation the ViewTrac package		Status: Active		Create new version		Link to Requirements		Add to Executions	
Highlights									
Status	Active	Priority	Medium	Assignee	John Smith				
Automation	Pending Automation	Execution Time	1h 40m	Version	2				

Clicking by 'Link to Requirements' button users are able to choose requirements that they would like to link with the test case, using the left column 'Available Requirements'. Drag and drop the chosen requirements to the right column and click save.



The results of the linking test cases with requirements users can observe on the 'Coverage' tab.

Here users can delete the relationship between test cases and requirements, and open the requirement's detail page by clicking on the 'arrow icon' near the requirement name. Also here users can find the details about related requirements.

Steps	Coverage	Executions	Version History	Chatter
Actions	Name	Priority	Source	Assignee
 	Installation the ViewTrac package4	Low	Documentation	John Smith
 	Registration ViewTrac with Backend - New Full Sandbox	Medium	Documentation	John Smith

Chatter tab allows users to track all changes which are related to a particular field of the record. All changes will be displayed on the Chatter tab.

Here users can create a post, a poll and ask a question and have a conversation with other users.



Steps

Coverage

Executions

Version History

Chatter

Post

Poll

Share an update...

Share

Search this feed...

Nick Brown

Just now

@John Smith, please, update steps in this test case

Like

Comment

Write a comment...

This record was updated.
22h ago

Pre-requisites
Changed

Execution Time
120 to 100

Show All Updates

Executions tab allows users to see executed test cases records and it's detail information such as last executed by, execution date, status, assignee.

Steps Coverage Executions Version History Chatter

Actions	Test Cycle	Status	Assignee	Execution Date	Last Executed By
	Test Cycle 1	In Progress	John Smith	Apr 20, 2021	John Smith

Steps Tab displays test case steps and it's expected result.

Steps

Coverage

Executions

Version History

Chatter

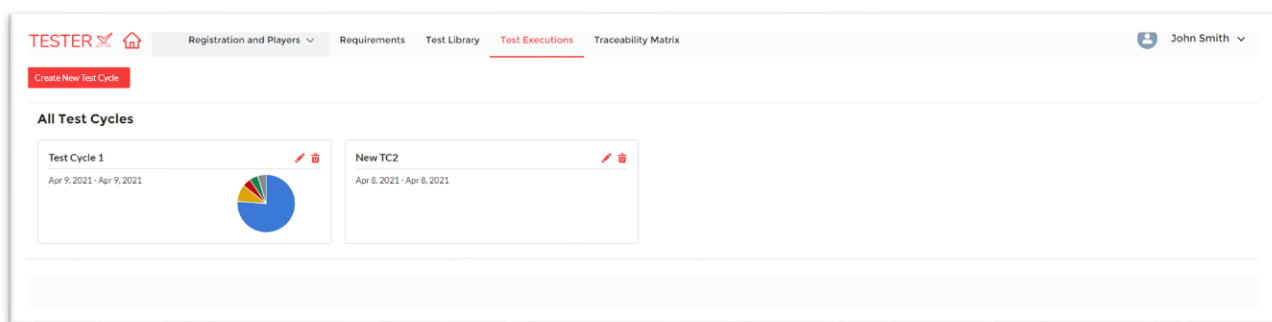
#	Step	Expected Result
1	Download and open .exe file	System Admin is able to install the ViewTrac package from scratch

In order to close a test case record, users should click on the cross button on the test case detail page or double click on the particular record in the main list.

Test Executions

Overview

Test Executions Tab allows users to store in Test Cycles test cases which should be executed. Every test cycle contains only executions that were added to it. Users can't add test cases to executions if there is no any test cycle created.



Here on the page users can see all created test cycles. They can be edited and deleted. Also a diagram with execution statuses statistics on every test cycle is displayed.

'Create New Test Cycle' button at the bottom of the page allows to create new test cycle. Note: all fields in the modal window are required.

On test executions records users can find all necessary information: test case steps, status, actual and expected results and manage all test executions.

In order to perform all of Test Execution tab actions, Non-admin users should have a specific role and permissions that define it.

Users are able to create Folders for test executions, using the main button 'New Folder' at the top of the page. Also users are able to use the main button 'Add to Executions' at the top of the page in order to add test cases to executions.

The button is used to add selected test-cases to execution.

	Actions	Execution Status	Assignee	Last Modified Date
New folder				
APR7E-126 Installation the ViewTrac package		In Progress	John Smith	Apr 20, 2021
APR7E-127 Upgrading the ViewTrac package from previous version		To Test	John Smith	Apr 20, 2021
APR7E-128 Uninstallation the ViewTrac package		To Test	John Smith	Apr 20, 2021
APR7E-129 Registration ViewTrac with Backend - New Org		To Test	Nick Brown	Apr 20, 2021
APR7E-130 Registration ViewTrac with Backend - New Full Sandbox		To Test	Nick Brown	Apr 20, 2021
APR7E-131 Registration ViewTrac with Backend - New Dev Sandbox		To Test	John Smith	Apr 20, 2021
APR7E-132 Registration ViewTrac with Backend - Refreshed Full Sandbox		In Progress	John Smith	Apr 20, 2021
APR7E-133 Registration ViewTrac with Backend - Refreshed Dev Sandbox		To Test	Nick Brown	Apr 20, 2021
APR7E-134 Registration ViewTrac with Backend - after ReInstallation		To Test	Nick Brown	Apr 20, 2021
APR7E-135 AzureUpload from Local - avi, mp4, m4v and other video types		To Test	John Smith	Apr 20, 2021
APR7E-136 AzureUpload from Local - mp4 with subtitles		To Test	John Smith	Apr 20, 2021
APR7E-137 AzureUpload from Local - Email Notifications after successful conversion		Passed	Nick Brown	Apr 20, 2021
APR7E-138 AzureUpload from Local - Email Notifications after failed conversion		To Test	Nick Brown	Apr 20, 2021
APR7E-139 AzureUpload from Local - mp3, wav and other audio types		Blocked	John Smith	Apr 20, 2021
APR7E-140 AzureUpload from Local - pdf		To Test	John Smith	Apr 20, 2021
APR7E-141 AzureUpload from Local - doc, docx, ppt, pptx, xls, xlsx		Failed	John Smith	Apr 20, 2021
APR7E-142 AzureUpload from Local - jpg		To Test	Nick Brown	Apr 20, 2021
APR7E-143 AzureUpload from Local - xml		To Test	Nick Brown	Apr 20, 2021
APR7E-144 AzureUpload from Local - txt		To Test	Nick Brown	Apr 20, 2021

Test executions can be displayed in three views:

- Tree
- List
- Group
- Dashboard

	Actions	Execution Status	Assignee	Last Modified Date
APR7E-126 Installation the ViewTrac package		In Progress	John Smith	Apr 20, 2021
APR7E-127 Upgrading the ViewTrac package from previous version		To Test	John Smith	Apr 20, 2021
APR7E-128 Uninstallation the ViewTrac package		To Test	John Smith	Apr 20, 2021

Tree list view displays folders and records in folders and records which are in the Root folder (main folder).

Test Cycle 1

Dashboard Tree List Group Filters: Set Filters Search for Executions

	Actions	Execution Status	Assignee	Last Modified Date
New folder				
APR7E-146 AzureUpload from Local - SCORM12		To Test	John Smith	Apr 20, 2021
APR7E-145 AzureUpload from Local - local.html.htm		To Test	John Smith	Apr 20, 2021
APR7E-126 Installation the ViewTrac package		In Progress	John Smith	Apr 20, 2021
APR7E-127 Upgrading the ViewTrac package from previous version		To Test	John Smith	Apr 20, 2021

List View on Test Executions displays the same as Tree View and gives users an ability to work with one folder only and it allows users not to distract attention to other data.

Test Cycle 1

Dashboard Tree List Group Filters: Set Filters Search for Executions

	Actions	Execution Status	Assignee	Last Modified Date
Test Cycle 1 > New folder				
APR7E-146 AzureUpload from Local - SCORM12		To Test	John Smith	Apr 20, 2021
APR7E-145 AzureUpload from Local - local.html.htm		To Test	John Smith	Apr 20, 2021

Group View allows users to group records by fields, using a particular folder. Select the context folder and add fields for grouping (max 5). Confirm the results.

TESTER Registration and Players Requirements Test Library Test Executions Traceability Matrix John Smith

All Test Cycles No actions are available in Group View

Test Cycle 1

Dashboard Tree List Group

Select context folder: <Test Cycle 1>

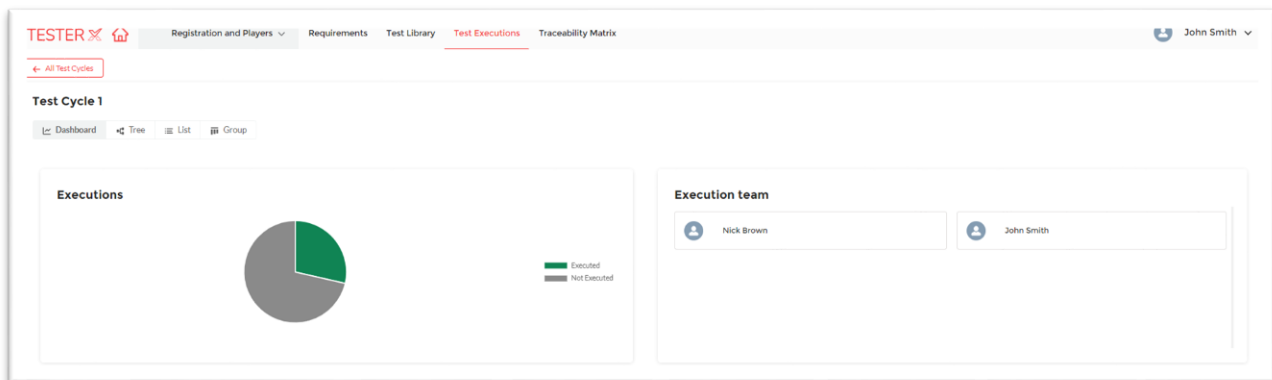
Select field Add Field

Created Date x Assignee x Execution Status x Created By x Last Modified By x

20 April 2021 (21 items)				
John Smith (12 items)				
Blocked (1 item)				
Failed (1 item)				
In Progress (2 items)				
To Test (8 items)				
John Smith (8 items)				
John Smith (6 items)				
APR7E-127 Upgrading the ViewTrac package from previous version		To Test	John Smith	Apr 20, 2021
APR7E-128 Uninstallation the ViewTrac package		To Test	John Smith	Apr 20, 2021
APR7E-135 AzureUpload from Local - avi, mp4, m4v and other video types		To Test	John Smith	Apr 20, 2021
APR7E-140 AzureUpload from Local - pdf		To Test	John Smith	Apr 20, 2021
APR7E-145 AzureUpload from Local - local.html.htm		To Test	John Smith	Apr 20, 2021
APR7E-146 AzureUpload from Local - SCORM12		To Test	John Smith	Apr 20, 2021
Nick Brown (2 items)				
Nick Brown (9 items)				

Dashboard view allows users to see diagrams:

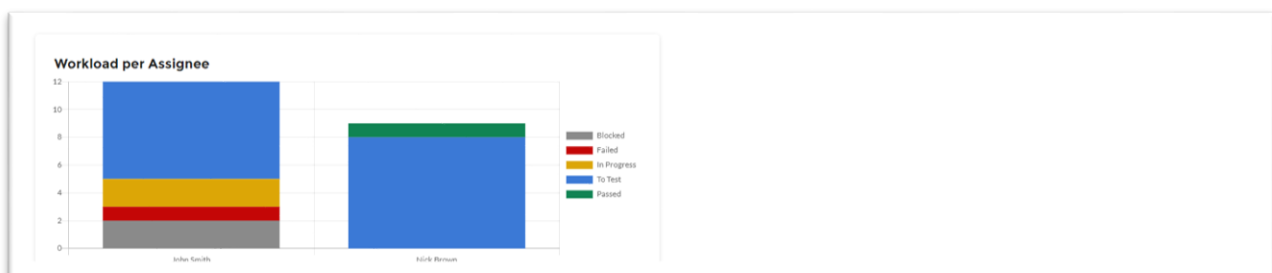
- Executions - displays number of executed and not executed executions
- Execution team - displays all assigned users on the project



- Activity report for past 14 days - displays the whole number of executions with statuses by days ('Execute' button performed) Note: it counts all executions (not continue execution) when one execution record can be executed more than once.



- Workload per Assignee - displays number of executions with statuses by each assignee (reflects identically the data from test cycle)

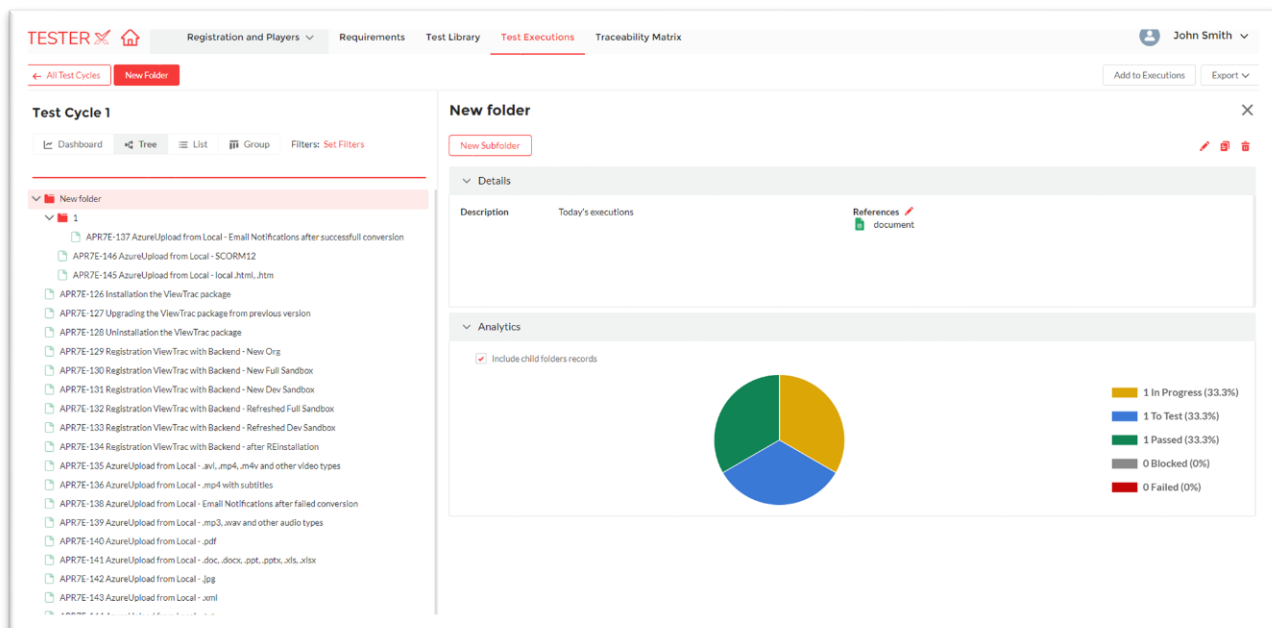


Folder's and Test Executions detail page is open by double clicking on it.

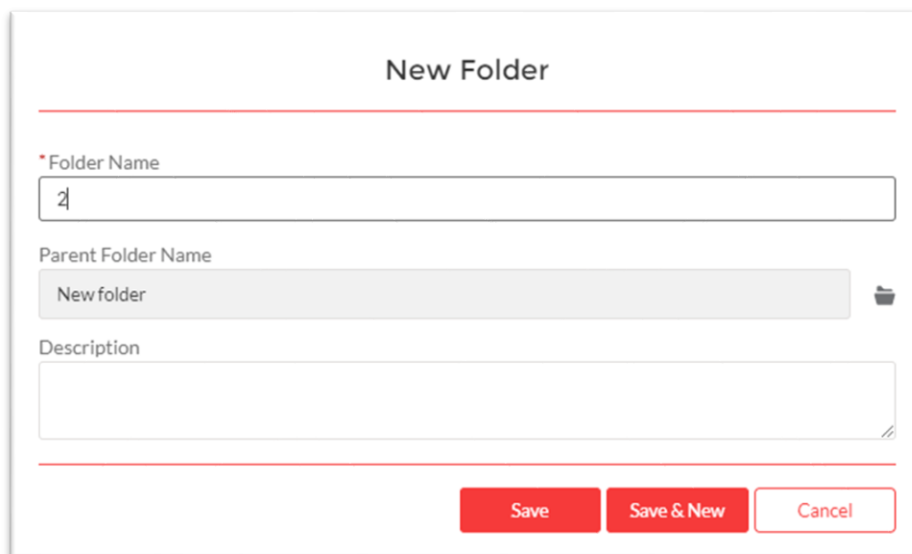
Test Executions Folder's detail page contains the following information:

- folder's description
- ability to paste references
- delete
- clone/edit
- 'New Subfolder' creation button
- Analytics

Analytics diagram on the execution folder's detail page allows users to be aware of the quantity of test executions records with different statuses. 'Include child folders records' checkbox allows diagram to display child folders records as well, to show users all data.

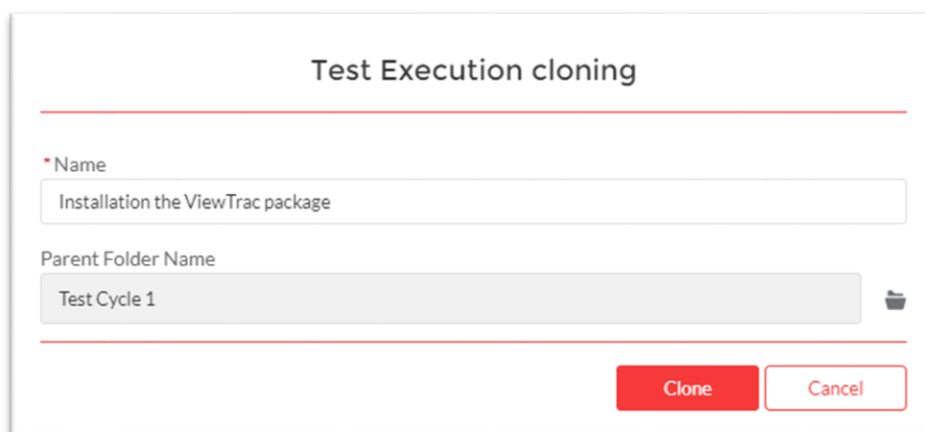


Users can create a subfolder on the folder detail page, in order to build folder's hierarchies.



A dialog box titled "New Folder" with a red header bar. It contains three input fields: "Folder Name" with a red asterisk and a text input containing "2"; "Parent Folder Name" with a dropdown menu showing "New folder" and a folder icon; and "Description" with a text area. At the bottom are three red buttons: "Save", "Save & New", and "Cancel".

While cloning a test executions record, users can choose the parent folder.



A dialog box titled "Test Execution cloning" with a red header bar. It contains two input fields: "Name" with a red asterisk and a text input containing "Installation the ViewTrac package"; and "Parent Folder Name" with a dropdown menu showing "Test Cycle 1" and a folder icon. At the bottom are two red buttons: "Clone" and "Cancel".

Users are able to clone test execution folder in several ways:

- Clone folder with its records only
- Clone folder with its records and records from subfolders without preserving folder's hierarchy
- Clone folder with its records and records from subfolders with preserving folder's hierarchy

Folder cloning

Name

Parent Folder Name

☒ Clone items from the current folder only
☐ Clone items from the current folder and all subfolders
☐ Preserve folder hierarchy inside selected folders

Clone
Cancel

While cloning folders users are able to choose the parent folder as well.

To perform all actions from the folder's detail page, users can use the gear menu as well.

TESTER Registration and Players Requirements Test Library **Test Executions** Traceability Matrix Nick Brown

← All Test Cycles New Folder Add to Executions Export

Test Cycle 1

Dashboard Tree List Group Filters: Set Filters Search for Executions

	Actions	Execution Status	Assignee	Last Modified Date
- New folder - APR7E-126 Installation the ViewTrac package - APR7E-127 Upgrading the ViewTrac package from previous version - APR7E-128 Uninstallation the ViewTrac package - APR7E-129 Registration ViewTrac with Backend - New Org - APR7E-130 Registration ViewTrac with Backend - New Full Sandbox - APR7E-131 Registration ViewTrac with Backend - New Dev Sandbox - APR7E-132 Registration ViewTrac with Backend - Refreshed Full Sandbox - APR7E-133 Registration ViewTrac with Backend - Refreshed Dev Sandbox	- New Subfolder - Edit Folder - Clone Folder - Delete Folder	- In Progress - To Test - To Test - To Test - To Test - To Test - In Progress - To Test - To Test	- John Smith - John Smith - John Smith - Nick Brown - Nick Brown - John Smith - John Smith - Nick Brown - Nick Brown	- Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021 - Apr 20, 2021

On the Test Executions detail page users can see details about the particular record: status, assignee, numbers of executions and so on.

Using Test Executions detail page users are able to perform such actions as:

- Delete
- Clone
- Execute
- continue execution
- change Assignee

Test Cycle 1

Dashboard Tree List Group Filters: Set Filters

- New folder
- APR7E-126 Installation the ViewTrac package
- APR7E-127 Upgrading the ViewTrac package from previous version
- APR7E-128 Uninstallation the ViewTrac package
- APR7E-129 Registration ViewTrac with Backend - New Org
- APR7E-130 Registration ViewTrac with Backend - New Full Sandbox
- APR7E-131 Registration ViewTrac with Backend - New Dev Sandbox
- APR7E-132 Registration ViewTrac with Backend - Refreshed Full Sandbox
- APR7E-133 Registration ViewTrac with Backend - Refreshed Dev Sandbox
- APR7E-134 Registration ViewTrac with Backend - after REInstallation
- APR7E-135 AzureUpload from Local - avi, mp4, m4v and other video types
- APR7E-136 AzureUpload from Local - mp4 with subtitles
- APR7E-138 AzureUpload from Local - Email Notifications after failed conversion
- APR7E-139 AzureUpload from Local - mp3, wav and other audio types

APR7E-126 Installation the ViewTrac package

Execute Continue Execution

Highlights

Status: In Progress Last Executed Date / By: Apr 20, 2021 / John Smith Original Test Case: APR7TC-234
Assignee: John Smith Number of Executions: 1 Original Test Case Version: 2

Details

Description: Pre-requisites: Check whether the correct credentials are chosen References: google sheet

Steps Execution History Chatter

#	Step	Expected Result	Actual Result	Status
1	Download and open .exe file	System Admin is able to install the ViewTrac package from scratch		In Progress

'Execute' button allows users to define Actual result of the test executions and define its status. Users are able to define status for the certain step or for Test Execution in general.

APR7E-126 Installation the ViewTrac package

Description: Pre-requisites: Check whether the correct credentials are chosen

Execution Status: To Test

Test Steps

#	Step	Expected Result	Actual Result	Status
1	Download and open .exe file	System Admin is able to install the ViewTrac package from scratch		In Progress

Save Cancel

'Continue Execution' button allows users to change the actual result of test execution and both statuses if it is needed.

APR7E-126 Installation the ViewTrac package

Description: Pre-requisites: Check whether the correct credentials are chosen

Execution Status: Blocked

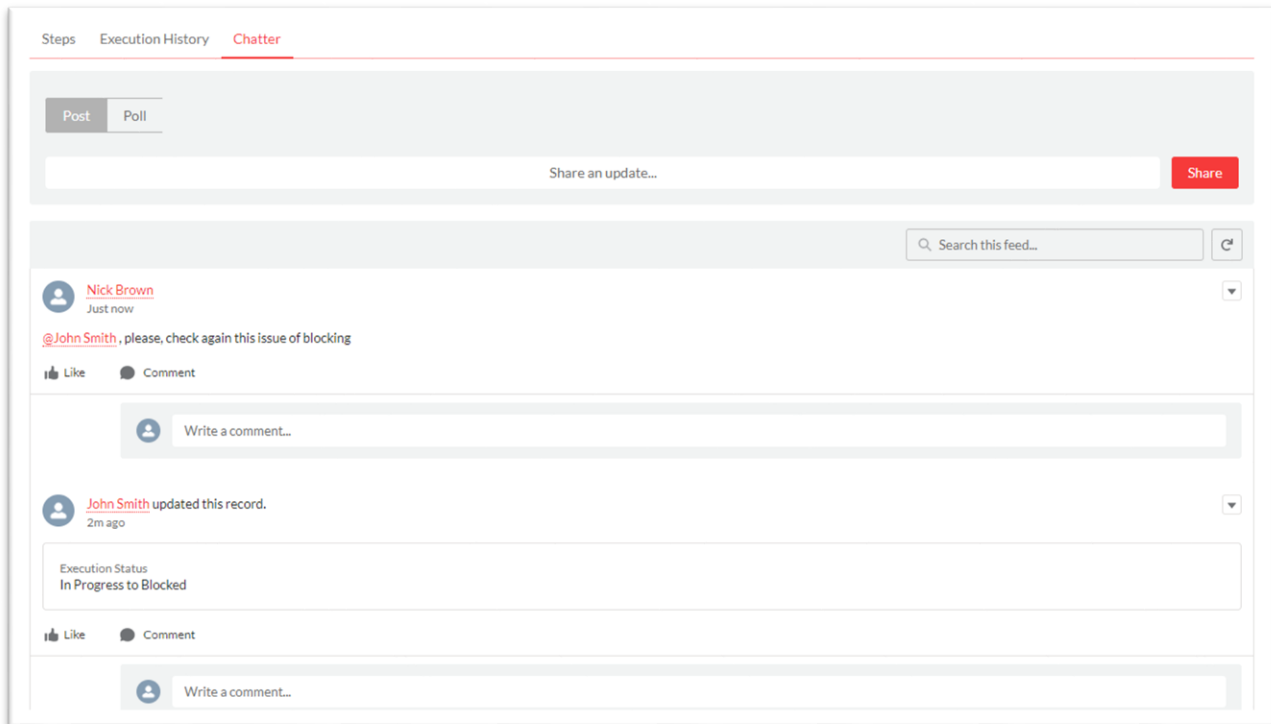
Test Steps

#	Step	Expected Result	Actual Result	Status
1	Download and open .exe file	System Admin is able to install the ViewTrac package from scratch	Installation can't be performed	Blocked

Save Cancel

Chatter tab allows users to track all changes which are related to a particular field of the record. All changes will be displayed on the Chatter tab.

Here users can create a post, a poll and ask a question and have a conversation with other users.



Execution History tab allows users to see executed test cases records and its results

Every time when users click the 'execute' button, the new execution version is created. By clicking on the Execution History tab users can see the current version and previous. Note: Users aren't able to delete the current version of a test execution, only previous.

The screenshot shows the 'Execution History' tab interface. At the top, there are tabs for 'Steps', 'Execution History', and 'Chatter'. Below the tabs is a table with the following columns: 'Actions', 'Name', 'Status', and 'Executed By'. The table contains two rows of data.

Actions	Name	Status	Executed By
	TE-0000846	Blocked	John Smith
	TE-0000840	In Progress	John Smith

Steps Tab displays test case steps and their status, expected and actual results.

Steps Execution History Chatter				
#	Step	Expected Result	Actual Result	Status
1	Download and open .exe file	System Admin is able to install the ViewTrac package from scratch	Installation can't be performed	Blocked

In order to close a test case record users should click on the cross button on the test case detail page or double click on the particular record in the main list.

Traceability Matrix

Overview

Traceability Matrix is a two-dimensional table which shows the correspondence between the functional requirements of the product and the prepared test cases. The table column headers contain requirements, and the row headers contain test cases. At the intersection - a mark that means that the current column's requirement is covered by the test cases of the current row.

The purpose of the Traceability Matrix is to find out:

- which requirements are "covered" by the tests and which are not
- redundancy of test cases (one functional requirement is covered by a large number of test cases)

Creating New Relationships

In order to create a new relationship between requirement and test cases, click at the intersection at the matrix. Confirm the action on the dialog window by clicking 'yes'.

Do you really want to relate next records?

Test Case: APR7TC-241 Registration ViewTrac with Backend - Refreshed Dev Sandbox
Requirement: APR7R-52 R-32 Registration ViewTrac with Backend - New Dev Sandbox

Deleting Existing Relationships

In order to delete a relationship between requirement and test cases, click on the cross at the intersection at the matrix and confirm the action on the dialog window by clicking 'yes'.

Do you really want to delete next records relationship?

Test Case: APR7TC-239 Registration ViewTrac with Backend - New Dev Sandbox
Requirement: APR7R-55 R-35 Registration ViewTrac with Backend - New Dev Sandbox

Users are able to open requirements and test case's detail page by clicking at their name at the matrix.

TESTER 

Registration and Players ▼ Requirements Test Library Test Executions Traceability Matrix

Results are limited to 50 requirements/test cases
 Total number of test cases not covering requirements: 39
 Total number of not covered requirements: 37

Test Cases Filters: [Set Filters](#)
 Requirements Filters: [Set Filters](#)

	REQUIREMENTS	APR7R-18	APR7R-21	APR7R-22	APR7R-23	APR7R-24	APR7R-25	APR7R-26	APR7R-27	APR7R-29	APR7R-30	APR7R-31	APR7R-32	APR7R-33	APR7R-34	APR7R-35	APR7R-36	APR7R-43	APR7R-44	APR7R-45	APR7R-47	APR7R-48
TEST CASES	COVERAGE	0	3	0	0	0	1	0	1	0	0	1	0	1	0	0	2	0	0	0	0	0
APR7TC-235	1													X								
APR7TC-236	1																					
APR7TC-237	1							X														
APR7TC-238	3																					

Filters

Users are able to use filters on the following tabs: Requirements, Test Library, Test Executions and Traceability Matrix. 'Set Filter' functionality allows users to filter records, according to their requests.

TESTER 

Registration and Players ▼ Requirements Test Library Test Executions Traceability Matrix

[New Folder](#) [New Requirement](#) Export Import

Tree List Group Filters: [Set Filters](#) Q Search for Requirements

	Actions	Status	Priority	Type	Last Modified Date	Assignee
> 1						
> Imported						
> 2						
APR7R-21 Web - .html, .htm ONLINE		Active	High	Functional Requirement	Apr 19, 2021	John Smith
APR7R-22 Upload from box.com		Active	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-23 Upload from drive.google.com		Active	Critical	Limitation	Apr 19, 2021	Nick Brown
APR7R-24 Upload from dropbox.com		Skipped	Medium	Business Rule	Apr 19, 2021	John Smith
APR7R-25 Upload from dropbox.com		Active	Medium	Business Rule	Apr 19, 2021	John Smith

Users select field, operator and value on 'Add a filter' form and choose the condition (AND, OR or customize the logic). Users are able to apply filter at once or save it and apply after saving.

Add a filter

Field: 1 Select an Option ▼ Operator: Select an Opt ▼ Value: Select an Option ▼ X

+ Add row Save filter Get filter

* Conditions

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

Apply Cancel

Saved filters are shown on the project's detail page and home page as well.

Users have an ability to add additional rows to filter in order to create complicated filter logic.

'Get filter' functionality gives an opportunity to choose one of the saved filters and apply it.

Also users are able to edit and delete filters, using 'Get filter'.

Choose any filter

Inactive reqs1 ✎ 🗑

Apply Cancel

Search

Search is used on the following tabs: Requirements, Test Library and Test Executions. Using search line users can find the record on a particular tab. Set several letters of the record name to the search line, click enter and confirm results.

Also search is used on Global Configuration page on following tabs:

- Users
- Roles
- Workflows

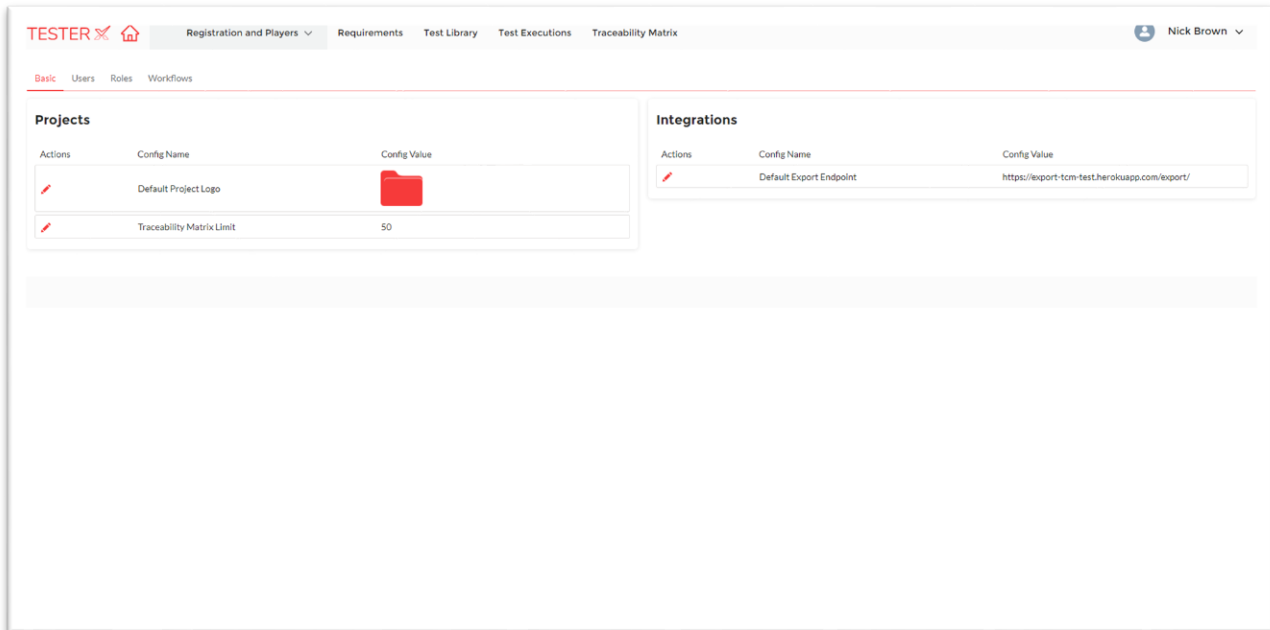
Global Configuration

Overview

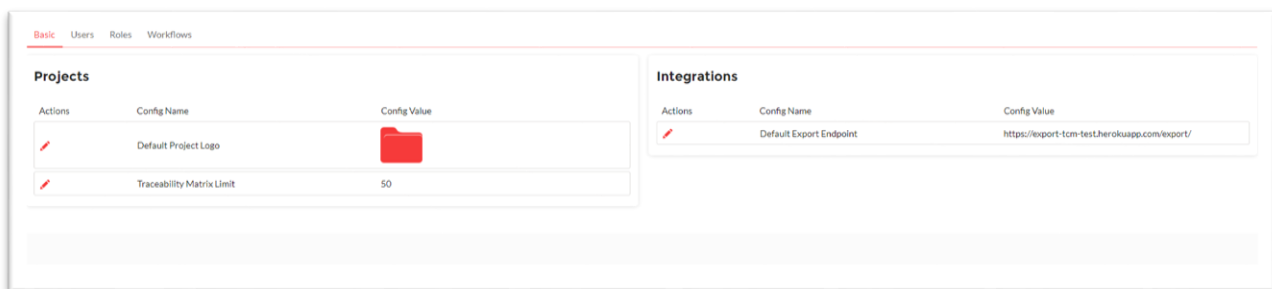
Global Configuration page is available for Admin User only.

The page shows general information about projects, users, roles and workflows.

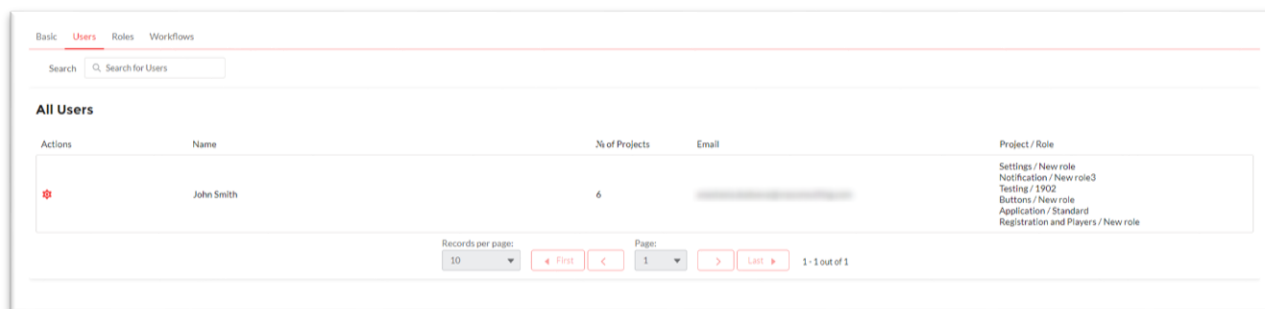
There are 4 tabs that represent general information on the Global Configuration page.



The Basic tab contains information about the default project logo, traceability matrix limit and default export endpoint.

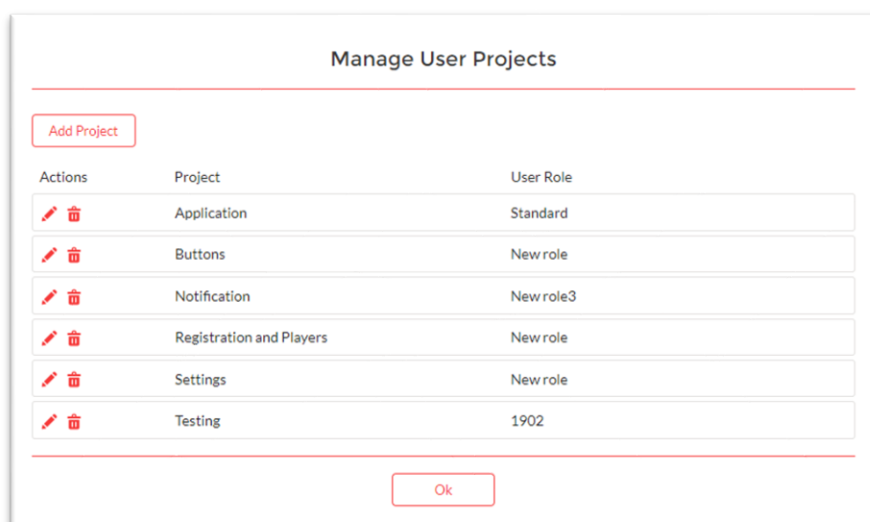


The User tab contains information about users that are assigned on projects.



Here users can manage users for projects, using gear menu.

Clicking by gear menu users are able to edit or delete users roles and add another available project, using the 'Add project' button.

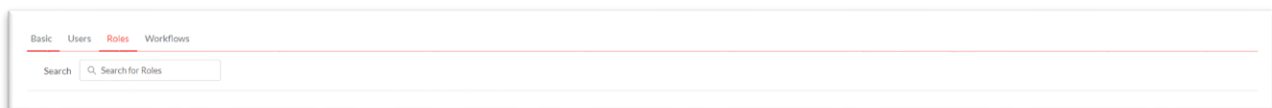


The Role tab contains information about project roles, its assignment. Here users are able to perform the following actions: edit, clone, delete roles.

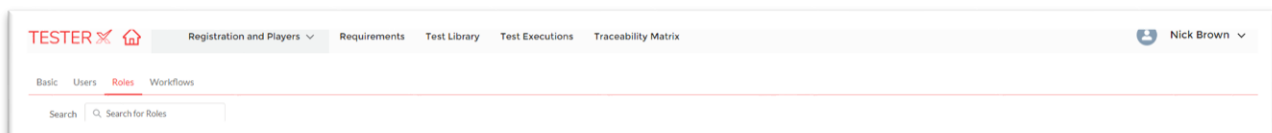
Actions	Project Name	Role Name	Assignments
	Testing	1902	1
	Settings	New role	1
	Registration and Players	New role	1
	Buttons	New role	1
	Testing	New role	0
	Buttons	New role2	0
	Notification	New role2	0
	Buttons	New role3	0
	Notification	New role3	1
	Application	Standard	1

Records per page: 10 | Page: 1 | 1 - 10 out of 11

Search line is used on Users, Roles and Workflows tabs and allows users to find necessary information.



Users are able to navigate to the Home page from Global Configuration Page, using the 'Back to Home' button.

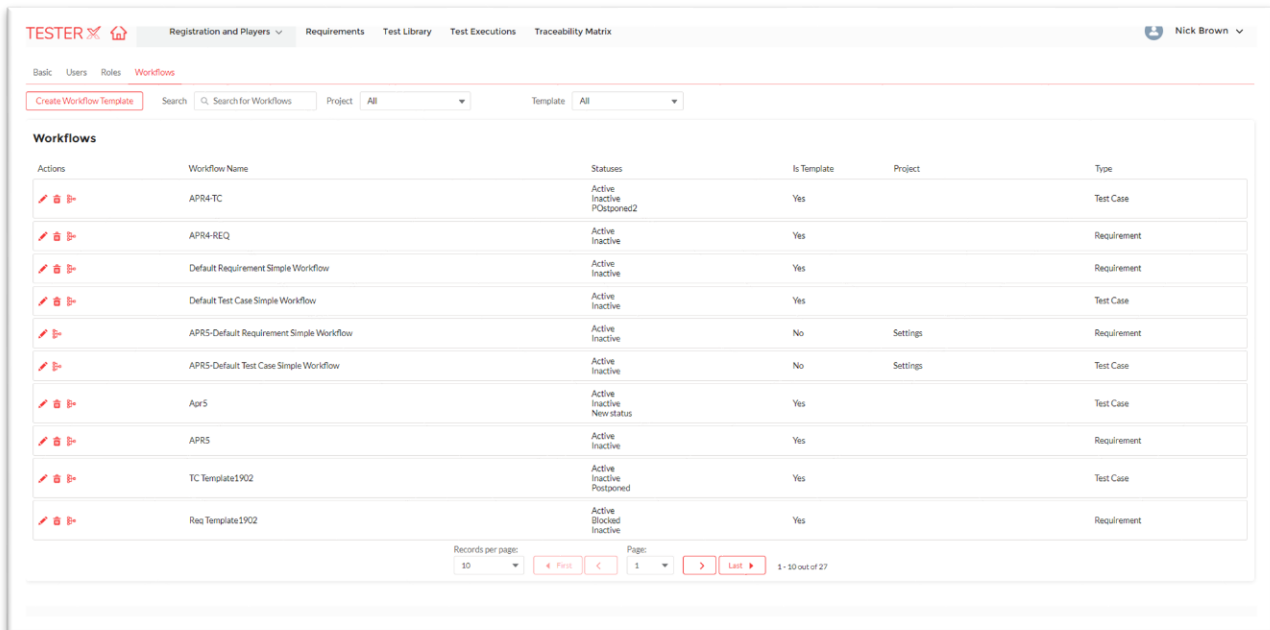


Workflows

The fourth tab on the Global Configuration Page is Workflows.

Workflows are used to show how a record's status is changed.

Here users have an ability to see general information about workflow and manage them: workflow's name, statuses, template, project and type.

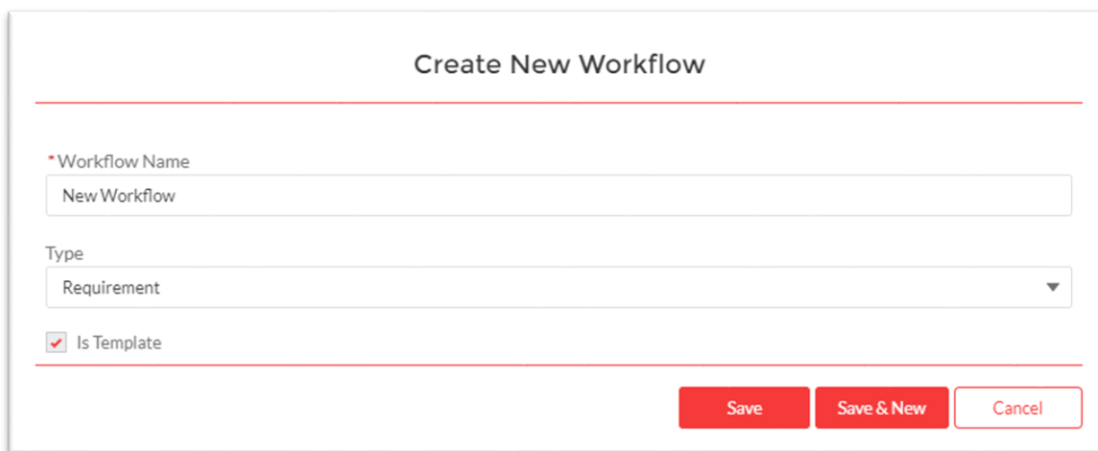


The screenshot shows the 'TESTER' application interface. At the top, there are navigation tabs: 'Registration and Players', 'Requirements', 'Test Library', 'Test Executions', and 'Traceability Matrix'. The 'Workflows' tab is selected. Below the tabs, there is a search bar with the text 'Search for Workflows' and a 'Project' dropdown set to 'All'. A 'Create Workflow Template' button is visible on the left. The main area displays a table of workflows.

Actions	Workflow Name	Statuses	Is Template	Project	Type
  	APR4-TC	Active Inactive Postponed2	Yes		Test Case
  	APR4-REQ	Active Inactive	Yes		Requirement
  	Default Requirement Simple Workflow	Active Inactive	Yes		Requirement
  	Default Test Case Simple Workflow	Active Inactive	Yes		Test Case
  	APR5-Default Requirement Simple Workflow	Active Inactive	No	Settings	Requirement
  	APR5-Default Test Case Simple Workflow	Active Inactive	No	Settings	Test Case
  	Apr5	Active Inactive New status	Yes		Test Case
  	APR5	Active Inactive	Yes		Requirement
  	TC Template1902	Active Inactive Postponed	Yes		Test Case
  	Req Template1902	Active Blocked Inactive	Yes		Requirement

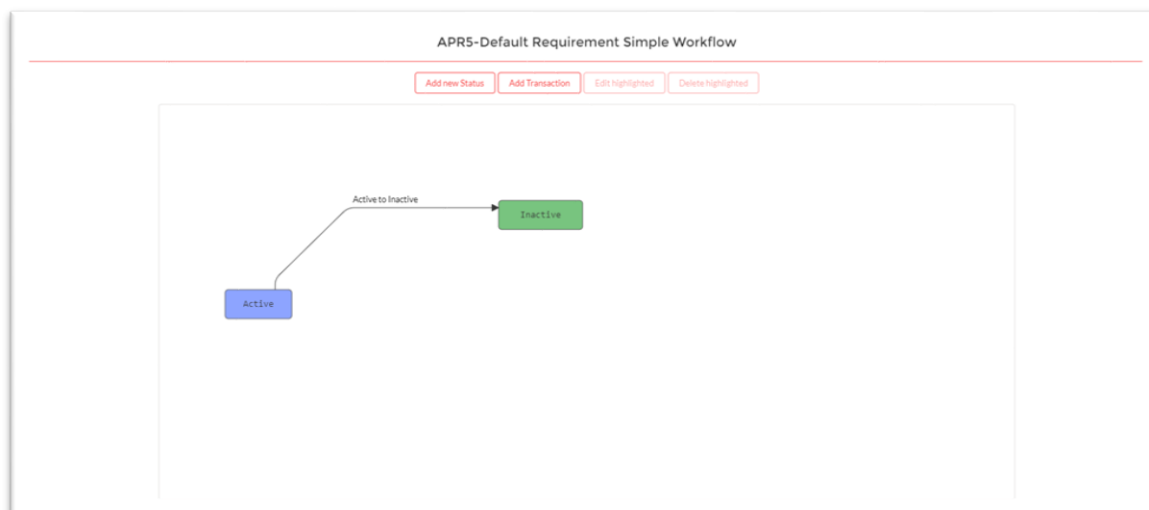
At the bottom of the table, there is a pagination control showing 'Records per page: 10', 'Page: 1', and '1 - 30 out of 27'.

Users are able to create a new workflow template, using the 'Create Workflow Template' button. Workflow template can be created for Requirement and Test cases.



The screenshot shows a 'Create New Workflow' form. It has a title 'Create New Workflow' at the top. Below the title, there is a section for 'Workflow Name' with a text input field containing 'New Workflow'. Below that, there is a 'Type' dropdown menu with 'Requirement' selected. At the bottom, there is a checkbox labeled 'Is Template' which is checked. At the bottom right, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

There are two default statuses of workflows: Active and Inactive with transaction between them.



Users have an ability to edit workflow name, add, edit or delete statuses and transactions, edit canvas using graph button both for default and custom workflows. Users are able to delete only custom workflows.

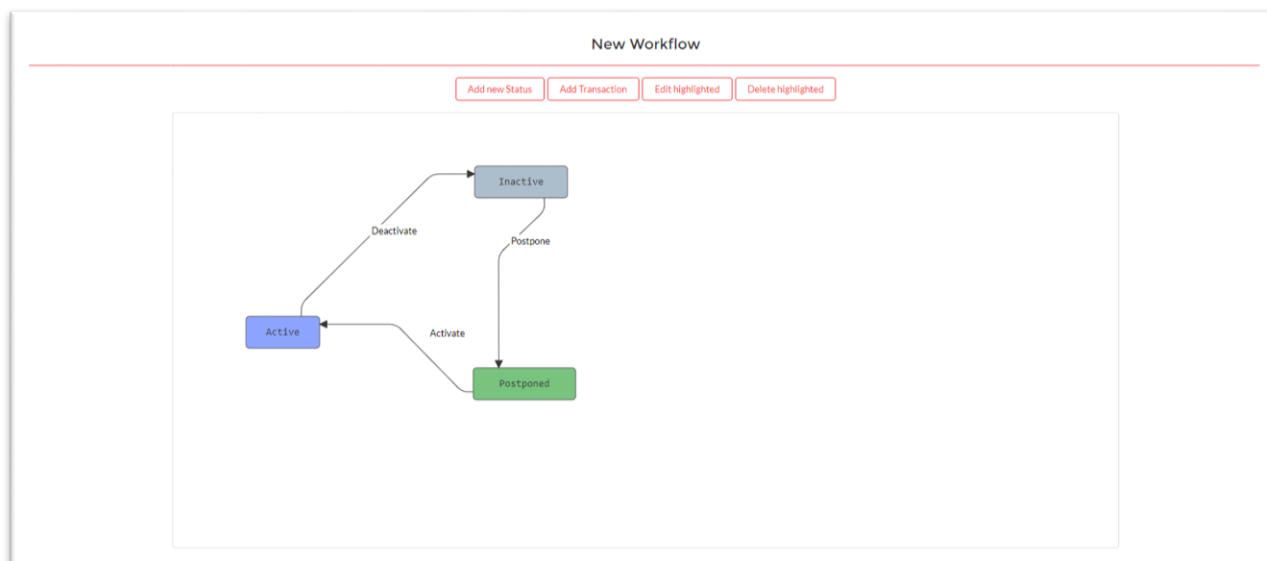
	New Workflow	Active Inactive	Yes	Requirement
Open Graph				

Edit Workflow

*Workflow Name

Type

☒ Is Template



Users aren't able to delete default workflow templates.

	TESTING-Default Test Case Simple Workflow	Active Inactive	No	Testing	Test Case
--	---	--------------------	----	---------	-----------

Note: Entry and End points should be activated in workflow for each single status and these statuses can't be deleted.

Edit Workflow Status

*Status Name
Active

☒ Is Entry Point
☐ Is End Point

Save Cancel

Edit Workflow Status

*Status Name
Postponed

☐ Is Entry Point

☒ Is End Point

Save Cancel

Users can also use filter at the top of the page, using dropdown list Project and Template.

TESTER Registration and Players Requirements Test Library Test Executions Traceability Matrix Nick Brown

Basic Users Roles **Workflows**

Create Workflow Template Search Search for Workflows Project All All All

Workflows

Actions	Workflow Name	Status	Is Template	Project	Type
	TESTING-Default Requirement Simple Workflow	Active Inactive Postponed	No	Testing	Requirement
	TESTING-Default Test Case Simple Workflow	Active Inactive	No	Testing	Test Case
	Test WF	Active Inactive Skipped	Yes		Requirement

At the bottom of the page users are able to navigate through pages.

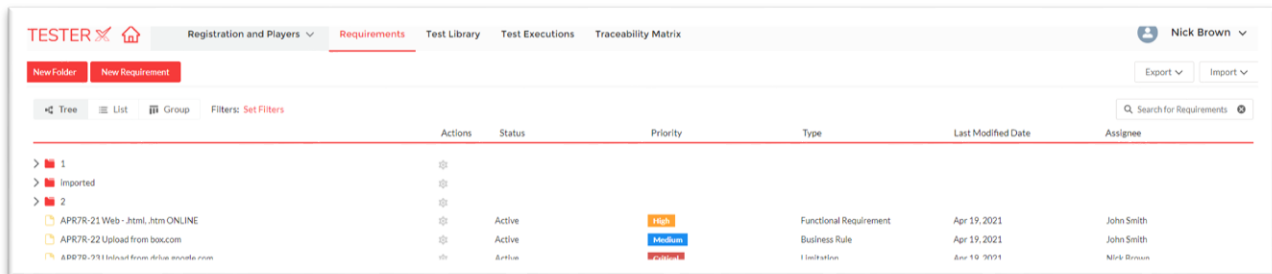
	Standard temp	Active Inactive Skipped	Yes		Requirement
	ANNASTA1-Default Requirement Simple Workflow	Active Inactive	No	Application	Requirement
	ANNASTA1-Default Test Case Simple Workflow	Active Inactive	No	Application	Test Case
	New Workflow	Active Inactive Postponed	Yes		Requirement

Records per page: 10 Page: 3 21 - 28 out of 28

Export

Overview

Files export allows users to download files from the TesterX App, using 'Export' button on the top of the page.

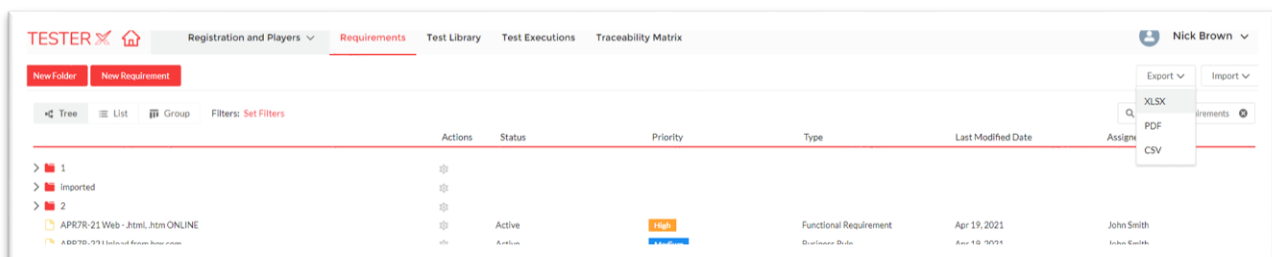


The screenshot shows the 'Requirements' tab in the TesterX application. At the top, there are tabs for 'Registration and Players', 'Requirements' (selected), 'Test Library', 'Test Executions', and 'Traceability Matrix'. Below these are buttons for 'New Folder' and 'New Requirement'. On the right, there is a user profile 'Nick Brown' and buttons for 'Export' and 'Import'. A search bar 'Search for Requirements' is also present. The main table has columns: Actions, Status, Priority, Type, Last Modified Date, and Assignee. The table contains three rows of requirements.

Actions	Status	Priority	Type	Last Modified Date	Assignee
	Active	High	Functional Requirement	Apr 19, 2021	John Smith
	Active	Medium	Business Rule	Apr 19, 2021	John Smith
	Active	Low	Installation	Apr 19, 2021	Nick Brown

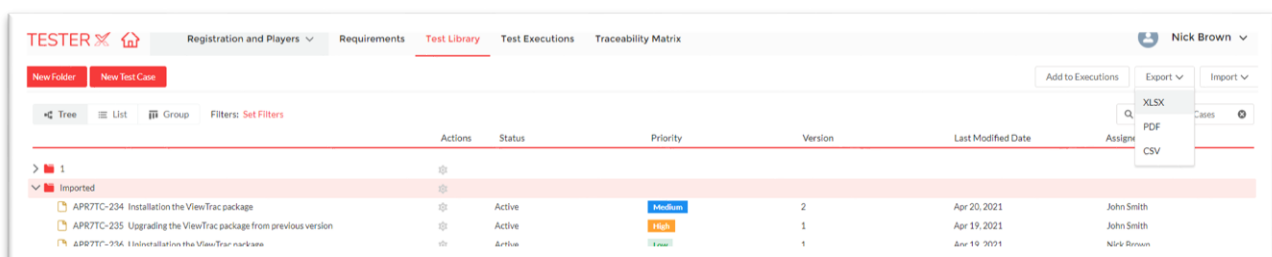
Users are able to export files in three formats: XLSX, PDF, CSV on following tabs:

Requirements



This screenshot is identical to the previous one, but with the 'Export' dropdown menu open, showing options for 'XLSX', 'PDF', and 'CSV'.

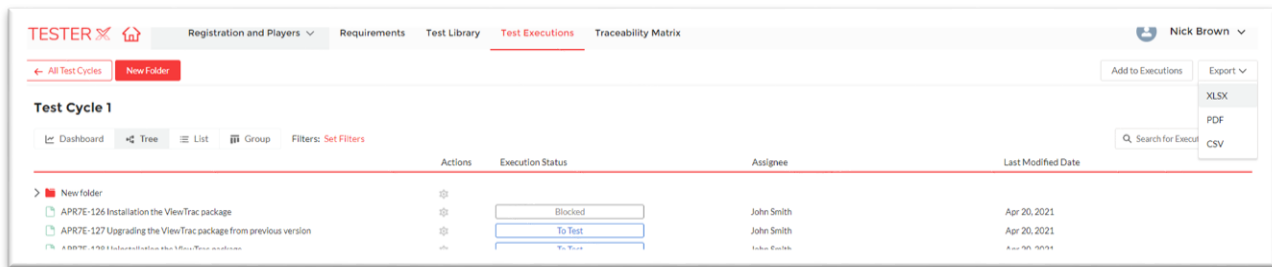
Test Library



The screenshot shows the 'Test Library' tab in the TesterX application. At the top, there are tabs for 'Registration and Players', 'Requirements', 'Test Library' (selected), 'Test Executions', and 'Traceability Matrix'. Below these are buttons for 'New Folder' and 'New Test Case'. On the right, there is a user profile 'Nick Brown', a button for 'Add to Executions', and buttons for 'Export' and 'Import'. A search bar 'Search for Cases' is also present. The main table has columns: Actions, Status, Priority, Version, Last Modified Date, and Assignee. The table contains three rows of test cases.

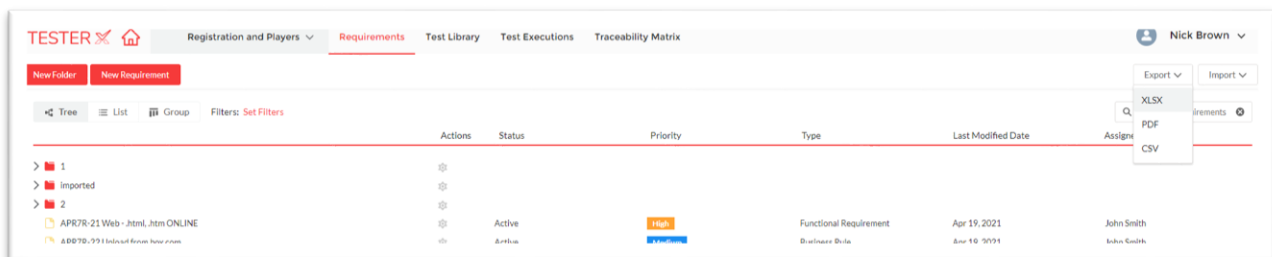
Actions	Status	Priority	Version	Last Modified Date	Assignee
	Active	Medium	2	Apr 20, 2021	John Smith
	Active	High	1	Apr 19, 2021	John Smith
	Active	Low	1	Apr 19, 2021	Nick Brown

Test Executions



Export to XLSX

In order to export a file in XLSX format click the 'Export' button at the top of the page on the particular tab and choose XLSX.



After opening Export Wizard form add sheet label (it can be renamed or deleted). Users are able to edit File name.

TESTER

EXPORT WIZARD

*File Name
Registration and Players - Requirements Apr 21, 2021

Excel Sheets
*Sheet Label
Add Rename Delete

Select fields

Available
Folder
Created By
Last Modified By
Reference
Labels
Status

Selected
Requirement Name

Requirements to Export

Available Requirements

- > 1
- > Imported
- > 2
- APR7R-21 Web - .html, .htm ONLINE
- APR7R-22 Upload from box.com
- APR7R-23 Upload from drive.google.com
- APR7R-24 Upload from dropbox.com
- APR7R-25 Multiselect uploading
- APR7R-26 Screen Only
- APR7R-27 ScreenTrac - Settings
- APR7R-29 MP4 Player - preview for .mp4 and .webm
- APR7R-30 MP4 Player - "In Progress" Screen
- APR7R-31 MP4 Player - playing video files after conversion
- APR7R-32 MP4 Player - mp4 with subtitles
- APR7R-33 PDF Player - launching PDF
- APR7R-34 Vimeo Player - launching Vimeo
- APR7R-35 Vidyad Player - launching Vidyad
- APR7R-36 launching HTML uploaded from Web
- APR7R-43 Enable PDF Download
- APR7R-44 External Services
- APR7R-45 Registration Domain
- APR7R-47 Registration ViewTrac with Backend - New Dev Sandbox
- APR7R-48 Registration ViewTrac with Backend - New Dev Sandbox
- APR7R-49 Registration ViewTrac with Backend - New Dev Sandbox
- APR7R-50 Registration ViewTrac with Backend - New Dev Sandbox

Export Cancel

Then select certain fields from the available list. Drag and drop folder with records or just records from right side to left.

TESTER

EXPORT WIZARD

*File Name
Registration and Players - Requirements Apr 21, 2021

Excel Sheets
Reqs Export1
*Sheet Label
Reqs Export1
Add Rename Delete

Select fields

Available
Folder
Record ID
Last Modified Date
Notes
Source
Type

Selected
Requirement Name
Description
Status
Priority
Created Date
Created By

Requirements to Export

- APR7R-21 Web - .html, .htm ONLINE
- APR7R-22 Upload from box.com
- APR7R-23 Upload from drive.google.com
- APR7R-24 Upload from dropbox.com
- APR7R-25 Multiselect uploading

Available Requirements

- > 1
- > Imported
- > 2
- APR7R-21 Web - .html, .htm ONLINE
- APR7R-22 Upload from box.com
- APR7R-23 Upload from drive.google.com
- APR7R-24 Upload from dropbox.com
- APR7R-25 Multiselect uploading
- APR7R-26 Screen Only
- APR7R-27 ScreenTrac - Settings
- APR7R-29 MP4 Player - preview for .mp4 and .webm
- APR7R-30 MP4 Player - "In Progress" Screen
- APR7R-31 MP4 Player - playing video files after conversion
- APR7R-32 MP4 Player - mp4 with subtitles
- APR7R-33 PDF Player - launching PDF
- APR7R-34 Vimeo Player - launching Vimeo
- APR7R-35 Vidyad Player - launching Vidyad
- APR7R-36 launching HTML uploaded from Web
- APR7R-43 Enable PDF Download
- APR7R-44 External Services
- APR7R-45 Registration Domain
- APR7R-47 Registration ViewTrac with Backend - New Dev Sandbox
- APR7R-48 Registration ViewTrac with Backend - New Dev Sandbox
- APR7R-49 Registration ViewTrac with Backend - New Dev Sandbox
- APR7R-50 Registration ViewTrac with Backend - New Dev Sandbox

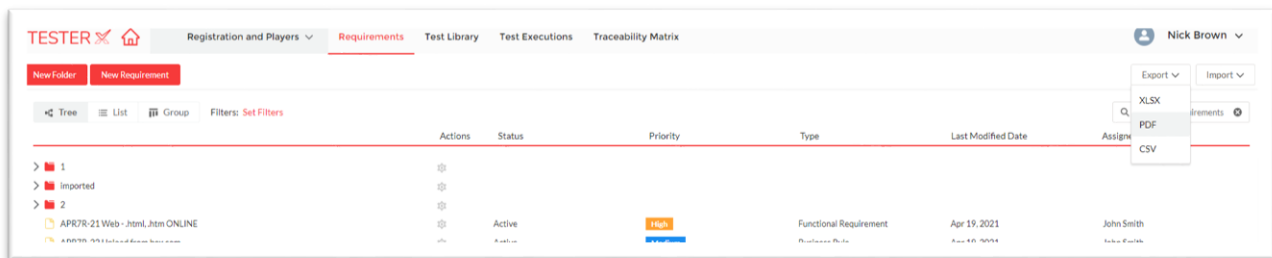
Export Cancel

Click export, open downloads on your PC and confirm that there is a downloaded file in format XLSX successfully with all necessary information.

Requirement Name	Description	Status	Priority	Created Date	Created By	Last Modified By	Labels	Reference
APR7R-21 Web - .html_.htm ONLINE	System Admin is able to install the ViewTrac package from scratch; users, customers should	Active	High	Apr 8, 2021	John Smith	Nick Brown	Installation	Spreadsheet
APR7R-22 Upload from box.com	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-23 Upload from drive.google.com	System Admin is able to uninstall the ViewTrac package if needed	Active	Critical	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-24 Upload from dropbox.com	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-25 Multiselect uploading	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-26 Screen Only	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-27 ScreenTrac - Settings	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-29 MP4 Player - preview for .mp4 and .webm	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-30 MP4 Player - "In Progress" Screen	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-31 MP4 Player - playing video files after conversion	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-32 MP4 Player - mp4 with subtitles	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-33 PDF Player - launching PDF	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-34 Vimeo Player - launching Vimeo	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-35 Vidyard Player - launching Vidyard	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-36 launching HTML uploaded from Web	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-43 Enable PDF Download	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-44 External Services	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-45 Registration Domain	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-47 Registration ViewTrac with Backend - New Dev Sandbox	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-48 Registration ViewTrac with Backend - New Dev Sandbox	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-49 Registration ViewTrac with Backend - New Dev Sandbox	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	
APR7R-50 Registration ViewTrac with Backend - New Dev Sandbox	System Admin is able to upgrade the ViewTrac package from previous versions	Active	Medium	Apr 8, 2021	John Smith	Nick Brown	Installation	

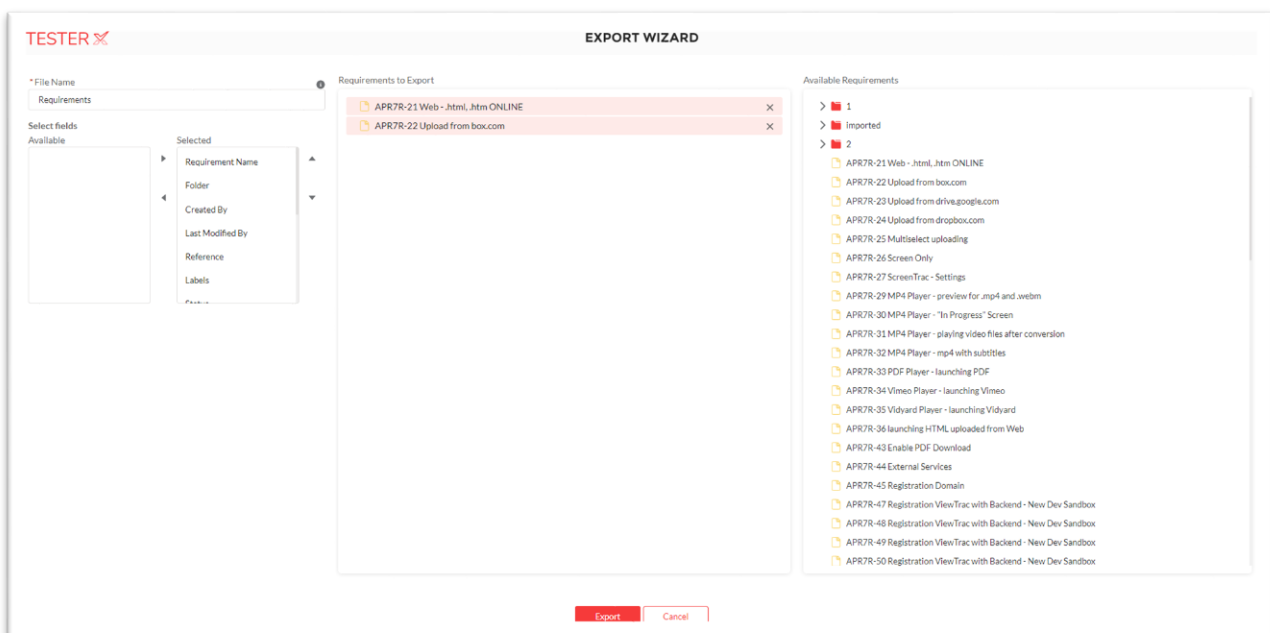
Export to PDF

In order to export a file in PDF format click the 'Export' button at the top of the page on the particular tab and choose PDF.



Then select certain fields from the available list.

Drag and drop folder with records or just records from right side to left. Users are able to edit File name.



Click export, open downloads on your PC and confirm that there is a downloaded file in format PDF, successfully with all necessary information.

Project Name: Registration and Players

Project Code: APR7

APR7R-21 Web - .html, .htm ONLINE

Folder: Root Folder	Created By: John Smith
Last Modified By: Nick Brown	Labels: Installation
Status: Active	Record ID: a5q0R000000eHC0QAM
Created Date: Apr 8, 2021	Last Modified Date: Apr 19, 2021
Priority: High	Source: Documentation
Type: Functional Requirement	

Description:

System Admin is able to install the ViewTrac package from scratch; users, customers should be notified

Notes:

New version of app, see steps in guide

Reference:

spreadsheet: <https://www.https://docs.google.com/spreadsheets>**APR7R-22 Upload from box.com**

Folder: Root Folder	Created By: John Smith
Last Modified By: Nick Brown	Labels:
Status: Active	Record ID: a5q0R000000eHC1QAM
Created Date: Apr 8, 2021	Last Modified Date: Apr 19, 2021
Priority: Medium	Source: Focus Group
Type: Business Rule	

Description:

System Admin is able to upgrade the ViewTrac package from previous versions

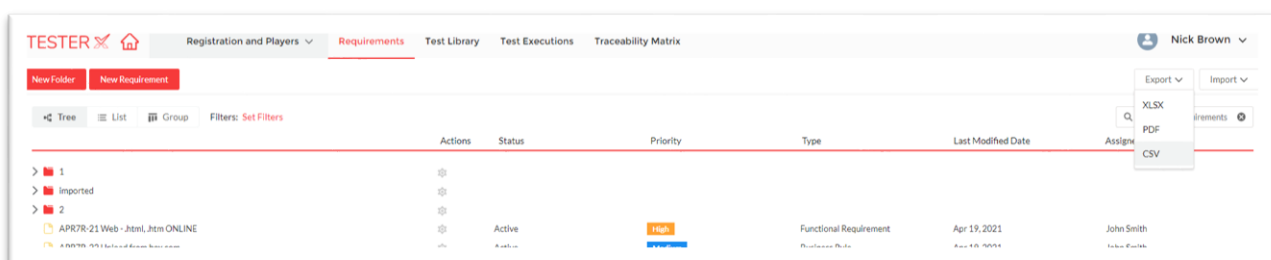
Notes:

New version of app, see steps in guide; users, customers should be notified

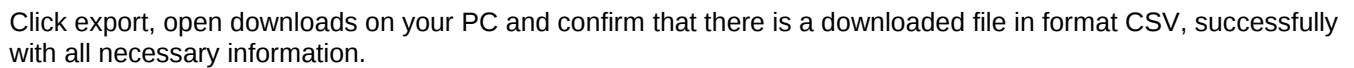
Reference:

Export to CSV

In order to export a file in CSV format click the 'Export' button at the top of the page on the particular tab and choose CSV.



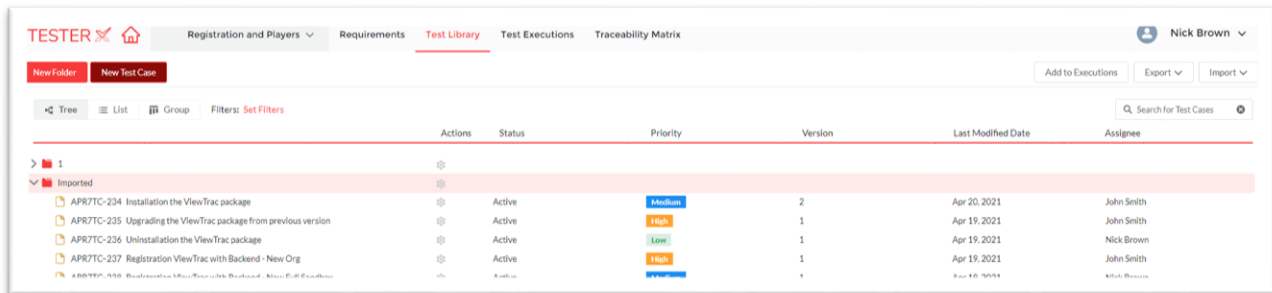
Then select certain fields from the available list. Drag and drop folder with records or just records from right side to left. Users are able to edit File name.



Import Overview

Users are able to import files in CSV format only on following tabs:

Requirements Test Library

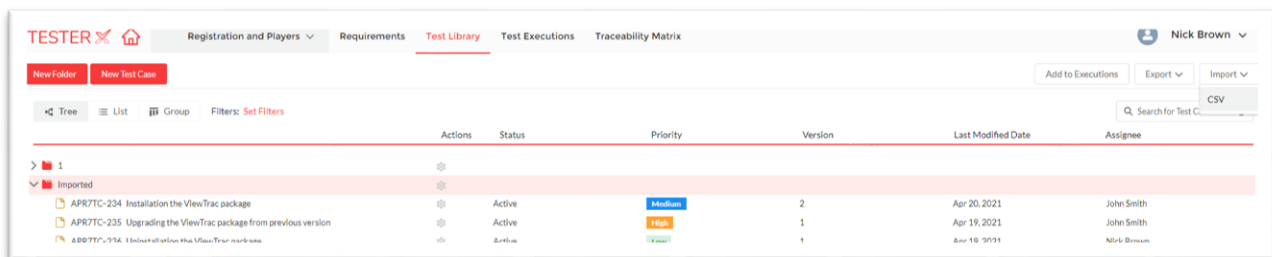


The screenshot shows the 'Test Library' tab in the TesterX application. It features a table with columns: Actions, Status, Priority, Version, Last Modified Date, and Assignee. The table lists several test cases under the 'Imported' folder, including 'APR7TC-234 Installation the ViewTrac package' and 'APR7TC-235 Upgrading the ViewTrac package from previous version'. The interface also includes navigation tabs like 'Registration and Players', 'Requirements', 'Test Executions', and 'Traceability Matrix'.

Actions	Status	Priority	Version	Last Modified Date	Assignee
⚙	Active	Medium	2	Apr 20, 2021	John Smith
⚙	Active	High	1	Apr 19, 2021	John Smith
⚙	Active	Low	1	Apr 19, 2021	Nick Brown
⚙	Active	High	1	Apr 19, 2021	John Smith
⚙	Active	Low	1	Apr 19, 2021	Nick Brown

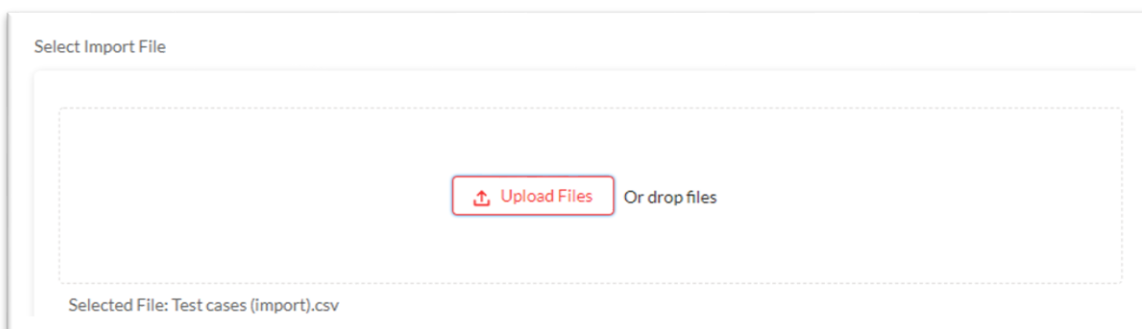
Import to CSV

In order to import files into the TesterX App click the 'Import' button at the top of the page of a certain tab and choose CSV.



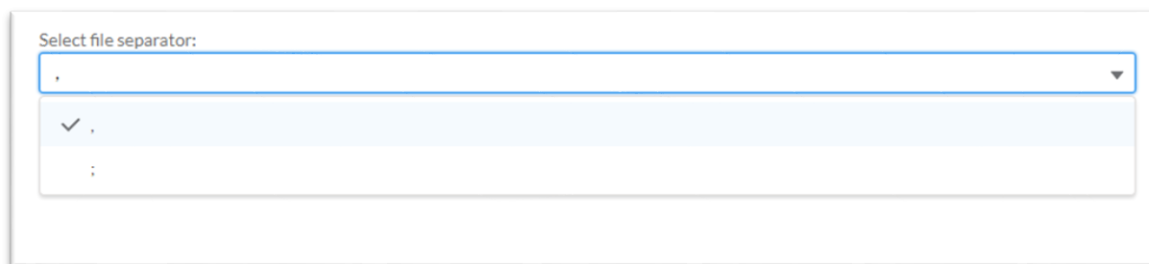
This screenshot is identical to the previous one, but with the 'Import' button in the top right corner of the interface highlighted, indicating the next step in the process.

After opening the Import Wizard form, select the CSV file from your PC, using the 'Upload File' button.



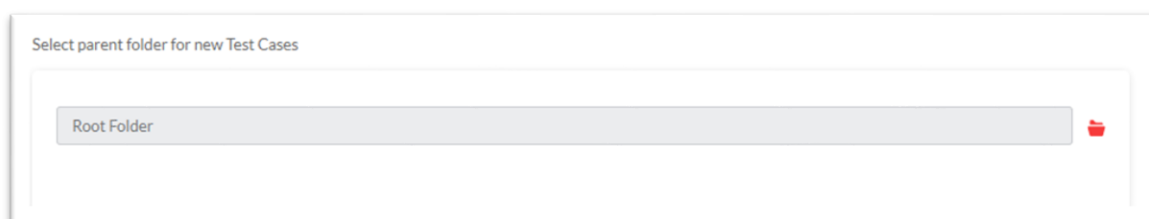
The screenshot shows the 'Select Import File' dialog box. It contains a large dashed box for file selection, an 'Upload Files' button with an upload icon, and the text 'Or drop files'. Below the dialog, it shows 'Selected File: Test cases (import).csv'.

Select separator, to separate file's values in the document.

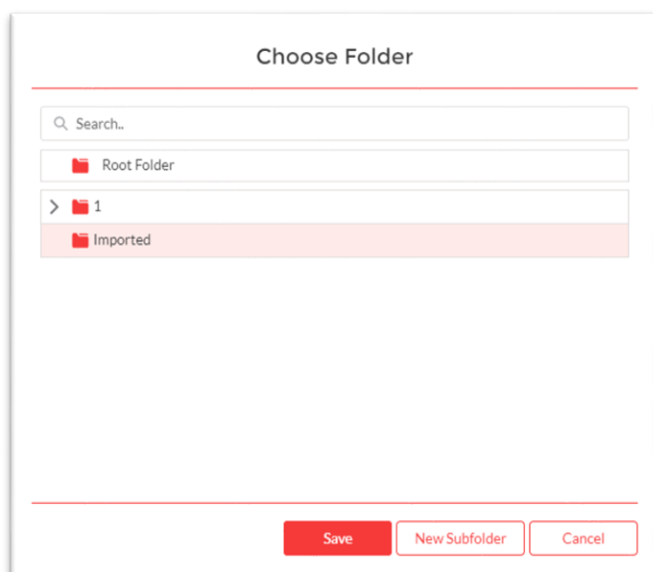


A dialog box titled "Select file separator:". It features a dropdown menu with a comma (,) selected. Below the dropdown, there is a list of options: a checked comma (,) and a semicolon (;).

Then choose the parent folder for uploaded records: it can be the Root Folder, any existing folder or users are able to add a new folder while importing the file, using the 'new subfolder' button, click save, click next.



A dialog box titled "Select parent folder for new Test Cases". It shows a single folder named "Root Folder" in a list. To the right of the list is a red trash icon.



A dialog box titled "Choose Folder". It has a search bar at the top. Below it, there is a list of folders: "Root Folder", "1", and "Imported". The "Imported" folder is highlighted. At the bottom, there are three buttons: "Save", "New Subfolder", and "Cancel".

Now users should map requirements and test cases field's values with field's values from the CSV file. Click next.

Requirements field's values:

TESTER  IMPORT WIZARD

Progress bar: 0% to 100%

Edit	CSV Header	Mapped Api Name	Requirements Field	Example
Change	Requirement Name	test_x_Requirement_Name_c	Requirement Name	R-1 Web - Jhtml, Jhtml ONLINE
Map	Folder		Unmapped	Root Folder
Map	Created By		Unmapped	John McGeady
Map	Last Modified By		Unmapped	John McGeady
Map	Reference		Unmapped	
Change	Labels	Labels	Labels	Creation; Installation
Map	Status		Unmapped	Active
Map	Record ID		Unmapped	a0A6D0000031kyUAA
Map	Created Date		Unmapped	Apr 1, 2021
Map	Last Modified Date		Unmapped	Apr 1, 2021
Change	Description	test_x_Description_c	Description	System Admin is able to install the ViewTrac package from scratch use...
Change	Notes	test_x_Notes_c	Notes	New version of app, see steps in guide
Change	Priority	test_x_Priority_c	Priority	Medium
Change	Source	test_x_Source_c	Source	Documentation
Change	Type	test_x_Type_c	Type	Business Rule

* Incorrect picklist values will be defaulted

Previous Next Cancel

Test Cases field's values:

TESTER  IMPORT WIZARD

Progress bar: 0% to 100%

Edit	CSV Header	Mapped Api Name	Test Cases Field	Example
Map	Unique ID		Unmapped	VTReg001
Map	Package		Unmapped	ViewTrac
Change	Priority	test_x_Priority_c	Priority	High
Map	Module		Unmapped	Installation
Map	Role/Profile		Unmapped	SystemAdmin
Map	Reference		Unmapped	
Map	Name		Unmapped	Installation the ViewTrac package
Change	Description	test_x_Description_c	Description	
Change	Pre-requisites	test_x_Pre-requisites_c	Pre-requisites	
Map	Steps		Unmapped	
Map	Expected results		Unmapped	System Admin is able to install the ViewTrac package from scratch
Map	Notes		Unmapped	It's better to have more info "how to do it", some steps

* Incorrect picklist values will be defaulted

Previous Next Cancel

On the last page users can check all information about the imported file: selected object, selected folder, selected file, total number of records. Fields that were mapped and not mapped.

TESTER

IMPORT TEST CASES

Review & Start Import

Your selections:

Your selections: Selected object: Test Cases Selected folder: Imported Selected File: Test cases (import).csv Number of records: 108	Fields mapped: 7 Fields	Fields not mapped: 5 Fields
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[Previous](#) [Import](#) [Cancel](#)

If users would like to return to the previous page to change something, they can use the 'Previous' button. If everything is OK, click the 'Import' button.

TESTER

IMPORT TEST CASES

Import Completed

[Done](#)

After clicking on 'Done' button, Users will be redirected to a particular tab where they decided to import the file. Open the selected folder and confirm that records were imported successfully with all necessary information.

