



**SpiraTest<sup>®</sup>, SpiraPlan<sup>®</sup>, SpiraTeam<sup>®</sup>**

**User Manual**

Version 5.4

Inflectra Corporation



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# 1. Introduction

The Spira™ family of applications from Inflectra® are a powerful set of tools that help you manage your software lifecycle.

SpiraTest® is our powerful and easy to use requirements, test and defect management system, ideal for quality assurance teams.

SpiraTeam® is our integrated Application Lifecycle Management (ALM) system that manages your project's requirements, releases, test cases, issues and tasks in one unified environment.

SpiraPlan® expands on the features in SpiraTeam® to provide a complete Enterprise Agile Planning® solution that lets you manage projects, programs and the entire organization with ease.

This user manual outlines the features and functionality available in all three Spira™ products, and demonstrates how to use the system on a typical project.

## 1.1. Quality Assurance

Quality Assurance is a key component of the Software Development Life-Cycle (SDLC), which needs to be integrated into the planning and management of a program or project from its inception. Too often though, QA is implemented as *Quality Control* - whereby testing that

the required functionality works as expected, is performed at the end, when it is most costly to make corrections and changes.

To manage QA across a project from day one, it is imperative that the original requirements are documented together with the use-cases that validate the desired functionality. These use-cases then form the basis of the test scripts that can be executed to validate that the functionality has been correctly built, and that the requirements have been satisfied. During the execution of these test scripts, failures may occur, which are recorded as *incidents* - either to be fixed or documented depending on the severity.

Typically, these activities require people to use at least three different types of software:

- Requirements Management
- Test Script Management
- Defect / Issue / Bug Tracking

However, this stove-piped approach has many limitations and drawbacks, most importantly the fact that there is no *traceability* between the different artifacts. How can the project manager know that all the requirements have been tested? Conversely, how can the developer know which test script was responsible for a recorded bug – needed to accurately reproduce the issue?

## 1.2. Project Management

As described in the Agile Manifesto, traditional waterfall software methodologies and lifecycles have failed to delivery projects on-time and on-

budget. In addition, many systems built this way will fail to provide the expected business value as there is no ability to quickly refine the requirements as the project progresses.

Consequently, software development has been transformed with these new ideas and concepts, with new agile methodologies such as Scrum, and Kanban becoming common. However,

the traditional tools of project management - requirements specifications, high level project plans, GANTT charts, white-board schedules and top-down task management - are too cumbersome and not well suited.

SpiraTeam® provides a complete Agile Project Management System in one package, that can manage your project's requirements, releases, iterations, tasks and issues in one environment, fully synchronized.

## 2. Functionality Overview

This section outlines the functionality provided by SpiraTeam® in the areas of requirements management, test case management, release planning, iteration planning, incident tracking, task management and project / user management.

Please note, that SpiraTeam® is designed for use on a very wide range of devices from desktops, to tablets, to smartphones. This guide is written using desktop conventions (e.g. using 'click' throughout where 'tap' would apply on mobile devices) but the functionality remains very similar throughout the application across all devices and platforms. See section 14 for more information.

### 2.1. Requirements Management

SpiraTeam® provides the ability to create, edit and delete project scope / requirements in a hierarchical organization that resembles a typical scope matrix. Each requirement is associated with a particular importance level (ranging from critical to low) and a status identifier that designates where the requirement is in the development lifecycle (requested, planned, in-progress and completed). The requirements can be organized according to which part of the system they relate to (called the Component) as well as being organized into different types (features, qualities, use cases, etc.). Certain types (such as use cases) also allow you to define the scenario steps that help describe requirement.

In addition, each requirement is mapped to one or more test cases that can be used to validate that the functionality works as expected. This mapping is called the "Requirement Test Coverage", since the test cases "cover" the requirement so that if all the tests can be executed successfully, then the requirement is validated.

At the same time, from a development perspective, the team begins initial estimation of the lowest-level requirements in the requirements matrix to determine the complexity and associated resourcing. Once the high-level release schedule has been determined, the requirements can then be prioritized and scheduled against the appropriate release according to their business priority.

Once the release is underway, the requirements are further decomposed into their constituent low-level project tasks that can be assigned to the project team. The system will track the progress and revised estimates for the tasks and display them against the requirements so that risks to the schedule can be quickly determined.

### 2.2. Test Case Management

SpiraTeam® provides the ability to create, edit and delete project test cases that are stored in a hierarchical folder structure that resembles Windows Explorer®. Each test case consists of a set of test steps that represent the individual actions a user must take to complete the test. These test steps also

contain a description of the expected result and any sample data elements that the tester should use when performing the action. When a user executes a test case, the results are stored in a test run that contains the success/failure status of each test step as well as the actual observed result that the tester experienced.

In addition each test case is mapped to one or more requirements that the test is effectively validating, providing the test coverage for the requirement. During the execution of the test case, each failure can be optionally used to record a new incident, which can then be managed in the incident tracking module (see below). This provides complete traceability from a recorded incident to the underlying requirement that was not satisfied.

To streamline the assignment and tracking of multiple test cases, SpiraTeam® allows users to select groups of test cases and arrange them into *test sets*. Each test set can contain test cases from a variety of different folders and can be associated with a specific release of the system being tested.

### **2.2.1. Test Automation**

As well as being able to store and manage manual test cases, SpiraTeam® can be used to manage the scheduling and execution of automated test scripts for a variety of third-party test automation engines. This allows you to centrally plan your automated testing and monitor the results of automated unit, functional and load testing remotely. For example, you could schedule a set of automated functional tests to run on five different machines (each with a different browser/OS combination) at 2:00 AM and have the results be ready for the next morning.

## **2.3. Release Planning**

SpiraTeam® provides the ability to track different versions / releases of the application being tested. Each project in the system can be decomposed into an unlimited number of specific project releases, denoted by name and version number. Requirements and Test Cases developed during the design phase can then be assigned to these different releases. When a tester executes a series of test cases, they are able to choose the version of the project being tested and the resulting test run information is then associated with that release.

From a project planning perspective, the releases are the major milestones in the project, which are further sub-divided into iterations which are separate mini-projects with associated project scope and tasks. The project's requirements are scheduled at a high-level against the releases and the detailed tasks are scheduled against specific iteration within the release.

In addition, all incidents raised during the testing process are associated with this release, allowing the development team to easily determine which version of the project is affected. Finally as the incidents are

resolved and verified during the testing phase, the appropriate release can be selected to indicate which release the incident was resolved and/or verified in.

## *2.4. Iteration Planning*

As described in section 2.3, in addition to high-level project releases, SpiraTeam® can also track the individual iterations that comprise a release, giving the project manager the option to manage agile methodology projects within the SpiraTeam® environment. Unlike the release planning stage, where high-level requirements are estimated and scheduled, the iteration planning phase involves assigning each of the requirements, incidents and tasks in the project backlog against a specific iteration until the available effort in the iteration has been completely allocated.

When you first create iterations, you specify the start and end-dates together with the notional number of project resources assigned to the iteration and any non-working days. SpiraTeam® uses this information to calculate the planned effort available to the iteration, from which it will subtract the estimated task and incident effort values to determine how much effort is available to schedule.

## *2.5. Incident Tracking*

SpiraTeam® provides the ability to create, edit, assign, track, manage and close incidents that are raised during the testing of the software system under development. These incidents can be categorized into bugs, enhancements, issues, training items, limitations, change requests, and risks, and each type has its own specific workflow and business rules. Typically each incident is raised initially as a 'New' item of type 'Incident'. Following the review by the project manager and customer, they are changed to one of the other specific types, given a priority (critical, high, medium or low), and status changed to 'Open'. Once it is assigned to a developer for fixing, it is changed to status 'Assigned'.

The developer now works to correct the incident, after which time its status changes to 'Fixed' or 'Not Reproducible' depending on the actions taken (or not taken). Finally the project manager and customer verify that it has indeed been fixed, and the status is changed to 'Closed'. SpiraTeam® provides robust sorting and filtering of all the incidents in the system, as well as the ability to view the incidents associated with particular test cases and test runs, enabling drill-down from the requirements coverage display, right through to the open incidents that are affecting the requirement in question.

## *2.6. Task Management*

As described above, in addition to storing the requirements for a project, SpiraTeam® includes the capability of drilling each lowest-level requirement down further into a series of work items called 'Tasks'. These tasks are the discrete activities that each member of the development team would need to carry out for the requirement to be fulfilled. Each task can be assigned to an individual user as well as



associated with a particular release or iteration. The system can then be used by the project manager to track the completion of the different tasks to determine if the project is on schedule.

The tasks can be organized into different folders as well as categorized by different types (development, testing, infrastructure, etc.), each of which can have its own *workflow* which defines the process by which the task changes status during the project lifecycle.

## *2.7. Projects and Users*

SpiraTeam® supports the management of an unlimited number of users and projects, which can be administered through the same web interface as the rest of the application. All artifacts (requirements, tests and incidents) are associated with a particular project, and each user of the system can be given a specific role for the particular project. So, a power user of one software project may be merely an observer of another. That way, a central set of users can be managed across the enterprise, whilst devolving project-level administration to the manager of the project. In addition to these administration functions, each user profile and project has its own personalized dashboard view of all the pertinent and relevant information. This feature reduces the information overload associated with managing such a rich source of project information, and allows a single user or project snapshot to be viewable at all times for rapid decision-making.

## *2.8. Document Management*

SpiraTeam® includes an integrated document management collaboration system that can be used to upload, manage and share documents between the different members of the project. This module includes support for uploading files and URLs, versioning of documents, the ability to organize into folders and categorize and search using meta-tags.

## *2.9. Source Code Tracking*

SpiraPlan® and SpiraTeam® provide the ability to browse your source code repository from within the main web application. This is an excellent way for managers and casual users of the project to browse the files and revisions of the software code without needing to install the version control software on their own workstations. In addition all users have the ability to link source code revisions with SpiraTeam® artifacts—providing traceability from requirements, incidents, and tasks to the code changes that were made to implement the required feature, or fix the identified defect. Should a defect resurface later, you can view the associated source code revisions to determine which changes were made and did they truly correct the defect.

## *2.10. Build Management*

SpiraTeam® includes the ability to integrate with a variety of continuous integration / automated build servers so that the results of automated builds can be displayed in SpiraTeam linked to the associated

release or iteration. In addition, the results of automated tests and source code operations can be linked to the build events, providing traceability from a specific build to the bugs that were fixed, tests that were run and source code files that were modified.

### 2.11. Instant Messenger

SpiraTeam® comes with a build-in integrated instant messaging capability. This lets users see which users are currently logged-into the system, maintain a list of contacts and where available, send short instant messages to other users. Any messages exchanged can then be posted to relevant artifacts in the system as permanent comments.

### 2.12. Miscellaneous

#### 2.12.1. Artifact Relationships

The sections above have outlined the different features and functions available in the system, and have described the various artifacts managed in the system (e.g. projects, users, requirements, tests, etc.). To aid in understanding how the information is related, the following diagrams illustrates the relationships between the different artifacts and entities:

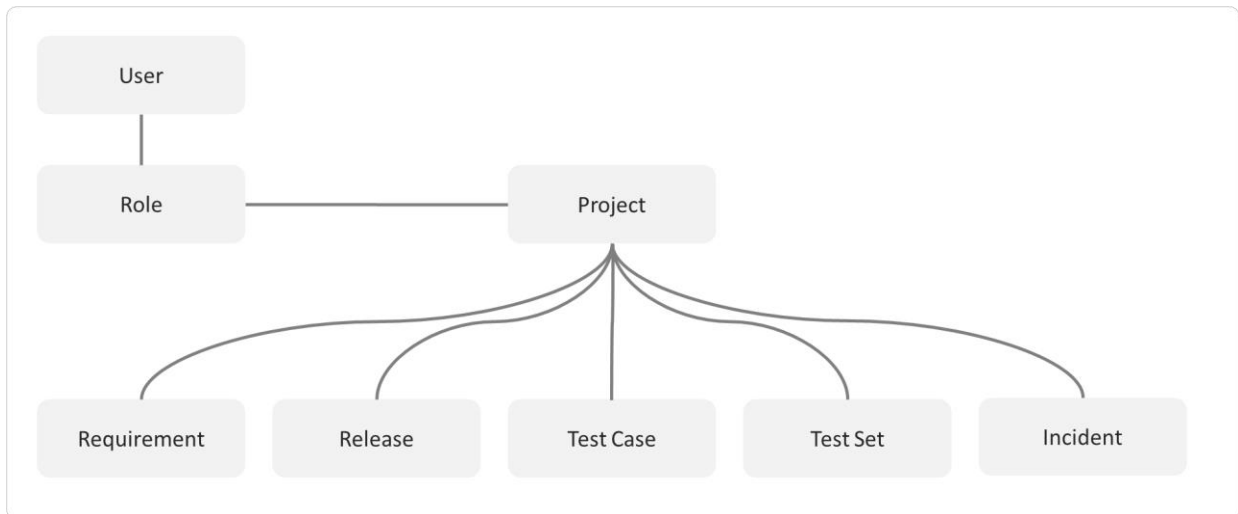


Figure 1: The main entities that comprise a SpiraTest project.

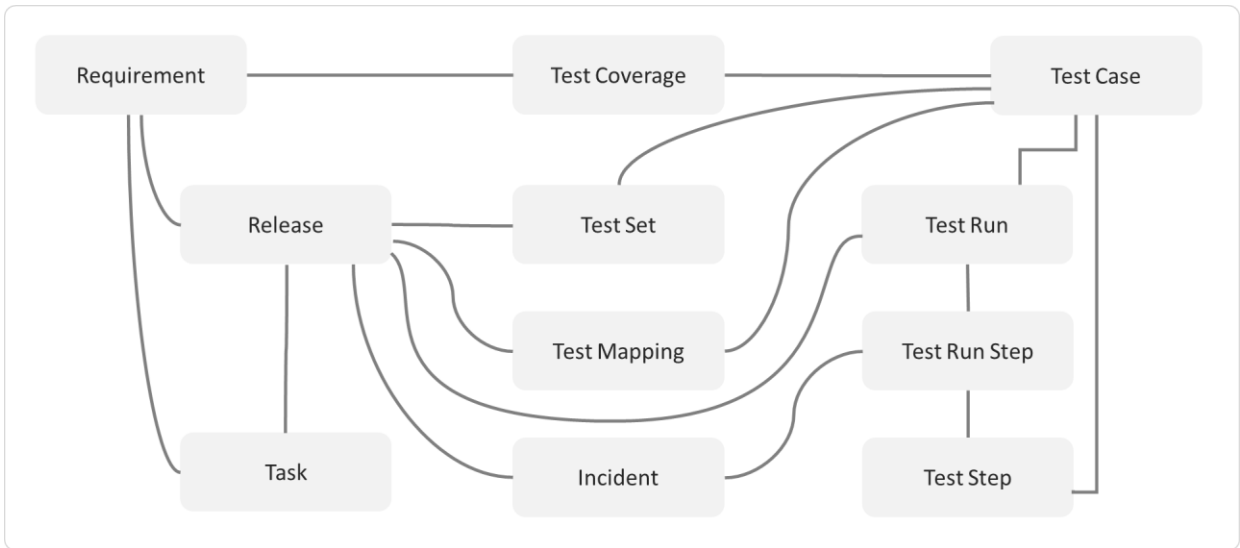


Figure 2: The relationships between the various SpiraTest entities

With these overall concepts in mind, the rest of this help manual will outline the functionality in each of the SpiraTeam® screens, and provide specific information on how to manage each of the artifacts illustrated above. Note that this manual does not explain the Administration-level functionality of the system; for that, please refer to the *SpiraTeam® Administration Guide*.













### 2.12.2. Artifact Naming Conventions










On various screens in the system, you will see lists of artifacts (requirements, test cases, etc.) together with a unique identification number. In order to make it easier to recognize at a glance which type of artifact the identification number refers to, SpiraTeam® uses a system of two-letter prefixes which help identify the type of artifact being displayed. The current prefixes used by the system are:

Artifact	Prefix	Artifact	Prefix
Project	PR	Project Group	PG
User	US	Incident Type	IT
Requirement	RQ	Incident Priority	IP
Requirement Step	RS	Incident Severity	IV
Test Case	TC	Workflow	WK
Test Step	TS	Workflow Transition	WT

Test Run	TR	Custom Property Values	PV
Test Run Step	RS	Project Role	RX
Incident	IN	Task	TK
Incident Status	IS	Test Set	TX
Custom List	CL	Document	DC
Document Type	DT	Document Folder	DF
Automation Host	AH	Build	BL
Release/Iteration	RL	Component	CP

In addition, certain artifacts in the system are displayed with an icon that helps distinguish them from each other, and provides additional context on the state of the artifact:

Icon	Artifact Description
	Summary Requirement
	Detailed Requirement
	Use Case Requirement
	Use Case Scenario Step
	Test Folder
	Test Case with Test Steps
	Test Case without Test Steps
	Test Set
	Test Run
	Test Step
	Linked Test Case
	Release

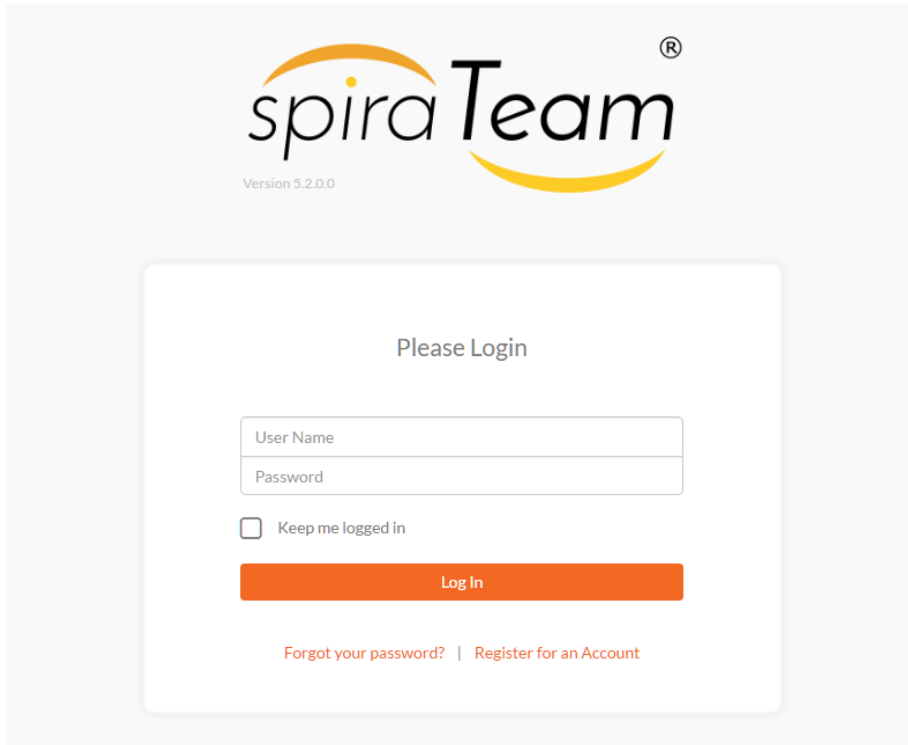
	Iteration / Sprint
	Component
	Task
	Incident
	Source Code Revision
	Project Resource
	Test Automation Host
	Build
	Artifact has an Attachment

### 3. User/Project Management

This section outlines how you can log into SpiraTeam®, view your personalized home-page that lists the key tasks that you need to focus on, and drill-down into each of your assigned projects in a single dashboard view. In addition to your personal homepage, each of your projects has its own dashboard that depicts the overall project health and status in a single comprehensive view.

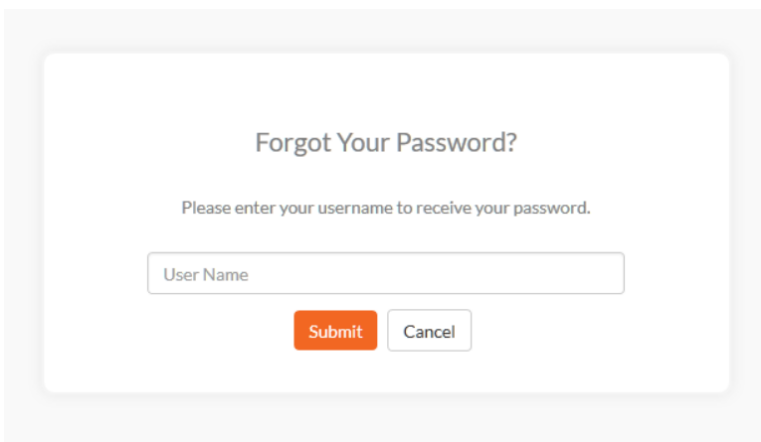
#### 3.1. Login Screen

Upon entering the SpiraTeam® URL provided by your system administrator into your browser, you will see the following login screen:



You need to enter your given user-name and password into the system in the appropriate boxes then click the [Log In](#) button to gain access to the application. Normally you only remain logged in to the application whilst in active use, and you will be asked to log-in again after either closing the browser or 20 minutes of inactivity. To prevent this, and to stay logged-in to SpiraTeam® regardless of browser window closing or inactivity, select the “Keep me logged in” check-box before clicking the [Log In](#) button. Note that this setting is specific to each individual computer you are logging-in from, and that it will be reset when you explicitly log-out with the log-out link (described in more detail in section 3.3).

If for any reason you are unable to login with the provided username/password combination, and error message will be displayed. If you cannot remember the correct log-in information, click on the “Forgot your password” link and your password will be emailed to the email address currently on file. The reset password screen is illustrated below:



Forgot Your Password?

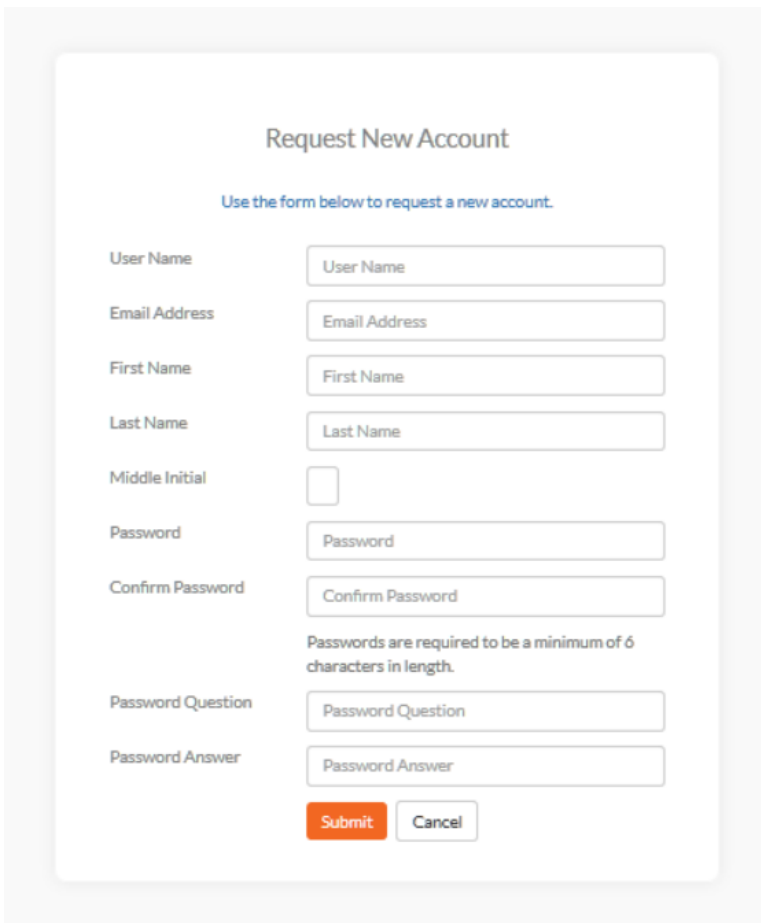
Please enter your username to receive your password.

User Name

Submit Cancel

This is a screenshot of a web form titled "Forgot Your Password?". The form is centered on a light gray background. It contains a single text input field labeled "User Name". Below the input field are two buttons: "Submit" (orange) and "Cancel" (white with gray border).

If you don't have a SpiraTeam® account setup, clicking on the "Register for an account?" link will take you to a form that you need to fill-in, which will be forwarded to the system administrator, who will need to approve your account before it is active in the system. This screen is illustrated below:



Request New Account

Use the form below to request a new account.

User Name

Email Address

First Name

Last Name

Middle Initial

Password

Confirm Password

Password Question

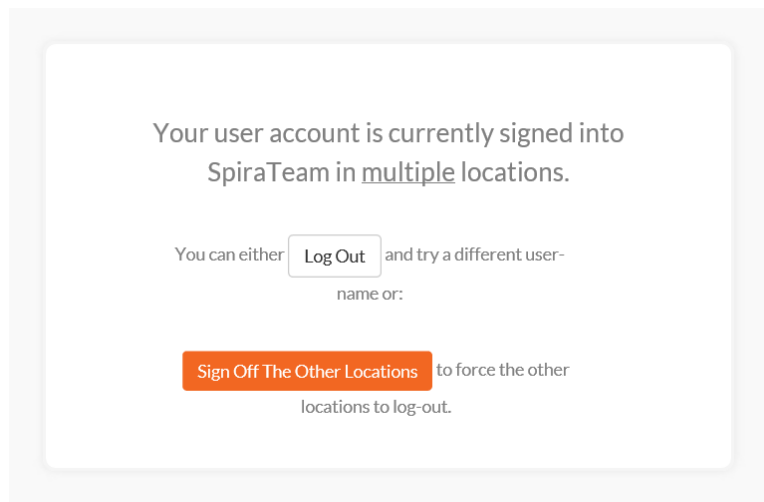
Password Answer

Submit Cancel

Passwords are required to be a minimum of 6 characters in length.

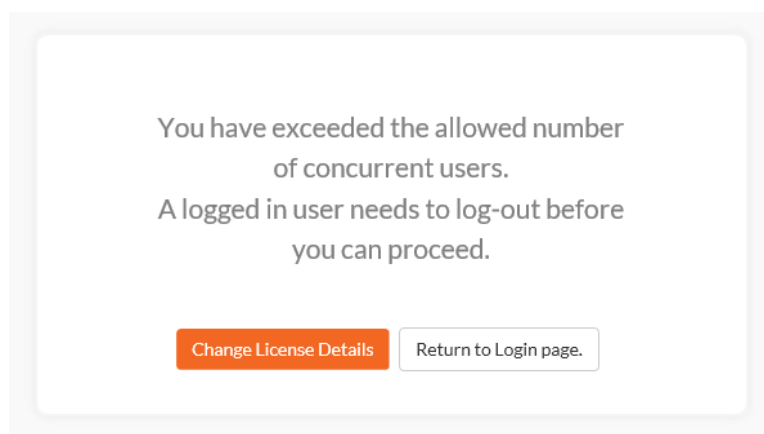
This is a screenshot of a web form titled "Request New Account". The form is centered on a light gray background. It contains several text input fields: "User Name", "Email Address", "First Name", "Last Name", "Middle Initial" (a small square input), "Password", "Confirm Password", "Password Question", and "Password Answer". Below the "Confirm Password" field is a note: "Passwords are required to be a minimum of 6 characters in length." At the bottom of the form are two buttons: "Submit" (orange) and "Cancel" (white with gray border).

In addition, the system will prevent you logging on to the system with the same username *at the same time* on multiple computers. This is to avoid the system getting confused by a user trying to make contradictory actions at the same time. If for any reason you do try and log in to the system when you already have an active session in progress, you will see the following screen:



You have two choices: you can either click the “Log Out” link and try logging in as a different user, or if you want to log-off any other active sessions (e.g. you closed the browser and the session is still listed as active), simply click the “Sign Off The Other Locations” link, and you will be logged in to the application.

Since SpiraTeam® is licensed to organizations for a specific number of concurrent users – unless they have purchased an unlimited Enterprise license – only a fixed number of users may be active at the same time. So, for example if an organization has a five (5) concurrent user license and a sixth user tries to log-in, they will be presented with the following screen:

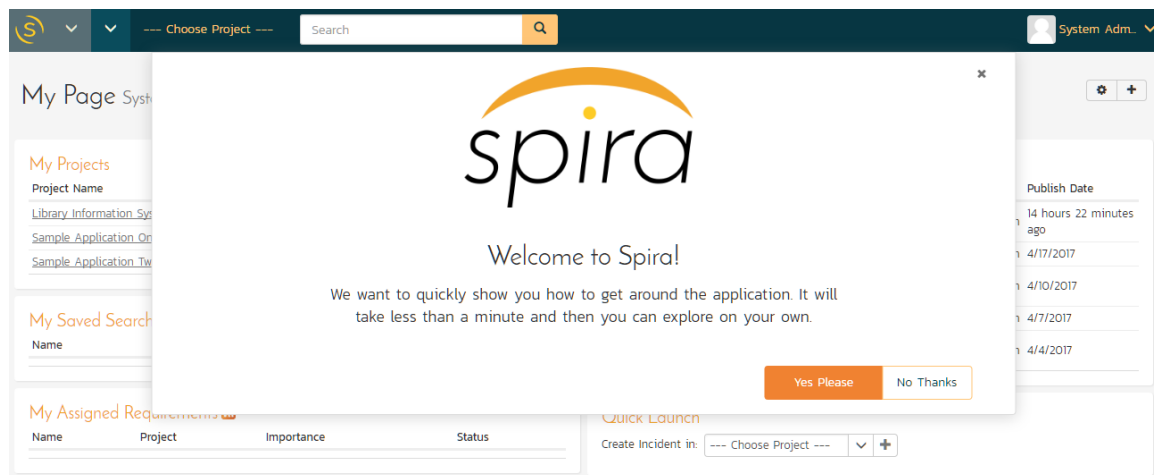




This means that one of the other users who is already logged-in, needs to click the “Log Out” button so that one of the concurrent licenses is freed for your use. If the user has logged out by closing the browser, the system may not have detected the logout. In this case, the other user needs to log back in, and then click the “Log Out” link.

### 3.2. My Page

Once you have successfully logged in, you will initially be taken to your personalized home page called “My Page”. Please note, that the very first time you log in you will be asked if you want to take a quick orientation tour of the application (which will look similar to the screenshot below).



**My Projects**

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Two	External Projects	30-Nov-2005

**My News Feeds**

Headline	Author	Publish Date
Rapise v5.1 - Scriptless Automated Testing	webmaster@inflectra.com	4/18/2017
Google for Developers: Pros and Cons of Google's S	webmaster@inflectra.com	4/18/2017
Office365: Pros and Cons of Microsoft's Excel API	webmaster@inflectra.com	4/17/2017
Preview of SpiraTest v5.2 - Revamped User Interfac	webmaster@inflectra.com	4/10/2017
It's Official - East Coast User Summit is On!	webmaster@inflectra.com	4/7/2017

**My Saved Searches**

Name	Project	Actions
Critical Not-Covered Requirements	Library Information System	Delete RSS
Failed Active Test Cases	Library Information System	Delete RSS
All Reopened Incidents	Library Information System	Delete RSS
New Unassigned Incidents	Library Information System	Delete RSS
High Priority Late Tasks	Library Information System	Delete RSS
Not Executed Test Sets	Library Information System	Delete RSS

**My Assigned Requirements**

Name	Project	Importance	Status
Ability to create different editions	Library Information ...	1 - Critical	In Progress
Ability to edit existing authors in the ...	Library Information ...	2 - High	Planned
Ability to link authors to their contact...	Library Information ...	2 - High	Planned
Ability to delete existing authors in th...	Library Information ...	2 - High	In Progress
Ability to create new users in the syste...	Library Information ...	3 - Medium	Requested

**My Assigned Incidents**

Name	Project	Type	Priority	Date Opened
Ability to associate multiple authors	Library Information ...	Enhancement	1 - Critical	16-Nov-2003
Test System Limitation	Library Information ...	Limitation	1 - Critical	3-Dec-2003
Test Training Item	Library Information ...	Training	1 - Critical	2-Dec-2003

Note that once you have successfully logged-in and chosen a project, SpiraTeam® remembers this selection, and on subsequent log-ins will automatically select that project, and highlight it for you in the “My Projects” list (see 3.2.1 below).

Your homepage contains all the information relevant to you—consolidated onto a single page for you to take immediate action. By default the page lists the information for all projects that you are a member of. However, you can choose to filter by the current project, to get a more focused list.

Next to some of the widgets is an RSS icon (📡), this allows you to subscribe to the information as a Really Simple Syndication (RSS) newsfeed. This can be useful if you want to be notified about recently assigned items without having to setup email notifications or being logged into SpiraTeam continuously. If you don't see an RSS icon next to the widgets on your My Page it means that you have not enabled RSS newsfeeds in your profile. For more details on configuring your RSS preferences, please refer to section 3.6 (My Profile).

Initially the page is loaded in ‘view mode’ which means that the various ‘widgets’ on the page are displayed with minimum visual clutter (no toolbars or control icons) that makes it easy to scan the items on the page and see what work has been assigned. To switch the page to ‘edit mode’, click on the button with the cog icon (⚙️) on the right:

In this mode, each of the 'widgets' displayed on the page can be minimized by clicking on the arrow icon (▼) in the top-left of the window, or closed by clicking-on the cross icon (✕) in the top-right of the window. This allows you to customize your page to reflect the types of information that are relevant. If you have closed a widget that you subsequently decide you want to reopen, you can add them back to the page display by clicking the "Add Items" button at the top of the page. In addition, the various widgets have a "settings" icon (⚙️) that allows you to customize how that widget appears. The settings are specific to each widget and in general allow you to specify how many rows of data are displayed and what columns are displayed.

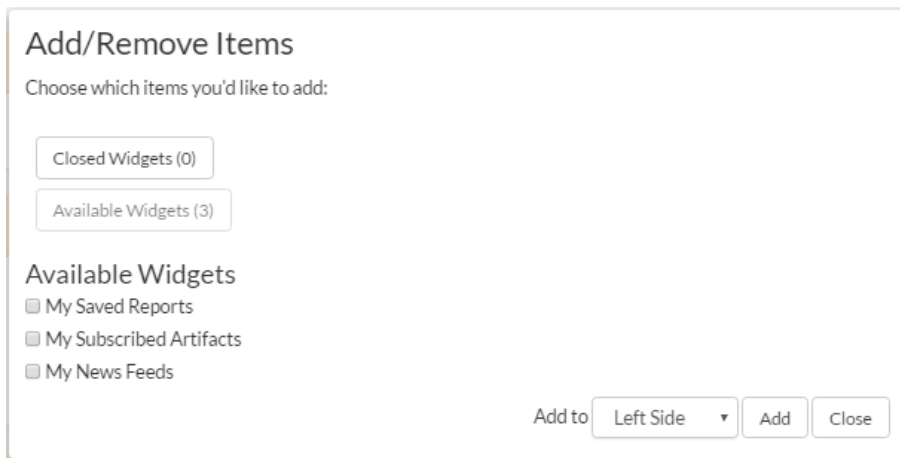
You can move and reposition the various widgets on the dashboard by clicking the mouse on the title bar of the widget you want to move and dragging it to the desired location. This change will be remembered when you next login to the system. Once you have the dashboard configured the way you like it, you can click "Return to Normal View" to switch back to 'view mode'.

When you load your 'My Page' for the first time it will consist of the following main elements:

- My Projects
- My Saved Searches
- My Assigned Requirements
- My Assigned Test Cases

- My Assigned Test Sets
- My Pending Test Runs
- My Assigned Incidents
- My Detected Incidents
- My Assigned Tasks
- Quick Launch
- My Contacts

However these are not the only widgets available. If you click on the “Add/Remove” items hyperlink it will display the list of any additional widgets that are available:



You can add the additional widgets by selecting the appropriate checkbox, choosing the destination location (left side vs. right side) and then click the [Add] button. The additional widgets available in the My Page are:

- My Saved Reports
- My Subscribed Artifacts
- My News Feeds

### 3.2.1. My Projects

This section lists all the projects you have been given access to, together with the name, description, project group and date of creation. To view the description of the project, simply position the mouse pointer over the link, and a tooltip window will popup containing the description.

When you initially view the page, all of the projects will be shown as links. When you click on a project to view, you will be taken to that project's home-page, and that project will be set as the current project. That project will now appear highlighted in your home-page (see above screen-shot). To change the currently selected project, simply click on the link of another project name. You can always change your current project by clicking on the drop-down-list of projects displayed on the global navigation bar to the right of the "Search" box.

If you are a project group member, the name of the project group will also be displayed as a hyperlink. In which case, clicking on the project group hyperlink will take you to the Project Group dashboard (see section 3.5).

### **3.2.2. My Saved Searches**

This section lists any filters/searches you have saved from the various artifact list screens throughout the application. This allows you to store specific combinations of searches that you need to perform on a regular basis (e.g. display all newly logged incidents, display all requirements that are completed but have no test coverage).

The name of the saved search is displayed along with an icon that depicts which artifact it's for and the project it refers to. Clicking on the name of the saved search will take you to the appropriate screen in the project and set the search parameters accordingly. Clicking the "Delete" button next to the saved search will delete it. Clicking on the RSS icon will allow you to subscribe to the specific search so that it will be displayed in your RSS newsreader. This allows you to setup customized lists of information that can be displayed outside of SpiraTeam.

### **3.2.3. My Assigned Requirements**

This section lists all the requirements you have been made owner of, across *all the different projects* you are a member of. This typically means that the project manager has assigned you to be responsible for either developing the supporting test cases or decomposing the requirement into its detailed work breakdown structure of project tasks. The requirement name is displayed, along with its status (requested, accepted, in-progress, etc.) and its importance.

### **3.2.4. My Assigned Test Cases**

This section lists all the test cases you have been made owner of, across *all the different projects* you are a member of. This typically means that the project manager has assigned you to be responsible for executing the assigned test scripts. To aid in this process, the script name is displayed, along with its last execution status (failed, passed or not-run) and date of last execution. This enables you to see how recently the tests have been run, and whether they need to be re-run.

If you click on the test-name hyperlink, you will be taken to the details page for this test-case (see section 5.2) and the project that the test-case belongs to will be made your current project. If you click on the play button to its right you will launch the test-case in the test-case execution module (see section 5.4) so that you can easily retest failed cases.

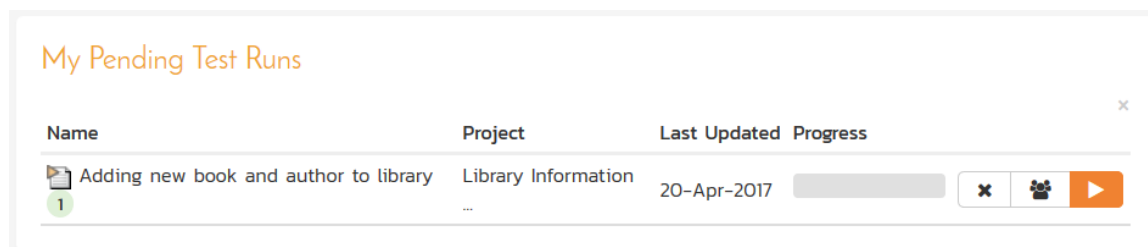
### 3.2.5. My Assigned Test Sets

This section lists all the test sets (groups of test cases) you have been made owner of, across *all the different projects* you are a member of. This typically means that the project manager has assigned you to be responsible for executing the test cases contained within the test set against a specified release of the system under test. To aid in this process, the test set name is displayed, along with its status, the project it belongs to, the number of remaining test cases to be executed, and the date by which all the tests need to have been run.

If you click on the test-set name hyperlink, you will be taken to the details page for this test-set (see section 5.6) and the project that the test-set belongs to will be made your current project. If you click on the play button to its right you will launch the test-cases contained within the test-set in the test-case execution module (see section 5.4) so that you can easily carry out your assigned testing task.

### 3.2.6. My Pending Test Runs

This section lists any test runs that you started executing in the test case module but haven't yet completed. Until a test case or test set is fully executed, a pending test run entry is stored in the system so that you can continue execution at a later date.



Any pending test run can be either deleted or resumed by clicking on the appropriate button. In addition, there is the option to reassign the test run to another user that is a member of the project.

### 3.2.7. My Assigned Tasks

This section lists all the project tasks that you have been made the owner of across *all the different projects* you are a member of. This typically means that the manager of the project in question has assigned development tasks to you that need to be completed so that a release can be completed and/or a requirement can be fulfilled. The tasks are listed in ascending date order so that the items with the

oldest due-dates are displayed first. In addition, each task is displayed with a progress indicator that graphically illustrates its completion against schedule. See section 8 – task management for details of the different progress indicators.

Clicking on the task name hyperlink will take you to the task details page. This page will describe the task in more detail, illustrate which requirement and release it is associated with, and also allow you to view the change log of actions that have been performed on it.

### **3.2.8. My Assigned Incidents**

This section lists all the open incidents you are the owner of, across *all the different projects* you are a member of. This typically means that the project manager has assigned you to be responsible for resolving the incident. In the case of a bug, this can mean actually fixing the problem, whereas for other incident types (e.g. training item) it may mean simply documenting a workaround. In either event, this section highlights the open incidents you need to manage, ranked by importance/priority and categorized by type, with the open date displayed to give you a sense of the age of the incident.

Clicking on the incident name hyperlink takes you to the incident details page (see section 6.2) that describes the incident in more detail, and allows you to add new information or change its status to indicate actions taken. In addition, if you position the mouse pointer over the name of the incident, a more detailed description is displayed as a “tooltip”.

### **3.2.9. My Detected Incidents**

This section lists all the open incidents that you have detected, across *all the different projects* you are a member of. These incidents are not necessarily ones that you need to take an active role in resolving, but since you were the originator – either by executing a test case or just logging a standalone incident – you can watch them to make sure that they are resolved in a timely manner.

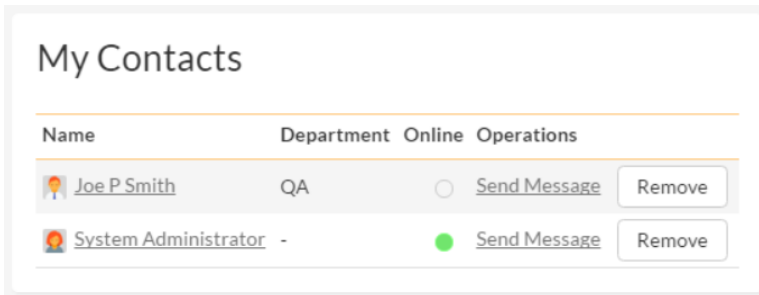
Clicking on the incident name hyperlink takes you to the incident details page (see section 6.2) that describes the incident in more detail, and allows you to add new information or change its status to indicate actions taken. In addition, if you position the mouse pointer over the name of the incident, a more detailed description is displayed as a “tooltip”.

### **3.2.10. Quick Launch**

This widget allows users to quickly record a new incident in any of the projects that they belong to. It's a shortcut that avoids having to first select a project, go to Tracking > Incidents and then click “New Incident”. Instead you simply choose the project from the dropdown list and click the arrow icon to bring up the new incident creation screen.

### 3.2.11. My Contacts

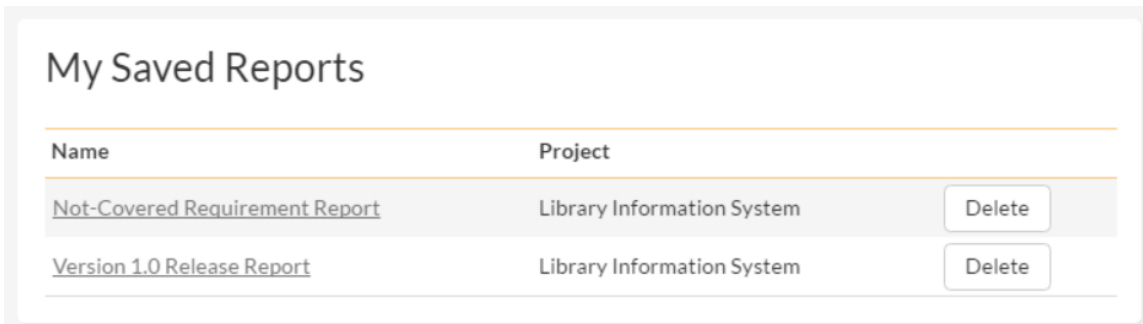
This widget displays a list of any other users in the system that you have listed as a personal contact:



Each user is displayed along with their graphical avatar, department and a colored indicator that lets you know if they are online or not. If they are online you can then send them an instant message (which will be described later in section 3.3. To remove an existing contact, just click on the 'Remove' button. To add a new user, simply locate them in the Tracking > Resources page and then use the <Add As Contact> button.

### 3.2.12. My Saved Reports

This section lists any reports you have saved from the reports center. This allows you to store specific combinations of report elements, format, filters and sorts (see the section on Reporting for more details on how to configure a report) for reports that you need to run on a regular basis:






### 3.2.13. My Subscribed Artifacts

This widget displays a list of all the artifacts in the system that you have subscribed to (by clicking on the Subscribe icon on the item). You can display the item by simply clicking on the hyperlink. In addition, if changes are made to any of the artifacts an email notification will be sent to you. You can click on the "Unsubscribe" button to remove the item from this list.








### My Subscribed Artifacts

Name	Project	Last Updated	
 <a href="#">Ability to add new books to the system</a>	Library Information ...	1-Dec-2003	> <input type="button" value="Unsubscribe"/>
 <a href="#">Ability to create new book</a>	Library Information ...	1-Dec-2003	> <input type="button" value="Unsubscribe"/>
 <a href="#">Cannot install system on Oracle 9i</a>	Library Information ...	1-Dec-2003	> <input type="button" value="Unsubscribe"/>

### 3.2.14. My News Feeds

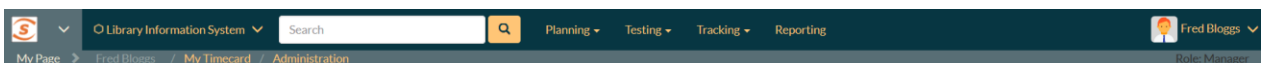
This widget allows you to subscribe to an external newsfeed and have the results be displayed inside SpiraTeam. By default it will be set to the newsfeed from the Inflectra website that displays a list of recent company and product announcements. You can add multiple instances of the widget to the dashboard, allowing you to read multiple news sources at once. Typical uses for this widget are to add news from project management and testing news sites/blogs or to add information from other tools in your organization that can display their data in RSS format.

### My News Feeds

Headline	Author	Publish Date
<a href="#">Inflectra to Sponsor the First Annual Test Leaders</a> 	webmaster@inflectra.com	3/29/2016
<a href="#">What to Do When Your Testers Are Addicted to Word</a> 	webmaster@inflectra.com	3/25/2016
<a href="#">Tips and Tricks Using Rapise</a> 	webmaster@inflectra.com	3/22/2016
<a href="#">First Alpha Release of SpiraTeam v5</a> 	webmaster@inflectra.com	3/16/2016
<a href="#">SmarteSoft and Inflectra Partner to Optimize QA an</a> 	webmaster@inflectra.com	3/9/2016

### 3.3. Global Navigation

Regardless of the page you are on, SpiraTeam® will always display the global navigation bar, consisting of the SpiraTeam® icon, the current Project Group or Project, the main artifact sections (Planning, Testing, Tracking and Reporting) that correspond to the main activities that take place in the system, the global search bar, and the user profile avatar menu.



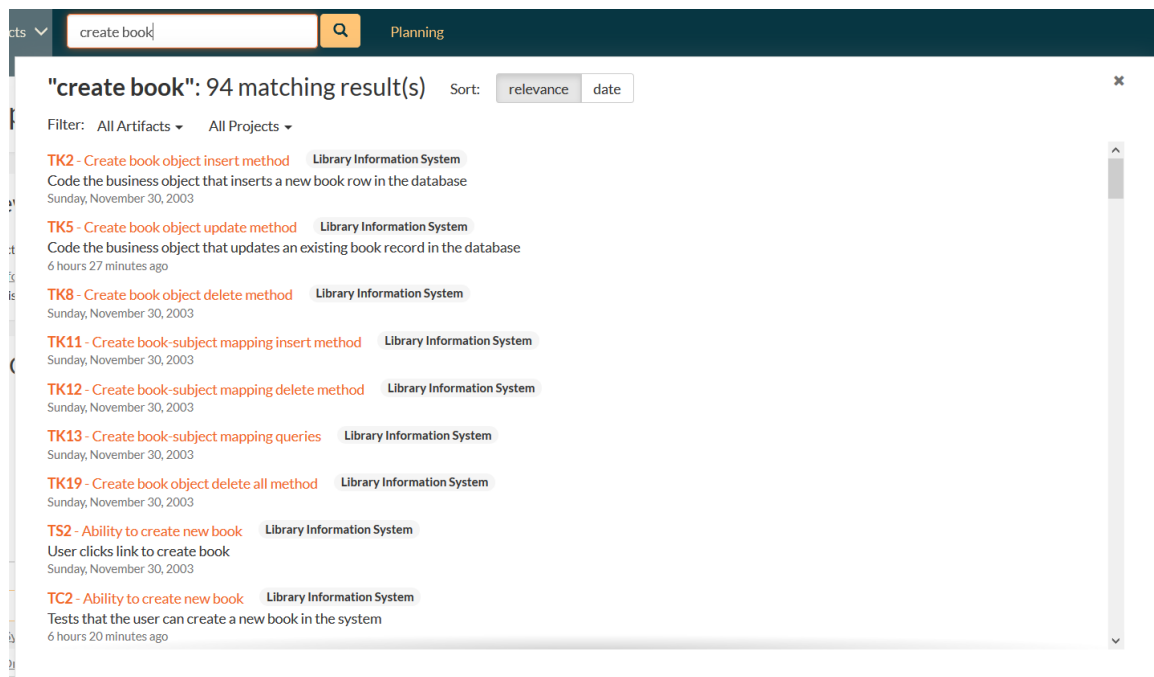
Under the various icons and headings are several secondary menu options that are displayed when you click the dropdown arrow to the right of the heading (as illustrated below):

- ▶ SpiraTeam Icon
  - ▷ My Page (described above)
  - ▷ My Timecard (described in Section 3.7)
  - ▷ Administration (described in the separate *SpiraTeam Administration Guide*)
- ▶ **Project Group Home Page** (described in Section 3.5)
  - ▷ Planning (described in Section 13)
- ▶ **Project Home Page** (described in Section 3.4)
- ▶ Planning
  - ▷ Requirements (described in Section 4)
  - ▷ Planning Board (described in Section 13)
  - ▷ Releases (described in Section 7)
  - ▷ Documents (described in Section 10)
- ▶ Testing
  - ▷ Test Cases (described in Section 5)
  - ▷ Test Sets (described in Section 5.7)
  - ▷ Test Runs (described in Section 5.5)
  - ▷ Automation Hosts (described in Section 5.9)
- ▶ Tracking
  - ▷ Incidents (described in Section 6)
  - ▷ Tasks (described in Section 8)
  - ▷ Resources (described in Section 9)
  - ▷ Source Code (described in Section 12)
- ▶ **Reporting** (described in section 11)
- ▶ User Profile Icon
  - ▷ My Profile (described in Section 3.6)
  - ▷ Log Out (described in Section 3.3.2)
  - ▷ Help? (described in Section 3.3.3)

Note: The main section headings will take you to the appropriate artifact type (requirement, test case, incident, etc.) for the currently selected project.

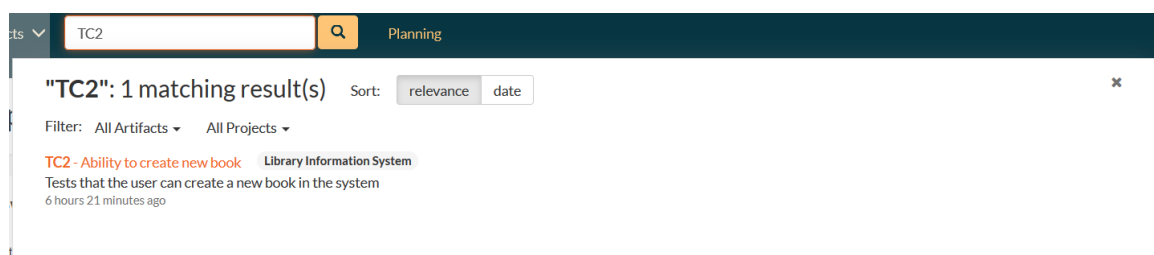
### 3.3.1. Global Search

SpiraTeam includes a global search bar that can be used to search across project and artifact type for items that include the entered keywords in either the name or description field:

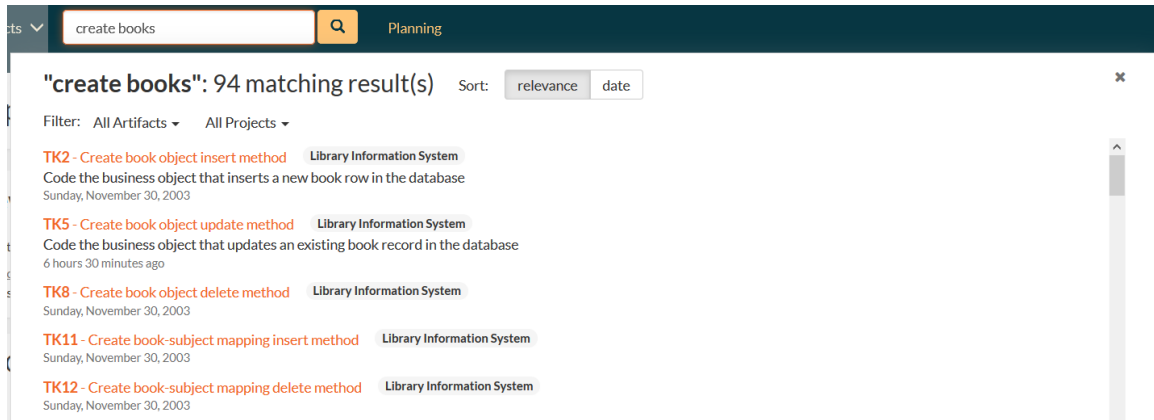


You can search for individual keywords by simply entering them in the search box and clicking the arrow button on the right. You can search for phrases by enclosing the words in double quotes. You can also **search for a specific artifact** by its unique **two-letter prefix and ID number**.

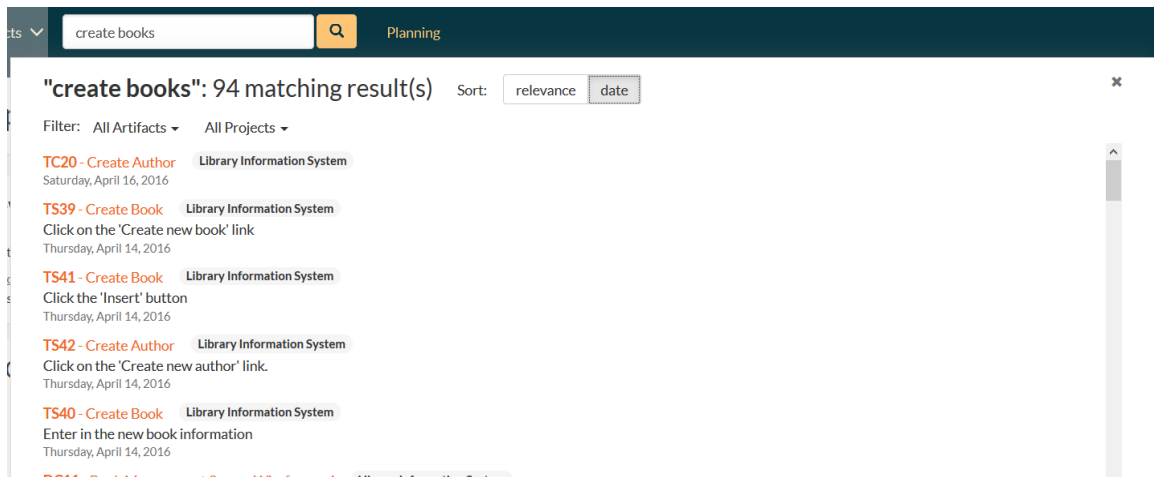
For example, searching on **book name** will find any artifacts that include either of the two words book and name in the name or description. Searching on **"book name"** will only return items that have that exact phrase in either the name or description. Searching on **TC2** will display just the Test Case with ID=2:



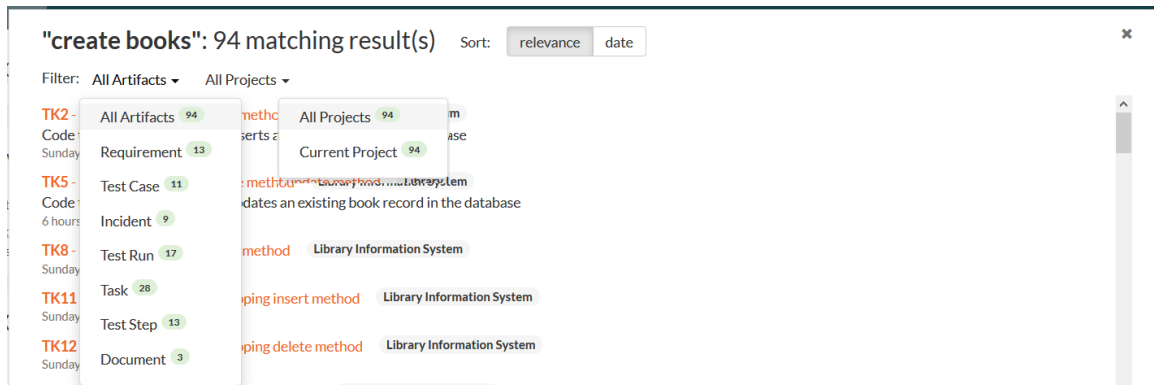
When you get a list of search results, you can choose to order by relevance (the default) or by most recent. Searching by relevance finds the artifacts that have the greatest match with the keywords:



The search by date is useful when you want to find recent items that match the search keywords:



In addition, you can filter the results by artifact type and/or project to narrow down the search:



For example, if you filter by requirement, the list of results will be narrowed accordingly:

"create books": 94 matching result(s) Sort: relevance date

Filter: Requirement All Projects

**RQ30 - Creating a new book in the system** Library Information System  
This use case defines the steps in creating a new book.  
Tuesday, December 2, 2003

**RQ12 - Ability to create different editions** Library Information System  
This was requested to allow the disposal via charity of legacy editions to ensure out-of date material is removed  
Sunday, November 30, 2003

**RQ26 - Ability to create new users in the system** Library Information System  
Sunday, November 30, 2003

**RQ32 - Deleting an existing book from the system** Library Information System  
This use case defines the steps when deleting a book record.  
Thursday, December 4, 2003

**RQ31 - Editing an existing book in the system** Library Information System  
This use case defines the steps in editing an existing book record.  
Wednesday, December 3, 2003

**RQ3 - Book Management** Library Information System

### 3.3.2. Log Out

Clicking on the “Log Out” link will immediately log you out of your current session and return you to the login page illustrated in section 3.1. If you had set the “Keep Me Logged In” option during your previous login, that setting will be reset; so if you want to avoid having to keep logging-in, you’ll need to re-check that box during your next log-in.

### 3.3.3. Help

Clicking on this link on any page will bring up the online version of this manual shown below:

Contents Index

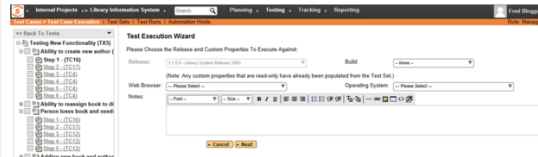
- 1. Introduction
- 2. Functionality Overview
- 3. User/Project Management
- 4. Requirements Management
- 5. Test Case Management
  - 5.1. Test Case List
    - 5.1.1. Insert
    - 5.1.2. Indent / Outdent
    - 5.1.3. Delete
    - 5.1.4. Execute
    - 5.1.5. Refresh
    - 5.1.6. Edit
    - 5.1.7. Show Level
    - 5.1.8. Show / Hide Columns
    - 5.1.9. Filtering
    - 5.1.10. Copying Test Cases
    - 5.1.11. Moving Test Cases
    - 5.1.12. Exporting Test Cases
    - 5.1.13. Adding Test Cases to a Release
    - 5.1.14. Viewing the Test Status for a Release
    - 5.1.15. Printing Items
    - 5.1.16. Right-Click Context Menu
  - 5.2. Test Case Details
    - 5.2.1. Overview - Details
      - 5.2.2.1. Insert Step
      - 5.2.2.2. Insert Link
      - 5.2.2.3. Delete
      - 5.2.2.4. Copy
      - 5.2.2.5. Refresh
      - 5.2.2.6. Show / Hide Columns
      - 5.2.2.7. Editing Test Steps
      - 5.2.2.8. Editing Test Links
      - 5.2.2.9. Moving Test Steps
      - 5.2.2.10. Parameters
    - 5.2.3. Overview - Automation
    - 5.2.4. Overview - Comments
    - 5.2.5. Requirements Coverage
    - 5.2.6. Test Runs
    - 5.2.7. Releases
    - 5.2.8. Incidents
    - 5.2.9. Attachments

### 5.4. Execute Test Case(s)

This section describes how a tester can follow the steps defined for a series of test cases and record what actually happened in the process. In addition, recorded failures of test cases can be used to automatically generate new incidents that will be added to the incident tracking module (see section 6).

You start test case execution in SpiraTeam by either selecting test cases or test sets on their respective page(s) and then clicking the <Execute> button, or by clicking the "Execute" link on the test cases / test sets listed on your personalized home page under "My Test Cases" or "My Test Sets". If you execute a test set then the values of the selected release and custom list properties for the test run are automatically populated from the test set, whereas if you directly execute a test case itself, those values can be chosen by the tester.

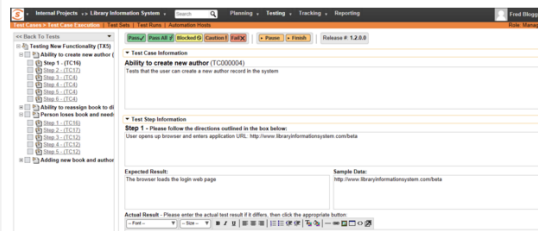
Regardless of the route taken to launch the test execution module, the first screen that will be displayed will look like the following:



Before actually executing the test scripts, you need to select the release (and optionally the specific build) of the system that you will be testing against and any test run custom properties that have been defined by the project owner. This ensures that the resulting test runs and incidents are associated with the correct release of the system, and that the test runs are mapped to the appropriate custom properties (e.g. operating system, platform, browser, etc.).

If you have not configured any releases for the project, then the release drop-down list will be disabled and the test runs/incidents will not be associated with any particular release. If the test run was launched from a test set, the release and any list custom properties will be pre-populated from the test set itself and will not be changeable on this screen (unless they weren't set by the test set).

Once you have chosen the appropriate release name and/or custom properties, click the <Next> button to begin executing test steps:



(c) Inflectra Corporation 2006-2016

Clicking on any of the triangles expand links in the left hand table of contents will open up the detailed list of topics for each of the main areas of the system. In each area, clicking on one of the individual links will open the appropriate section in the help manual. By default, the reading-pane will open to the help item that is most closely related to the screen you happened to be on when you clicked the "Help" link.

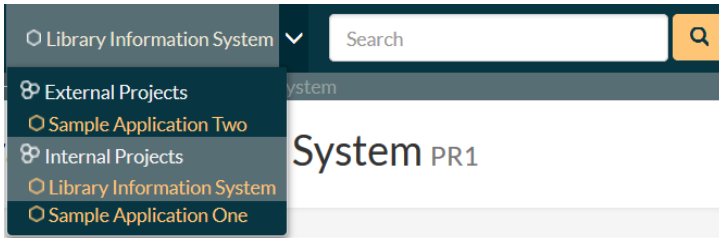
You can search the index by using the "Index" tab.

If you want to share a specific help page with a colleague in your organization, simply send them the url from the address bar.

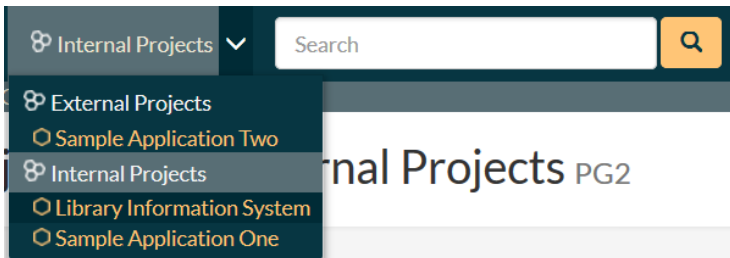
### 3.3.4. Choose Project or Project Group

Choosing a Project or Project Group from the list of your assigned projects in the drop-down-menu allows you to quickly and easily jump between projects regardless of the page you happen to be on. When you choose a project, you will be taken to the same page in the selected project (assuming that you have permissions to view that page). The projects are listed under the appropriate group.

You can use CTRL+click to open the new project in a separate browser tab:

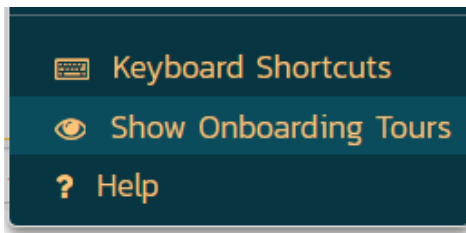


Similarly, you can choose a specific project group from the list of project groups, which will display the project group dashboard for the selected project group:

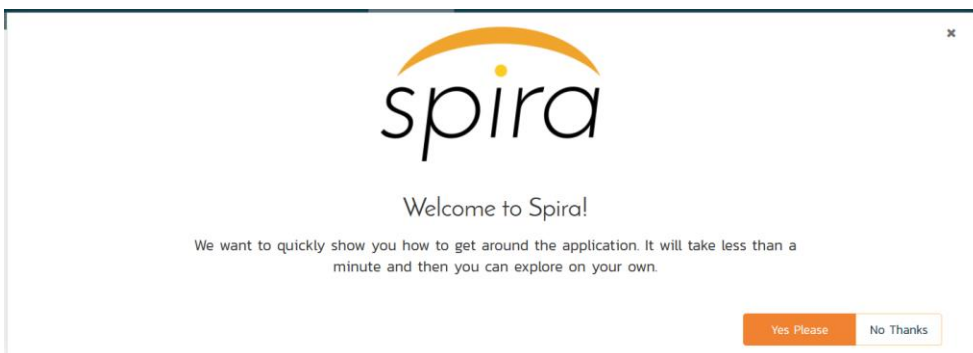


### 3.3.5. Show Onboarding Tours

When you first login to SpiraTeam, the system will show you a welcome page, together with a tour that walks you through the key features of the application. If you would like to see that again, you simply need to click on the “Show Onboarding Tours” option, under the user profile menu.



SpiraTeam will then display the **onboarding tour** main dialog again:



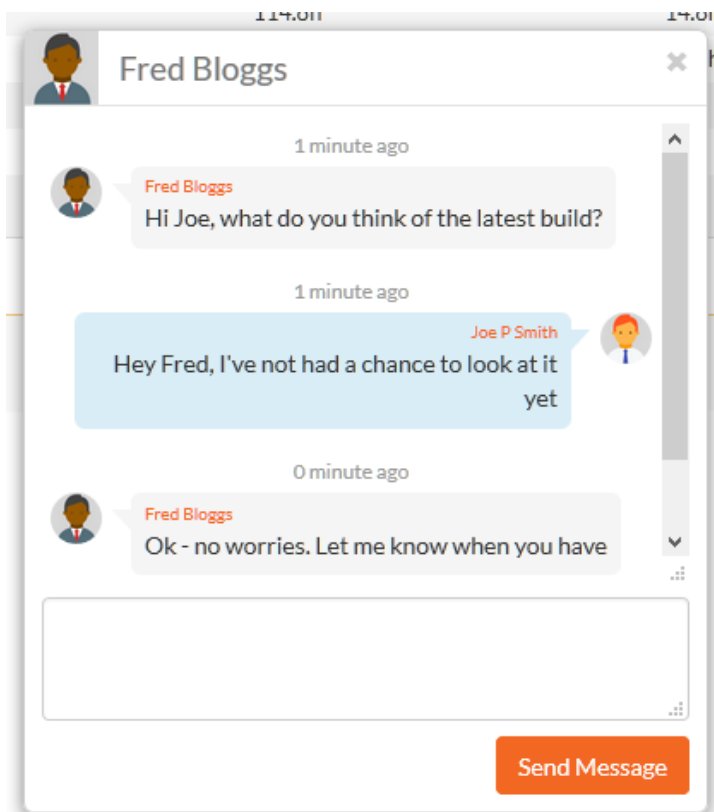
You can click ‘No Thanks’ to dismiss it, or ‘Yes Please’ to start the tour.

### 3.3.6. Instant Messenger

The Spira instant messenger is available in both SpiraPlan® and SpiraTeam® and allows you to send short messages instantaneously to other users in the system. You can see the status of other users by looking for the small green circle next to the list of users in the 'My Contacts' widget as well as the various user fields in the system:

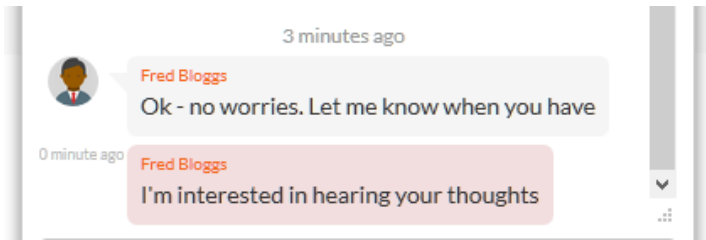


When a user is online and available to communicate with, the small circle will be filled-in green. If you click on the green circle, it will open up the instant messenger window for that user:



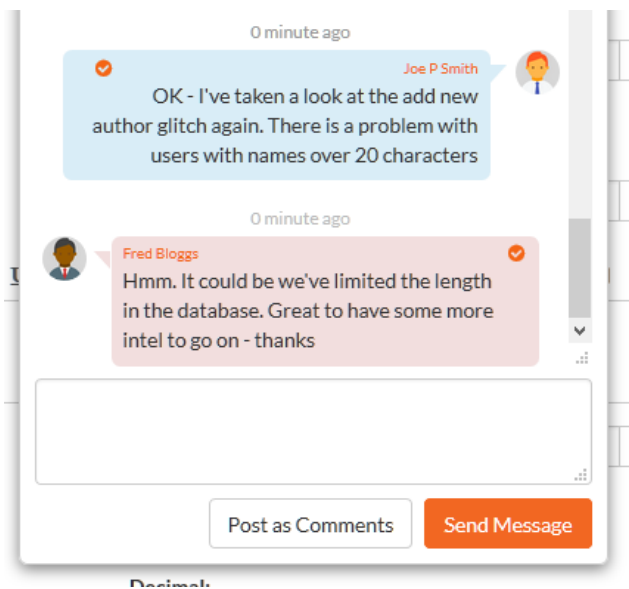
You can then enter in a message to the other user, which will then cause a conversation window to open inside their web browser with your message displayed. The other user can then enter in their responses, allowing the two users to have a real-time conversation:





To make it easier to see what's new, all unread messages are displayed in a message box with a darker shade. In addition, the user's avatar image is displayed at the start of each message group.

If the message window appears on a SpiraTeam® window that contains a specific artifact (e.g. a requirement, test case, task, etc.) there will be the option to 'Post as Comments'. If you click this option, any messages selected with a checkbox will be automatically posted to the current artifact as comments. This is useful if you have a conversation related to a specific item and you want to have the outcome permanently recorded as part of the audit trail. Otherwise, instant messages will be automatically purged from the system after 90 days.



### 3.4. Project Home

When you click on either the "Project Home" tab or the name of the project in the "My Page" project list, you will be taken to the homepage of the specific project in question:

# Library Information System PR1

Displaying: --- All Releases ---

General    Development    Testing

⚙️ + 🖼️

### Project Overview

Sample application that allows users to manage books, authors and lending records for a typical branch library

Group: [Internal Projects](#)  
Web Site: [www.libraryinformationssystem.org](http://www.libraryinformationssystem.org) ⓘ  
Owner(s): [System Administrator](#)

### Top Open Issues

[View All](#)

Description	Priority	Owned By	Date Opened
<a href="#">Cannot install system on Windows ME</a>			30-Nov-2003
<a href="#">Ability to be accessed by Mozilla</a>	2 - High	Joe P Smith	30-Nov-2003
<a href="#">System may require process changes</a>	3 - Medium		30-Nov-2003
<a href="#">Management of children's loans</a>	3 - Medium	Joe P Smith	30-Nov-2003

### Activity Stream

[View All](#)

- [Fred Bloggs](#) modified Incident [IN:7] - Cannot add a new book to the system  
Tuesday, May 2, 2006 12:34:00 PM
- [Fred Bloggs](#) modified Requirement [RQ:4] - Ability to add new books to the system  
Tuesday, May 2, 2006 11:01:00 AM
- [Fred Bloggs](#) modified Test Step [TS:3] - User clicks link to create author  
Tuesday, May 2, 2006 10:56:00 AM
- [Fred Bloggs](#) modified Release [RL:1] - Library System Release 1  
Tuesday, May 2, 2006 7:32:00 AM
- [Fred Bloggs](#) modified Test Case [TC:2] - Ability to create new book  
Tuesday, May 2, 2006 5:14:00 AM

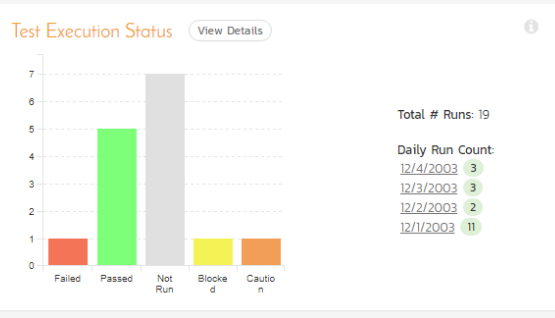
### Top Open Risks

[View All](#)

Description	Priority	Owned By	Date Opened
<a href="#">Sample Risk 1</a>	1 - Critical		9-Dec-2003
<a href="#">Sample Risk 2</a>	2 - High		9-Dec-2003
<a href="#">Sample Risk 3</a>	4 - Low	Fred Bloggs	9-Dec-2003

### Shared Searches

Name	Creator
<a href="#">Critical Not-Covered Requirements</a>	<a href="#">Fred Bloggs</a> ⓘ
<a href="#">High Priority Late Tasks</a>	<a href="#">Fred Bloggs</a> ⓘ



### Requirements Summary

[View Details](#)

Status	1 - Critical	2 - High	3 - Medium	4 - Low	(None)	TOTAL

This page summarizes all of the information regarding the project into a comprehensive, easily digestible form that provides a “one-stop-shop” for people interested in understanding the overall status of the project at a glance. It contains summary-level information for all types of artifact (requirements, test cases, incidents, etc.) that you can use to drill-down into the appropriate section of the application.

You will see a small “i” in a circle at the top right of every chart. Hovering or clicking on this will show you information about that chart.

In addition to viewing the project home page, you can choose to filter by a specific release, to get the homepage for just that release (and any child iterations).

Just like the ‘My Page’, the Project Home dashboard is initially loaded in ‘view mode’ with pre-configured set of widgets. The Project Home also offers 3 versions you can quickly switch between. While each of these can be customized as you want, by default they are designed to help different types of project member – be they managers, testers, or developers.

General    Development    Testing

⚙️ + 🖼️

To download an image of the entire dashboard click the ‘picture’ button beneath the currently selected view.

To switch the page to 'edit mode', you should click on the button with the cog icon (⚙️) below the currently selected Project Home view.

Once in 'edit mode', each of the 'widgets' displayed on the project homepage can be minimized by clicking on the arrow icon (▼) in the top-left of the window, or closed by clicking-on the cross icon (✕) in the top-right of the window. In addition, the widgets allow you change their settings by clicking on the settings icon (⚙️). This allows you to customize your view of the project to reflect the types of information that are relevant to you. If you have closed a widget that you subsequently decide you want to reopen, you can rectify by clicking the ***Add Items*** button at the top of the page, and locating the closed item from the list of 'Closed Widgets'.

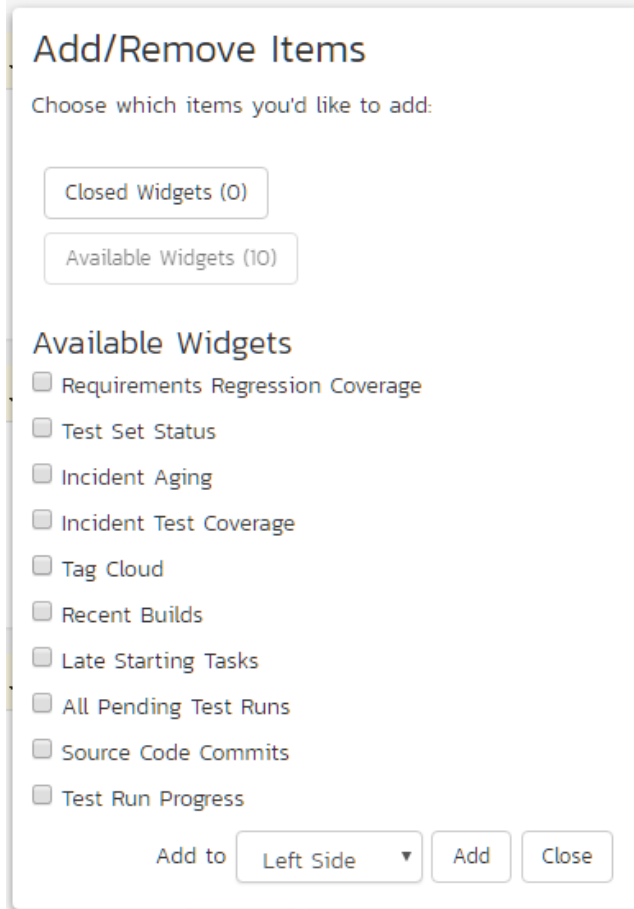
When you load your 'Project Home' for the first time it will default to the "General" view. The following table shows which widgets are displayed on the different views of the 'Project Home':

Widget Name	General	Development	Testing
Project Overview	Y	Y	Y
Activity Stream	Y	Y	Y
Shared Searches	Y		
Requirements Summary	Y	Y	Y
Requirements Coverage	Y		Y
Release Task Progress	Y	Y	
Requirements Graphs	Y	Y	
Late Finishing Tasks	Y	Y	
Task Graphs	Y	Y	
Top Open Issues	Y	Y	
Top Open Risks	Y		
Test Execution Status	Y		Y
Release Test Summary	Y		Y
Incident Summary	Y	Y	Y
Incident Open Count	Y	Y	Y

Requirement Incident Count	Y	Y	Y
Requirements Regression Coverage			Y
Test Set Status			Y
Incident Aging		Y	
Incident Test Coverage			
Tag Cloud			
Recent Builds		Y	
Late Starting Tasks		Y	
All Pending Test Runs			Y
Source Code Commits		Y	
Test Run Progress			Y
Test Case Progress By Day			Y

Please note that different widgets are shown by default for the “Developer” and for the “Tester” views.

If you click on the “[+ Add](#)” items button it will display the list of any additional widgets that are available for that view. Below is what this looks like for the ‘General’ view:



You can add the additional widgets by selecting the appropriate checkbox, choosing the destination location (left side vs. right side) and then click the “[Add](#)” button.

Each of the different widgets listed is described in more detail below:

### 3.4.1. Project Overview

This section displays the name of the project, together with a brief description, the web-site that points to any additional information about the project, and the names of the owners of the project.

### 3.4.2. Shared Searches

This section lists any filters/searches have been saved from the various artifact list screens throughout the application and marked as **shared filters**. This allows users to store specific combinations of searches that the project team needs to perform on a regular basis (e.g. display all newly logged incidents, display all requirements that are completed but have no test coverage).

The name of the saved search is displayed along with an icon that depicts which artifact it's for and the person who created it. Clicking on the name of the saved search will take you to the appropriate screen in

the project and set the search parameters accordingly. If you are the creator of the saved search, clicking the “[Delete](#)” button next to the saved search will delete it. Clicking on the RSS icon will allow you to subscribe to the specific search so that it will be displayed in your RSS newsreader. This allows you to setup customized lists of information that can be displayed outside of SpiraTeam.

### 3.4.3. Requirements Summary

This section consists of a summary table that displays the aggregate count of requirements in the system broken-down by importance (on the x-axis) and status (on the y-axis). This allows the project manager to determine how many critical vs. low priority enhancements are waiting to be implemented, vs. actually being implemented. In addition, it makes a distinction between those requirements simply requested and those actually planned for implementation, so the project manager can see what the backlog is between the customer’s demands, and the plan in place. Clicking on the “[View Details](#)” button at the top of the table simply brings up a detail graph that you can customize by selecting the axes. Clicking on the individual values in the cells will display the requirements list with the filter set to match the importance and status of the value.

### 3.4.4. Requirements Coverage

This section consists of a bar graph that displays the aggregated count of requirements test coverage for the project. The Passed, Failed, Blocked, Caution and Not-Run bars indicate the total count of requirements that have tests covering them, allocated across the execution status of the covering tests. For example, if a requirement is covered by *four tests*, two that have passed, one that has failed and one that has not yet been run, the counts would be passed = 0.5, failed = 0.25 and not-run 0.25. These fractional quantities are then summed across all the requirements to give the execution status breakdown of the covered requirements.

In addition to the five statuses for the covered requirements, the sixth (“Not Covered”) bar depicts the total number of requirements that have no tests covering them, putting the five other bars into perspective. Typically a project is in good health if the “Not Covered” bar is zero, and the count of “Passed” requirements is greater than “Failed”, “Caution” or “Not Run”. The greatest risk lies with the “Blocked”, “Not Covered” and “Not Run” status codes, since the severity/quantity of any bugs lurking within is not yet fully known.

If you position the mouse pointer over any of the four bars, the color of the bar changes slightly and the underlying raw data is displayed as a tooltip, together with the percentage equivalent. Clicking on the any of the bars in the chart will take you to the requirements list page (see section 4.1) with the corresponding filters set.

When you filter the project home by release/iteration, this widget will filter the requirements coverage graph to only include **requirements that are specifically mapped to the selected release/iteration**. This is useful when you want to determine the test coverage of new requirements that are being added to the specific release/iteration. If instead you want to determine the regression test coverage for a release, you should add the separate “Requirements Regression Coverage” widget to the page instead.

#### **3.4.5. Requirement Incident Count**

This section displays a count of the total number of incidents, and the number of open incidents mapped against requirements in the system, sorted by the requirements that have the most open incidents first. This section is useful for determining the parts of the application that have the most instability, as you can look at the requirements that have yielded the greatest number of incidents. Clicking on any of the requirements hyperlinks will take you to the detail page for the requirement in question (see section 4.2). *You can configure in the settings whether to include requirements with no open incidents, and also how many rows of data to display.*

#### **3.4.6. Top Open Issues**

This section displays a breakdown of the top issues logged against the project, in order of decreasing priority. Note that items not given a priority are listed at the top, since critical issues could be lurking in that list, and the project manager will want to immediately review these to assign priorities. Clicking on the issue item hyperlink will take you to the incident details page for the issue in question (see section 6.2). *You can configure in the settings whether to use Priority or Severity for the display, and also how many rows of data to display.*

#### **3.4.7. Top Open Risks**

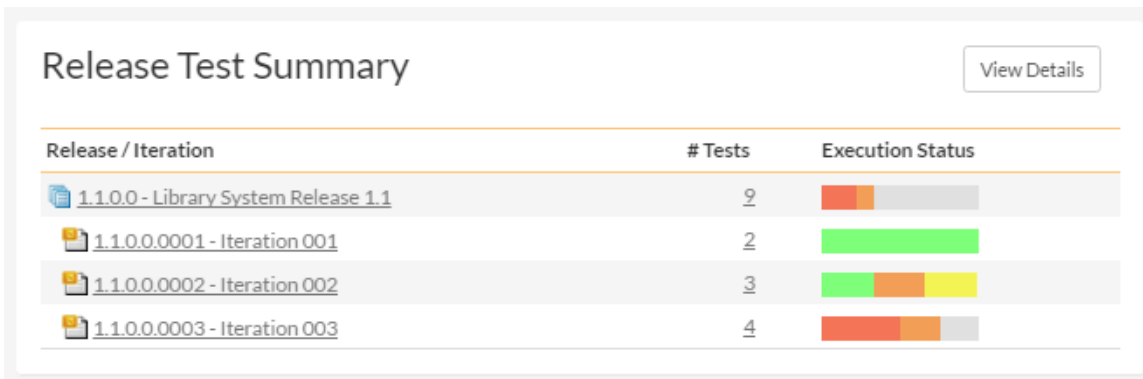
This section displays a breakdown of the top risks logged against the project, in order of decreasing priority. Note that items not given a priority are listed at the top, since critical risks could be lurking in that list, and the project manager will want to immediately review these to assign priorities. Clicking on the risk item hyperlink will take you to the incident details page for the risk in question (see section 6.2). *You can configure in the settings whether to use Priority or Severity for the display, and also how many rows of data to display.*

#### **3.4.8. Release Test Summary**

This widget allows you to quickly ascertain the test execution status of each of the active releases that make up the current project in one snapshot. Each release is displayed together with a graphical display that illustrates the execution status with different colored bars. In addition, if you hover the mouse over the graphical display it will display a tooltip that provides a more detailed description of the number of tests in each status.



Each release will display the aggregate status of any test cases directly assigned to itself, together with the test status of any child iterations that are contained within the Release. Clicking on one of the releases will drill you down one level further and display the test execution status for the parent release as well as each of the child iterations separately:



### 3.4.9. Incident Summary

This section consists of a summary table that displays the aggregate count of incidents in the system broken-down by priority (on the x-axis) and status (on the y-axis). This allow the project manager to determine how many critical vs. low priority incidents are waiting to be addressed, and how many new items need to be categorized and assigned. Clicking on the “View Details” link at the top of the table simply brings up a detail graph that you can customize by selecting the axes. Clicking on the individual values in the cells will display the incident list with the filter set to match the priority and status of the value.

By default this summary table displays the total count of all incidents – regardless of type, however my changing the drop-down list to a specific incident type (e.g. bug, enhancement, issue, etc.), the project



manager can filter the summary table to just items of that type. *You can also configure in the settings whether to use Priority or Severity for the x-axis*

### 3.4.10. Test Execution Status

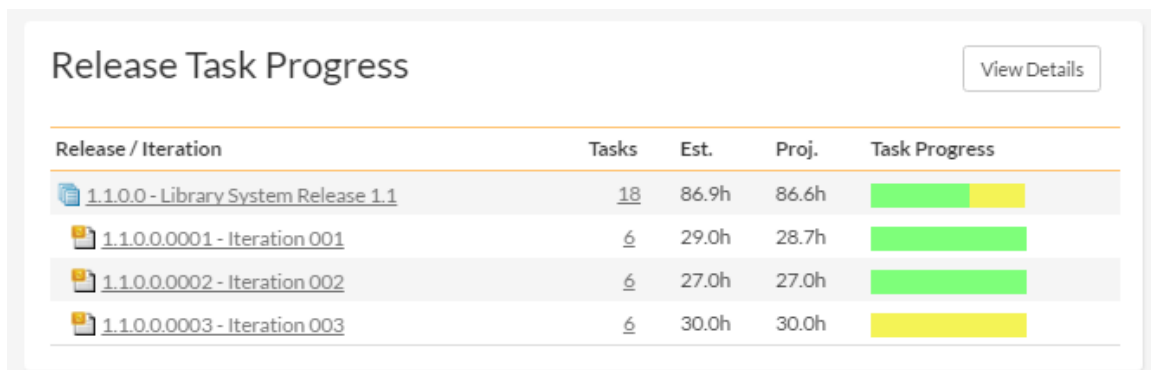
This section consists of a bar graph that displays the aggregated count of test cases in each execution status for the project. Note that this graph does not consider past test-runs when calculating the totals in each status (Passed, Failed, Not Run, etc.), it simply looks at each test-case and uses the last-run status as the best health indicator. Thus if a test case that previously passed, has subsequently failed upon re-execution, it will be considered a failure only.

If you position the mouse pointer over any of the five bars, the color of the bar changes slightly and the underlying raw data is displayed as a tooltip, together with the percentage equivalent. Clicking on any of the bars will bring up the project test case list (see section 5.1) with the appropriate filter applied.

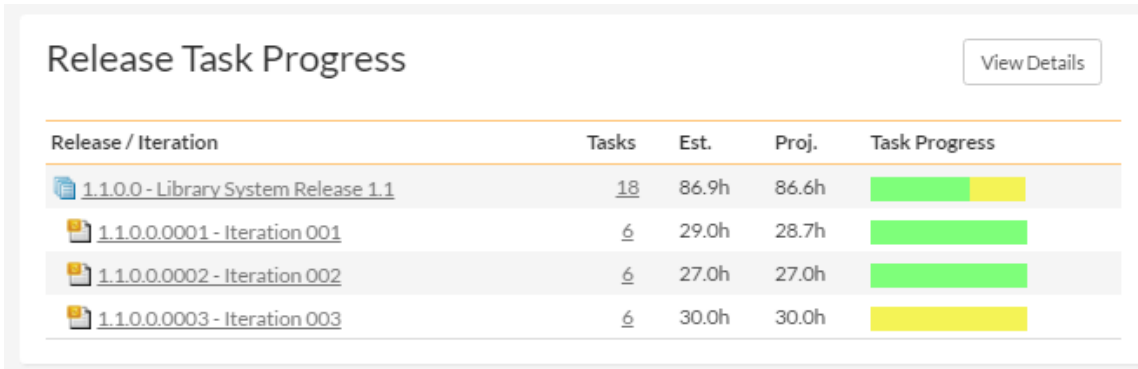
In addition to the bar-chart, there is also a display of the total number of test runs recorded for the project, and a list of the *five most recent* days of recorded test-runs, together with the daily count.

### 3.4.11. Release Task Progress

This widget allows you to quickly ascertain the task progress of each of the active releases that make up the current project in one snapshot. Each release is displayed together with a graphical display that illustrates the completion percentage and status with different colored bars. In addition, if you hover the mouse over the graphical display it will display a tooltip that provides a more detailed description of the number of tasks in each status.



Each release will display the aggregate progress of any tasks directly assigned to itself, together with the task progress of any child iterations that are contained within the Release. Clicking on one of the releases will drill you down one level further and display the task progress for the parent release as well as each of the child iterations separately:



#### 3.4.12. Late Finishing Tasks

This section displays the list of any project tasks that have not yet been completed, but whose scheduled end date has already elapsed. A graphical progress bar is included with each task in the grid, so that you can easily see which tasks are nearest completion.

#### 3.4.13. Late Starting Tasks

This section displays the list of any project tasks that have not yet started, but whose scheduled start date has already elapsed:

### Late Starting Tasks

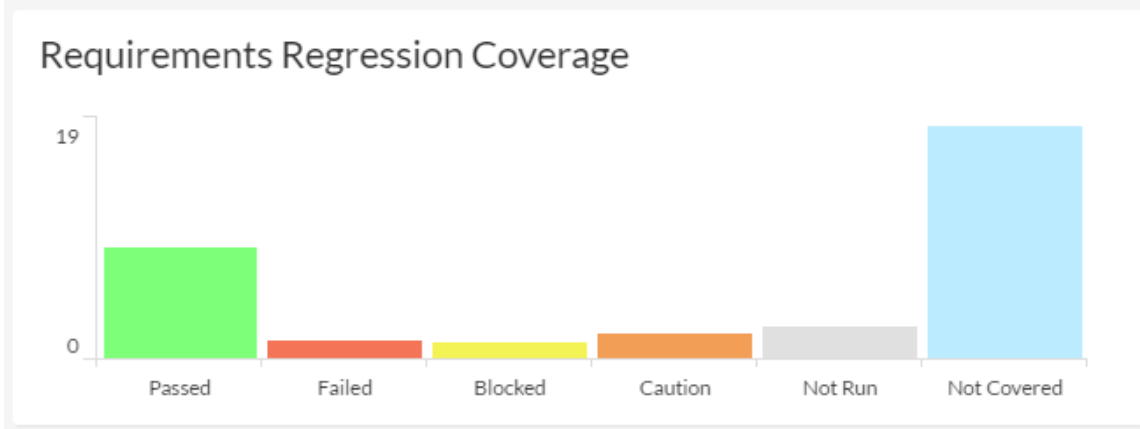
[View All](#)

Name	Owner	Priority	Start Date
<a href="#">Write edition object insert queries</a>	Fred Bloggs	1 - Critical	10-Mar-2004
<a href="#">Develop edit author details screen</a>	Joe P Smith	2 - High	6-Mar-2004
<a href="#">Create author object update method</a>	Joe P Smith	2 - High	6-Mar-2004
<a href="#">Write author object update queries</a>	Joe P Smith	2 - High	6-Mar-2004
<a href="#">Refactor author screen to include delete...</a>	Fred Bloggs	2 - High	8-Mar-2004

Each task is listed along with its owner, priority and due-date so that you quickly ascertain how many days late it will be starting, how important it is to the project, and who needs to be contacted to get more information.

#### 3.4.14. Requirements Regression Coverage

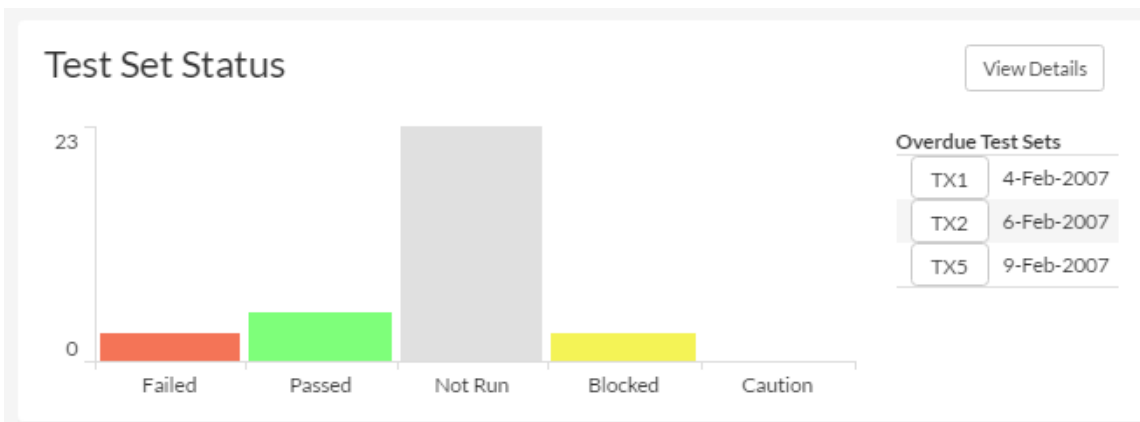
This section consists of a bar graph that displays the aggregated count of requirements test coverage for the project in a similar fashion to the 'Requirements Coverage' widget:



However, unlike the 'Requirements Coverage' widget, when you filter the project home by release/iteration, this widget will filter the requirements coverage graph to include all requirements (regardless of release/iteration), but only considering covering test cases that are associated with the selected release/iteration. This is useful when you want to determine the regression requirements test coverage of a specific release (i.e. does running all the tests relevant to this release cover all the necessary requirements, not just new requirements).

### 3.4.15. Test Set Status

This section consists of a bar graph that displays the aggregated count of test cases in each execution status for each test set in the project:



Therefore if you have the same test cases stored in multiple test sets, then this widget will display the total test case count for all combinations of test set. This is useful if you have the same test cases being executed in different environments – represented by different test sets – and you need to make sure that the tests passed successfully in all environments.

If you position the mouse pointer over any of the five bars, the color of the bar changes slightly and the underlying raw data is displayed as a tooltip, together with the percentage equivalent. Clicking on any of the bars brings up the project test set list (see section 5.6) page with the appropriate filter applied. In addition to the bar-chart, there is also a display of (up to) the *five most overdue test sets in the project*.

### 3.4.16. Incident Aging

This section displays the number of days incidents have been left open in the system. The chart is organized as a histogram, with the count of incidents on the y-axis and different age intervals on the x-axis.

### 3.4.17. Incident Test Coverage

This section displays a bar-graph that illustrates the execution status of any test cases that previously failed and resulted in the generation of an incident that has subsequently been resolved. This is very useful when a test case was executed in Release 1.0 and an incident was logged. That incident has now been resolved in Release 1.1 (and is in a closed status) but we need to know that the test case that caused the failure has been successfully re-run. Any test cases listed as Blocked, Caution, Not-Run, Not Applicable, or Failed in this graph need to be executed to verify that all resolved bugs in the release have truly been fixed.

### 3.4.18. Task Graphs

This widget lets you quickly view the three main graphs used when measuring the progress of tasks in an agile methodology:

1. **Task Velocity** – this graph shows the total estimated and actual effort delivered in each project release and/or iteration
2. **Task Burnup** – this graph shows the cumulative amount of work outstanding for each release/iteration in the project with separate lines for the estimated, remaining and completed effort.
3. **Task Burndown** – this graph shows the remaining work that needs to be done for each release/iteration in the project with separate lines for the estimated, remaining and completed effort.

For each of the three graphs you can click on the “Display Data Grid” link to display a grid of the underlying data that is represented in the graph and also there are options to save the graph in a variety of different image formats.

### 3.4.19. Tag Cloud






This widget lets you see the list of document tags being used in the project:



The size of the tag name indicates the relative frequency of its usage in the project. Clicking on a document tag will open up the Document List page (see section 10.1) with the filter set to the tag you clicked on. This will display a list of related documents that have been tagged with the same tag name.

### 3.4.20. Recent Builds

This widget displays a list of the most recent builds that have been performed as part of the current release or iteration:

Name	Status	Creation Date
 <a href="#">Build 0015</a>	Succeeded	3/11/2004 7:00:00 PM
 <a href="#">Build 0014</a>	Succeeded	3/10/2004 7:00:00 PM
 <a href="#">Build 0013</a>	Failed	3/9/2004 7:00:00 PM
 <a href="#">Build 0012</a>	Failed	3/8/2004 7:00:00 PM
 <a href="#">Build 0010</a>	Failed	3/7/2004 7:00:00 PM

For each build it will display whether the build succeeded or failed, the date the build occurred and the name of the build together with a hyperlink to the build details (see section 7.2.7). Note: If no release or iteration is selected then the widget will not display any data.

### 3.4.21. Requirements Graphs

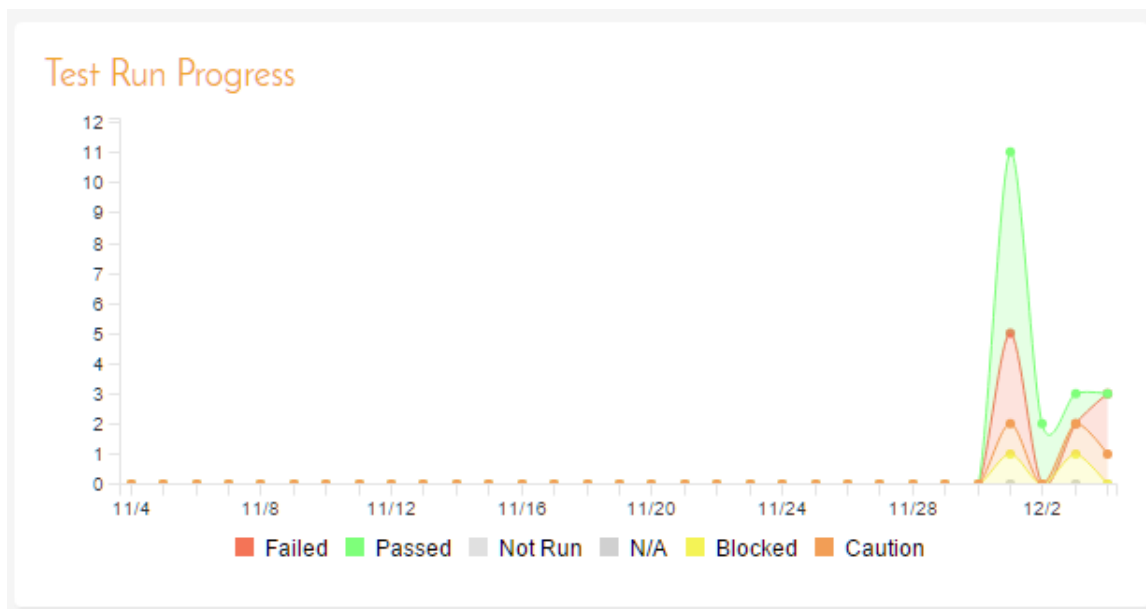
This widget lets you quickly view four different graphs used when measuring the progress of requirements in an agile methodology. They are described in more detail in Reports section (11.8) of this manual.

1. **Requirement Velocity** – this graph shows the actual velocity delivered in each project release and/or iteration compared to the project average and the rolling average.
2. **Requirement Burnup** – this graph shows the cumulative number of story points outstanding for each release/iteration in the project with separate lines for the actual and ideal burnup overlaid on top of a bar-graph that shows the completed story points per release/iteration.
3. **Requirement Burndown** – this graph shows the remaining number of story points that needs to be done for each release/iteration in the project with separate lines for the actual and ideal burndown overlaid on top of a bar-graph that shows the completed story points per release/iteration.
4. **Requirements Coverage** – this graph shows the number of requirements that have test cases that are passed, failed, blocked, cautioned, not run as well those requirements that do not have any test cases (not covered). Unlike the main Requirements Coverage graph on the home page, this one is segmented by requirement importance.

For each of the three graphs you can click on the “Display Data Grid” link to display a grid of the underlying data that is represented in the graph and also there are options to save the graph in a variety of different image formats.

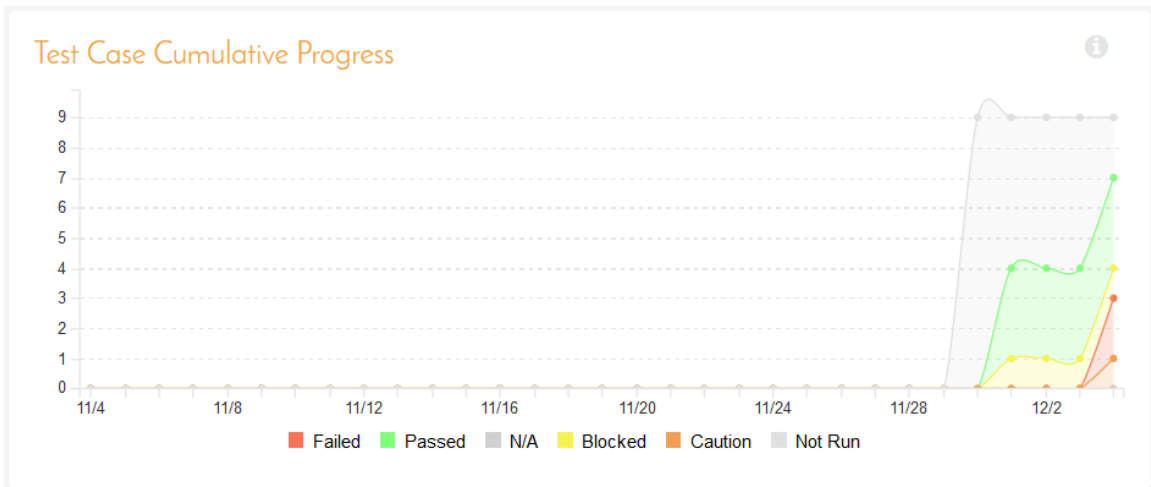
### 3.4.21. Test Run Progress

This section consists of a chart that displays the last 30 days of test run activity, broken down, for each day, by the test run status. This is a useful chart to quickly track the testing activity of the project – this is not the same as overall project status.



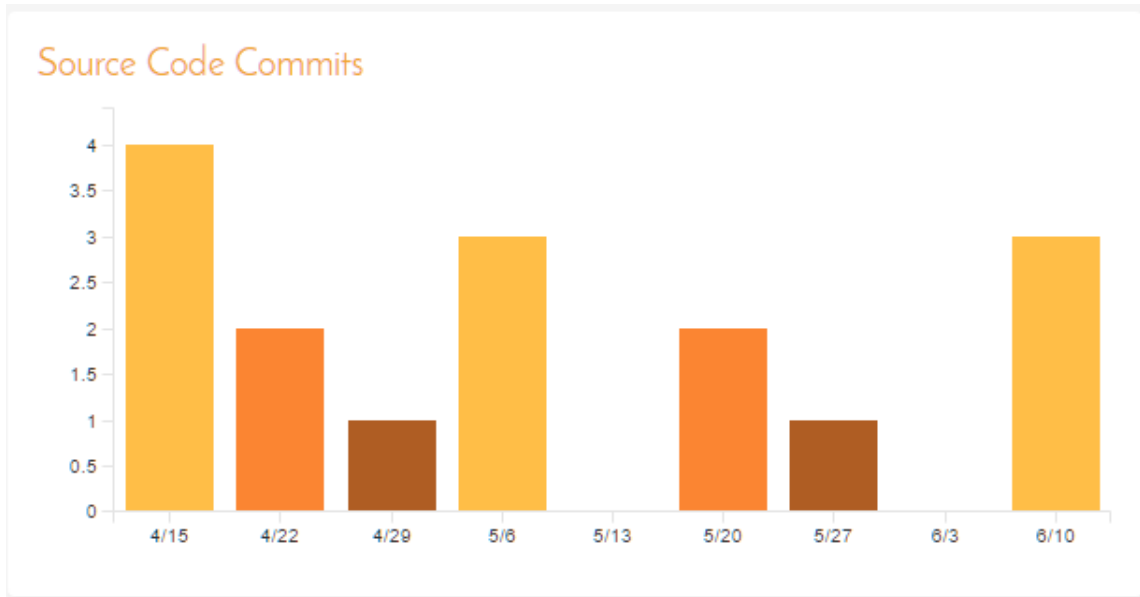
### 3.4.22. Test Case Cumulative Progress

This section consists of a chart that displays the last 30 days of test case executions cumulatively. That means it will display for each day, the total number of test cases executed plus the status from any previous days that have not been changed. Any test cases not executed up to that point will be considered “not run” and will appear in the “not run” category. For example, if you have 10 test cases created on day 1 you will see 10 test cases “not run” on day 1. On day 2, you execute 5 test cases and fail them all, you will now see 5 test cases failed and 5 not run. On day 3, you execute 3 of the previous 5 test cases and pass them. You will now see 3 test cases passed, 2 failed and 5 not run.



### 3.4.23. Source Code Commits

This section consists of a chart that displays the last 3 months of code commits to the project (if you are using the source code functionality of the application). Commits are aggregated by week. The chart is color coded by bottom quartile, the middle 50%, and the top quartile of activity.



### 3.4.23. Incident Open Count

This section shows a bar chart to visualize the breakdown of all open incidents in the project by priority. The chart's bars match the color assigned to that priority. Clicking on the "View Details" link at the top of the widget loads a chart builder where you can further refine and filter the chart to meet your needs.

### 3.4.24. All Pending Test Runs

This section lists all the test runs that are currently being executed by testers in the project. Until a test case or test set is fully executed, a pending test run entry is stored in the system so that you can continue execution at a later date.

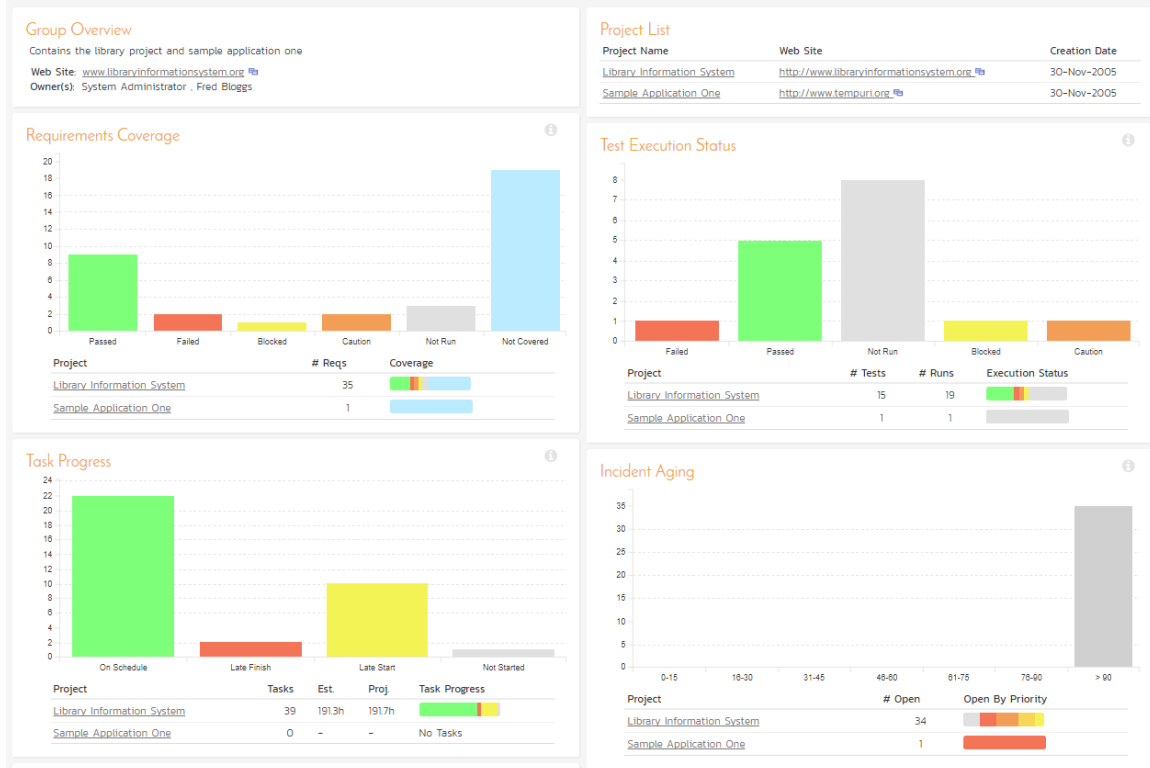
Name	Tester	Last Updated	Progress
Adding new book and author to library 1	System Administrator	20-Apr-2017	<div style="width: 50%;"></div>

Any pending test run can be either deleted or reassigned to another user that is a member of the project by the project manager or test manager.

## 3.5. Project Group Home

When you click on either the Project Group name in the global navigation or the name of the project group in the "My Page" project list, you will be taken to the homepage of the specific project group in question:





This page summarizes all of the information regarding the project group into a comprehensive, easily digestible form that provides a “one-stop-shop” for people interested in understanding the overall status of the group as a whole as well as the relative performance of the different projects that make up the group. It contains summary-level metrics for all types of artifact (requirements, test cases, tasks, incidents, etc.) that you can use to drill-down into the appropriate project for more details.

You will see a small “i” in a circle at the top right of every chart. Hovering or clicking on this will show you information about that chart.

In a similar manner to the ‘My Page’, the Project Group Home dashboard is initially loaded in ‘view mode’ which means that the various ‘widgets’ on the page are displayed with minimum visual clutter (no toolbars or control icons) that makes it easy to scan the items on the page and see the health of the status of the project at a glance. To switch the page to ‘edit mode’, you should click the button with the cog icon (⚙️) on the right.

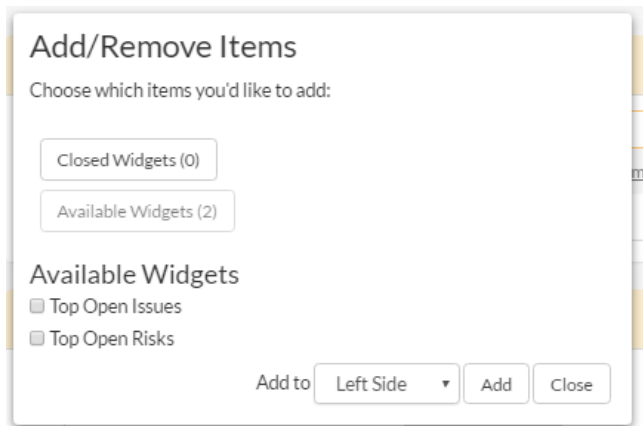
Once in ‘edit mode’, each of the ‘widgets’ displayed on the project group homepage can be minimized by clicking on the arrow icon (▼) in the top-left of the window, or closed by clicking-on the cross icon (✕) in the top-right of the window. In addition, the widgets allow you change their settings by clicking on the settings icon (⚙️). This allows you to customize your view of the project group to reflect the types of information that are relevant to you. If you have closed a widget that you subsequently decide you want to

reopen, you can rectify by clicking the “[+ Add](#)” button at the top of the page, and locating the closed item from the list of ‘Closed Widgets’.

When you load the ‘Project Group Home’ for the first time it will consists of the following main elements:

- Group Overview
- Requirements Coverage
- Task Progress
- Project List
- Test Execution Status
- Incident Aging
- Recent Builds

However these are not the only widgets available. If you click on the “Add/Remove” items hyperlink it will display the list of any additional widgets that are available:



You can add the additional widgets by selecting the appropriate checkbox, choosing the destination location (left side vs. right side) and then click the “[Add](#)” button. The additional widgets available in the Project Group Home dashboard are:

- Top Open Issues
- Top Open Risks

Each of the different widgets listed is described in more detail below:

### **3.5.1. Group Overview**

This section displays the name of the project group, together with a brief description, the web-site that points to any additional information about the project group, and the names of the owners of the project group.

### **3.5.2. Project List**

This section lists all the active projects that make up the group, together with the name, description, project group and date of creation. To view the description of the project, simply position the mouse pointer over the link, and a tooltip window will popup containing the description.

### **3.5.3. Requirements Coverage**

This section consists of a bar graph that displays the aggregated count of requirements test coverage for the entire project group. The Passed, Failed, Blocked, Caution and Not-Run bars indicate the total count of requirements that have tests covering them, allocated across the execution status of the covering tests

Under the main bar graph is displayed a table containing each project in the group and a colored bar illustrating the specific requirements coverage distribution for that project. That way you can see both the aggregate coverage and also the relative coverage for the projects. *You can configure in the widget settings whether you want to see the aggregate bar graph, and/or the project-specific requirements coverage.*

### **3.5.4. Task Progress**

This section consists of a bar graph that displays the aggregated count of tasks by progress category for the entire project group. The 'On Schedule', 'Late Finish', 'Late Start' and 'Not Started' bars indicate the total count of tasks that are in that category for all the projects in the group.

Under the main bar graph is displayed a table containing each project in the group and a colored bar illustrating the specific task progress for that project (using the same coloring convention as the main graph). That way you can see both the aggregate task progress and also the relative progress for each project. *You can configure in the widget settings whether you want to see the aggregate bar graph, and/or the project-specific task progress.*

### **3.5.5. Test Execution Status**

This section consists of a bar graph that displays the aggregated count of test cases by execution status for the entire project group. The Passed, Failed, Blocked, Caution and Not-Run bars indicate the total count of test cases that are in that category for all the projects in the group.

Under the main bar graph is displayed a table containing each project in the group and a colored bar illustrating the specific test case execution status for that project (using the same coloring convention as the main graph). That way you can see both the aggregate test status and also the relative status for each project. *You can configure in the widget settings whether you want to see the aggregate bar graph, and/or the project-specific test status.*

### **3.5.6. Incident Aging**

This section displays the number of days incidents have been left open in the system. The chart is organized as a histogram, with the count of incidents on the y-axis (for all projects in the group) and different age intervals on the x-axis.

Under the main bar graph is displayed a table containing each project in the group and a colored bar illustrating the distribution of open incidents by priority for that project. That way you can see both the aggregate aging for the group and also the relative priority of open incidents for each project. *You can configure in the widget settings whether you want to see the aggregate aging histogram, and/or the project-specific incident count by priority.*

### **3.5.7. Top Open Issues**

This section displays a breakdown of the top issues logged against any of the projects in the group, in order of decreasing priority. Note that items not given a priority are listed at the top, since critical issues could be lurking in that list, and the project manager will want to immediately review these to assign priorities. Clicking on the issue item hyperlink will take you to the incident details page for the issue in question (see section 6.2). *You can configure in the settings whether to use Priority or Severity for the display, and also how many rows of data to display.*

### **3.5.8. Top Open Risks**

This section displays a breakdown of the top risks logged against any of the projects in the group, in order of decreasing priority. Note that items not given a priority are listed at the top, since critical risks could be lurking in that list, and the project manager will want to immediately review these to assign priorities. Clicking on the risk item hyperlink will take you to the incident details page for the risk in question (see section 6.2). *You can configure in the settings whether to use Priority or Severity for the display, and also how many rows of data to display.*


### **3.5.9. Recent Builds**

This widget displays a list of the most recent build and its status for each project in the program/project group. For each project it will display whether the build succeeded or failed, the date the build occurred and the name of the build together with a hyperlink to the build details (see section 7.2.7).

### 3.6. My Profile

When you click on the “[My Profile](#)” button in the global navigation, you will be taken to the page in the system that allows you to view and edit your personal profile:

Please review the information listed below and make any changes if necessary.  
Click [Save] to save changes. x

User Logo: 

The Avatar image cannot be more than 100k in size and no larger than 100x100 pixels square. Only JPG, GIF, and PNG image types are allowed. You will need to clear your browser cache to see the new avatar.

User Name/ID: administrator [US:1]

First Name:\* System

Middle Initial: \_\_\_\_\_

Last Name:\* Administrator

Enable RSS Feeds

RSS Token: [B9050F75-C5E6-4244-8712-FBF20061A976]

Department: \_\_\_\_\_

Organization: \_\_\_\_\_

Start Page:\* My Page ▼

You can change your user information including your first-name, last-name, middle-initial, avatar icon, department and your choice of start-page. Clicking the “[Save](#)” button will commit the changes, whereas clicking <Cancel> returns you back to either “Project Home” or “My Page” depending on whether you have a project currently selected or not.

If you want to be able to subscribe to RSS feeds of the information assigned to you in the “My Page”, make sure that the “Enable RSS Feeds” switch is set to “Yes” and an RSS token has been generated underneath.

You can change your start page to be any of the following:

- **My Page** – When you first log-in, you will be taken to your “My Page” dashboard

- **Last Opened Project** – When you first login-in, you will be taken to the home page for the project you last had open
- **Last Opened Project Group** - When you first login-in, you will be taken to the home page for the project group you last had open

### 3.6.1. Change Password

In addition to being able to update your user information, you can optionally change your password at the same time. To change your password, on the Change Password tab fill in the three boxes with your current password, and your new password repeated for verification. Then when the “**Save**” button is clicked, the system will update your password, otherwise you will simply get a warning message indicating what needs to be corrected.

Passwords & Security	Email Preferences	LDAP Settings	Regional Settings	Actions
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**Change Password**

To change your password, you must enter your current password and the password you would like to change it to.

Current Password:

New Password:

Confirm Password:

Passwords are required to be a minimum of 6 characters in length.

**Change Password Question/Answer**

To change your password security question/answer you need to enter your current password together with the new question and answer.

Current Password:

Question:

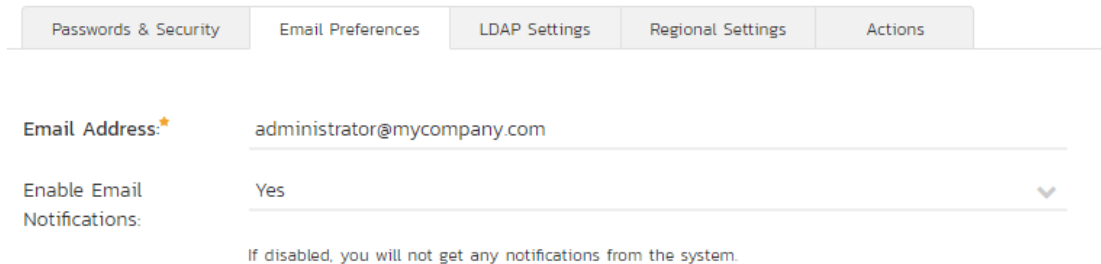
Answer:

You can also change the current password retrieval question and answer by entering in your current password (for security reasons) as well as the new password question and answer.

**Note:** If your SpiraTest user profile is linked to an account stored in an external LDAP server, you may find the change password option is disabled. This is because the system uses the password held in the

external server. To change the password in this case, please contact your system administrator who will be able to help you change the password in your LDAP environment.

### 3.6.2. Email Preferences



Passwords & Security | Email Preferences | LDAP Settings | Regional Settings | Actions

Email Address\* administrator@mycompany.com

Enable Email Notifications: Yes

If disabled, you will not get any notifications from the system.

Here you can configure the email address that the application will send notifications to, and whether or not you want to receive email notifications.

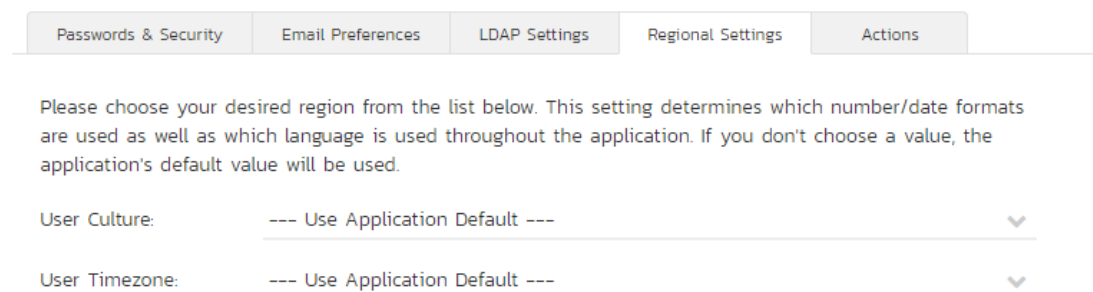
If the Enable Notifications cannot be changed, it means that the system is either not configured to send out notifications, or the administrator has disabled user's ability to opt out of notifications being sent.

### 3.6.3. LDAP Settings

This tab will show configured LDAP options for your account. At this time, no configurable options are on this tab, it is for reference only.

### 3.6.4. Regional Settings

This tab will display the current culture and timezone associated with your profile:



Passwords & Security | Email Preferences | LDAP Settings | Regional Settings | Actions

Please choose your desired region from the list below. This setting determines which number/date formats are used as well as which language is used throughout the application. If you don't choose a value, the application's default value will be used.

User Culture: --- Use Application Default ---

User Timezone: --- Use Application Default ---

By default all profiles will be set to use the application's default culture and timezone. This means that the language, number formats and timezone used in the application will be the ones decided by the person who installed the system. However there are cases where you want to use a different language, timezone or number format (for example, a German employee working in the German office of a French company

might want to use the German culture instead of French). You can change the culture and/or timezone to any of the options listed in the dropdown list.

Note: The system will only be installed with a certain number of language packs, so in some cases a selected culture will only change the number formats and not the languages displayed.

### 3.6.5. Actions

This tab displays the list of recent actions that you have performed in the system (across all projects):

Passwords & Security | Email Preferences | LDAP Settings | Regional Settings | **Actions**

Displaying 1 - 0 out of 0 items. Refresh Filter

Change Date Project Artifact Type Artifact Name Artifact ID Change Type

Show 15 rows per page Displaying page 1 of 1

You can search and filter the grid to find changes by project, change date range, artifact type and type of change (added, deleted, or modified).

### 3.7. My Timecard

When you click on My Page > My Timecard the system will display a timecard that allows you to enter the effort worked on incidents and tasks currently assigned to you (across all your projects):



## My Timecard Fred Bloggs

The following open artifacts are currently assigned to you.  
Please enter the hours worked and hours remaining in the appropriate effort entry boxes below:

### My Assigned Tasks

Task Name	Priority	Start Date	End Date	Project Name	Effort To Date	Additional Effort	Remaining Effort
<input checked="" type="checkbox"/> TK21 <a href="#">Develop new edition entry screen</a>	1 - Critical	10-Mar-2004	11-Mar-2004	Library Information System	7.0 hours	<input type="text"/> hours	<input type="text"/> 2.0 hours
<input checked="" type="checkbox"/> TK22 <a href="#">Create edition object insert method</a>	1 - Critical	10-Mar-2004	11-Mar-2004	Library Information System	3.3 hours	<input type="text"/> hours	<input type="text"/> 2.5 hours
<input checked="" type="checkbox"/> TK23 <a href="#">Write edition object insert queries</a>	1 - Critical	10-Mar-2004	11-Mar-2004	Library Information System		<input type="text"/> hours	<input type="text"/> 3.0 hours
<input checked="" type="checkbox"/> TK27 <a href="#">Refactor author screen to include delete button</a>	2 - High	8-Mar-2004	9-Mar-2004	Library Information System		<input type="text"/> hours	<input type="text"/> 6.0 hours
<input checked="" type="checkbox"/> TK28 <a href="#">Create author object delete method</a>	2 - High	8-Mar-2004	9-Mar-2004	Library Information System	2.3 hours	<input type="text"/> hours	<input type="text"/> 2.5 hours
<input checked="" type="checkbox"/> TK29 <a href="#">Write author object delete query</a>	2 - High	8-Mar-2004	9-Mar-2004	Library Information System	0.8 hours	<input type="text"/> hours	<input type="text"/> 2.3 hours
<input checked="" type="checkbox"/> TK40 <a href="#">Develop edit subject details screen</a>	3 - Medium	25-Oct-2004	26-Oct-2004	Library Information System		<input type="text"/> hours	<input type="text"/> 7.0 hours
<input checked="" type="checkbox"/> TK41 <a href="#">Create subject object update method</a>	3 - Medium	25-Oct-2004	26-Oct-2004	Library Information System		<input type="text"/> hours	<input type="text"/> 5.0 hours
<input checked="" type="checkbox"/> TK42 <a href="#">Write subject object update queries</a>	3 - Medium	25-Oct-2004	26-Oct-2004	Library Information System		<input type="text"/> hours	<input type="text"/> 3.0 hours

### My Assigned Incidents

Incident Name	Priority	Severity	Start Date	Project Name	Effort To Date	Additional Effort	Remaining Effort
<input checked="" type="checkbox"/> IN21 <a href="#">Ability to associate multiple authors</a>	1 - Critical	1 - Critical	19-Nov-2003	Library Information System	0.1 hours	<input type="text"/> hours	<input type="text"/> 0.3 hours
<input checked="" type="checkbox"/> IN46 <a href="#">Test System Limitation</a>	1 - Critical		6-Dec-2003	Library Information System	0.7 hours	<input type="text"/> hours	<input type="text"/> 0.2 hours
<input checked="" type="checkbox"/> IN40 <a href="#">Test Training Item</a>	1 - Critical	2 - High	3-Dec-2003	Library Information System		<input type="text"/> hours	<input type="text"/> 0.4 hours
<input checked="" type="checkbox"/> IN8 <a href="#">Editing the date on a book is clunky</a>	2 - High	4 - Low	5-Nov-2003	Library Information System		<input type="text"/> hours	<input type="text"/> 0.2 hours
<input checked="" type="checkbox"/> IN41 <a href="#">Test Training Item</a>	2 - High		3-Dec-2003	Library Information System		<input type="text"/> hours	<input type="text"/> 0.3 hours
<input checked="" type="checkbox"/> IN53 <a href="#">Test Change Request</a>	3 - Medium		7-Dec-2003	Library Information System		<input type="text"/> hours	<input type="text"/> 0.4 hours
<input checked="" type="checkbox"/> IN23 <a href="#">Ability to import data from excel</a>	3 - Medium	2 - High	25-Nov-2003	Library Information System	0.3 hours	<input type="text"/> hours	<input type="text"/> 0.1 hours
<input checked="" type="checkbox"/> IN48 <a href="#">Test System Limitation</a>	3 - Medium	3 - Medium	6-Dec-2003	Library Information System	1.3 hours	<input type="text"/> hours	<input type="text"/> 0.1 hours
<input checked="" type="checkbox"/> IN61 <a href="#">Sample Risk 3</a>	4 - Low	4 - Low	10-Dec-2003	Library Information System	0.8 hours	<input type="text"/> hours	<input type="text"/> 0.1 hours

The system will only include projects that have time-tracking enabled for incidents and tasks, so if some of your assigned incidents or tasks are missing, please check with the project owner of the projects affected to have them enable time-tracking.

Each task or incident will be displayed along with its priority, severity, start-date, end-date, project name effort remaining and effort expended to date. For each item you can then indicate the additional actual effort performed (which will be added to the "actual effort") and modify the amount of hours remaining. Once you are satisfied, click [Submit Timecard] to commit the changes.

## 4. Requirements Management

This section outlines how the requirements management features of SpiraTeam® can be used to develop a requirements / scope matrix for a project, and how you can map any existing test-cases to the requirements. Typically when starting a project, developing the requirements list is the first activity after the Administrator has set up the project in the system.

### 4.1. Requirements List

When you click on the Planning > Requirements link on the global navigation bar, you will initially be taken to the requirements list screen illustrated below:

Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID
Functional System Requirements	100%	100%	1 - Critical	In Progress	Fred Bloggs		Package	RQ1
Online Library Management System	100%	100%	1 - Critical	In Progress	Fred Bloggs		Package	RQ2
Book Management	100%	100%	1 - Critical	Developed	Fred Bloggs		Package	RQ3
Ability to add new books to the system	100%	100%	1 - Critical	Developed	Fred Bloggs	10.0.0.0001	Feature	RQ4
Ability to add new books to the system (3)	100%	No Tasks	1 - Critical	Developed	Fred Bloggs	10.0.0.0001	Feature	RQ70
Ability to add new books to the system (2)	100%	No Tasks	1 - Critical	Developed	Fred Bloggs	10.0.0.0001	Feature	RQ69
Ability to add new books to the system	100%	No Tasks	1 - Critical	Developed	Fred Bloggs	10.0.0.0001	Feature	RQ68
Ability to edit existing books in the system	100%	100%	1 - Critical	Developed	Fred Bloggs	10.0.0.0001	Feature	RQ5
Ability to delete existing books in the system	100%	100%	1 - Critical	Developed	Fred Bloggs	10.0.0.0002	Feature	RQ6
Ability to associate books with different subjects	100%	100%	1 - Critical	Developed	Fred Bloggs	11.0.0.0001	Feature	RQ7
Ability to associate books with different authors	100%	100%	1 - Critical	Developed	Fred Bloggs	11.0.0.0001	Feature	RQ8
Ability to associate books with different editions	100%	100%	1 - Critical	Developed	Fred Bloggs	11.0.0.0002	Feature	RQ9
Ability to completely erase all books stored in the system with one click	100%	100%	1 - Critical	Developed	Fred Bloggs	12.0.0	Feature	RQ10
Edition Management	Not Covered	100%	1 - Critical	In Progress	Fred Bloggs		Package	RQ11
Ability to create different editions	Not Covered	100%	1 - Critical	In Progress	Fred Bloggs	10.0.0.0003	Feature	RQ12

The requirements list consists of a hierarchical arrangement of the various requirements and functionalities that need to be provided by the system in question. The structure is very similar to the Work Breakdown Structure (WBS) developed in Microsoft Project®, and users of that software package will find this very familiar to use. When you create a new project, this list will initially be empty, and you will have to start using the “**Insert**” button to start adding requirements.

Requirements come in two main flavors: summary items shown in **bold-type**, and detail items shown in normal-type with a hyperlink. When you indent a requirement under an existing requirement, the parent is changed from a detail-item to a summary-item, and when you outdent a child item, its parent will return to a detail-item (assuming it has no other children). This behavior is important to understand, as only detail items are assigned a status themselves; the summary items simply display an aggregate of the worst-case assessment of their children’s status. Both summary and detail items can be mapped against test-cases for test-coverage, in addition the summary items display an aggregate coverage status.

Each requirement is displayed along with its importance/priority (ranked from “Critical” to “Low”), its completion status (from “Requested” to “Completed”), the version of the software that the requirement is planned for, and graphical indicators that represents its test coverage status and its task progress.

For those requirements that have no test-cases covering them (i.e. validating that the requirement works as expected) the indicator consists of a white solid bar, bearing the legend “Not Covered”. For those requirements that have *at least one* test-case mapped against them, they will display a block graph that illustrates the last execution status of each of the mapped test-cases. Thus if the requirement is covered by two test cases, one of which passed, and one of which wasn’t run, the graph will display a green bar (50% passed) and an equal length gray bar (50% not run). To determine the exact requirements coverage information, position the mouse pointer over the bar-chart, and the number of covering tests, along with the pass / fail / blocked / caution / not-run breakdown will be displayed as a “tooltip”.

For those requirements that have at least one task associated with them, they will display a block graph that illustrates the relative numbers of task that are on-schedule (green), late-starting (yellow), late-finishing (red) or just not-started (grey). These values are weighted by the effort of the task, so that larger, more complex tasks will be change the graph more than the smaller tasks. To determine the exact task progress information, position the mouse pointer over the bar-chart and the number of associated tasks, along with the details of how many are in each status will be displayed as a “tooltip”.

#### **4.1.1. Insert**

Clicking on the <Insert> icon inserts a requirement *above* the currently selected requirement – i.e. the one whose check-box has been selected, at the same level in the hierarchy. If you want to insert a requirement below an existing item, you can use the Insert > Child Requirement option instead. If you insert a requirement without first selecting an existing requirement from the list, the new requirement will simply be added at the end of the list. Note that if the full list of requirements are paginated, the new requirement will be at the bottom of the last page.

Once the new requirement has been inserted, the item is switched to “Edit” mode so that you can rename the default name and choose a priority, status and/or author.

#### **4.1.2. Delete**

Clicking on the “**Delete**” button deletes all the requirements whose check-boxes have been selected. If any of the items are summary items, the child requirements are also deleted. If all the children are deleted from a summary item, it changes back into a non-summary item.

### 4.1.3. Indent

Clicking on the “**Indent**” button indents all the requirements whose check-boxes have been selected. If any of the items are made children of a requirement that had no previous children, it will be changed from a detail item into a summary item.

### 4.1.4. Outdent

Clicking on the “**Outdent**” button de-indent all the requirements whose check-boxes have been selected. If any of the items were the only children of a summary requirement item, then that item will be changed back from a summary item to a detail item.

### 4.1.5. Refresh

Clicking on the “**Refresh**” button simply reloads the requirements list (not the entire page). This is useful as other people may be modifying the list of requirements at the same time as you, and after stepping away from the computer for a short-time, you should click this button to make sure you are viewing the most current requirements list for the project.

### 4.1.6. Edit

Each requirement in the list has an “**Edit**” button display in its right-most column. When you click this button or just *double-click* on any of the cells in the row, you change the item from “View” mode to “Edit” mode. The various columns are made editable, and “**Update**” “**Cancel**” buttons are displayed in the last column:

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Use Cases	-- Any --	No Tasks	-- Any --	-- Any --	-- Any --	-- Any --	RQ:29	Edit
Creating a new book in the system	100%	No Tasks	1 - Critical	Completed		Use Case	RQ:30	Edit
Editing an existing book in the system	100%	No Tasks	1 - Critical	Completed		Use Case	RQ:31	Edit
Deleting an existing book from the system	Not Covered	No Tasks	1 - Critical	Completed		Use Case	RQ:32	Edit
Online Library Management	50%	50%	-- None --	In Progress	-- None --	Package		Save Cancel
Book Management	100%	100%	1 - Critical	Developed		Package	RQ:3	Edit
Ability to add new books to the system	100%	100%	1 - Critical	Developed	1.0.0.0001	Feature	RQ:4	Edit
Ability to edit existing books in the system	100%	100%	1 - Critical	Developed	1.0.0.0001	Quality	RQ:5	Edit
Ability to delete existing books in the system	100%	100%	1 - Critical	Developed	1.0.0.0002	Need	RQ:6	Edit
Ability to associate books with different subjects	100%	100%	1 - Critical	Developed	1.1.0.0001	Feature	RQ:7	Edit
Ability to associate books with different authors	100%	100%	1 - Critical	Developed	1.1.0.0001	Feature	RQ:8	Edit
Ability to associate books with different editions	100%	100%	1 - Critical	Developed	1.1.0.0002	Feature	RQ:9	Edit
Ability to completely erase all books stored in th...	100%	100%	1 - Critical	Developed	1.2.0.0	Feature	RQ:10	Edit
Edition Management	Not Covered	50%	1 - Critical	In Progress		Package	RQ:11	Edit
Ability to create different editions	Not Covered	50%	1 - Critical	In Progress	1.0.0.0003	Feature	RQ:12	Edit

If you click “**Edit**” on more than one row, the “**Update**” and “**Cancel**” buttons are only displayed on the first row selected. You can make changes to all the editable rows and then update the changes by clicking the

one **“Update”** button. Also, if you want to make the same change to multiple rows (e.g. to change five requirements from “In Progress” status to “Completed”), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

Requirement Name	Test Coverage	Progress	Importance	Status	Release	Type	Use Case
Online Library Management System	Not Covered	No Tasks	1 - Critical	In Progress	1.0.0.0000	Package	RQ:32
Ability to add new books to the system	Not Covered	No Tasks	1 - Critical	Developed	1.0.0.0000	Feature	
Ability to edit existing books in the system	Not Covered	No Tasks	1 - Critical	Developed	1.0.0.0000	Quality	
Ability to delete existing books in the system	Not Covered	No Tasks	1 - Critical	Developed	1.0.0.0000	Need	
Ability to associate books with different subjects	Not Covered	No Tasks	1 - Critical	Developed	1.1.0.00001	Feature	RQ:7

If you want to edit lots of items, first select their checkboxes and then click the [Edit] button on the same row as the Filters and it will switch all the selected items into edit mode.

When you have made your updates, you can either click **“Save”** to commit the changes, or **“Cancel”** to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

#### 4.1.7. Show Level

Choosing an indent level from the ‘Show Level’ drop down box allows you to quickly and easily view the entire requirements list at a specific indent level. For example you may want to see all requirements drilled-down to the *third* level of detail. To do this you would simply choose ‘Level 3’ from the list, and the requirements will be expanded / collapsed accordingly.

#### 4.1.8. Filtering

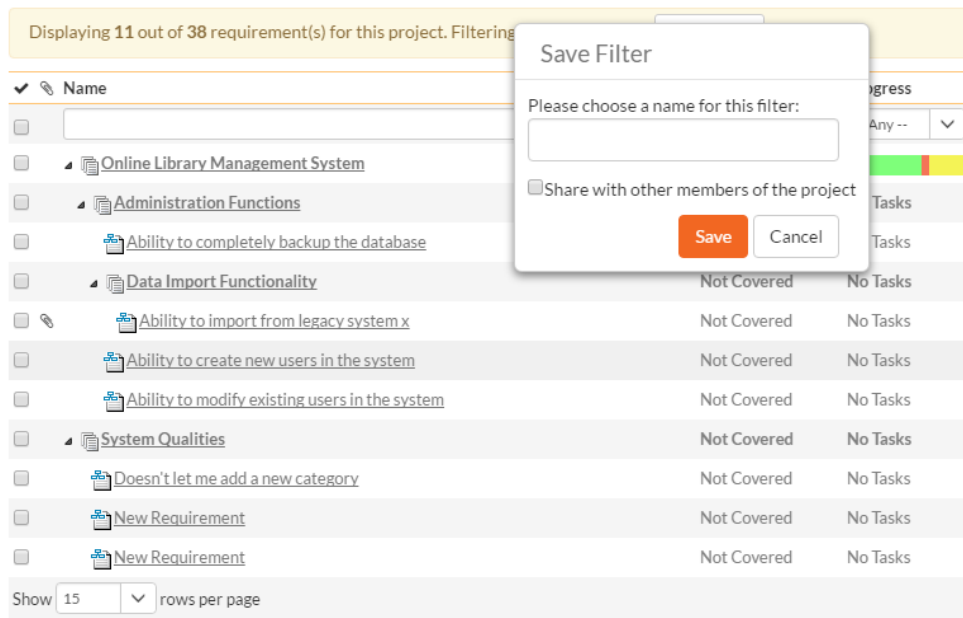
You can easily filter the list of requirements as illustrated in the screen-shot below:

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Online Library Management System	Not Covered	No Tasks	3 - Medium	In Progress		Package	RQ:2	Edit
Administration Functions	Not Covered	No Tasks	3 - Medium	Requested		Package	RQ:22	Edit
Ability to completely backup the database	Not Covered	No Tasks	4 - Low	Requested		Feature	RQ:23	Edit
Data Import Functionality	Not Covered	No Tasks	4 - Low	Requested		Package	RQ:24	Edit
Ability to import from legacy system x	Not Covered	No Tasks	4 - Low	Requested		Feature	RQ:25	Edit
Ability to create new users in the system	Not Covered	No Tasks	3 - Medium	Requested		Feature	RQ:26	Edit
Ability to modify existing users in the system	Not Covered	No Tasks	3 - Medium	Requested		Feature	RQ:27	Edit
System Qualities	Not Covered	No Tasks	3 - Medium	In Progress		Package	RQ:33	Edit
Doesn't let me add a new category	Not Covered	No Tasks	3 - Medium	Requested		Feature	RQ:37	Edit
New Requirement	Not Covered	No Tasks	3 - Medium	Requested		Feature	RQ:38	Edit
New Requirement	Not Covered	No Tasks	3 - Medium	Requested		Feature	RQ:39	Edit

To filter the list by any of the displayed columns, you either choose an item from the appropriate drop-down list or enter a free-text phrase (depending on the type of field) then click the <Filter> icon or press the <ENTER> key to apply the different filters. Note that the name field is searched using a “LIKE”

comparison, so that searching for “database” would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, requirement numbers). In the screen-shot above, we are filtering on Status = Requested.

In addition, if you have a set of filters that you plan on using on a regular basis, you can choose the option Filter > Save Filter to add the current filter to the list of saved filters that appear on your ‘My Page’. If you would like to share the filter with other members of the project, choose the “Share with other members of the project” option. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter:



As a shortcut, the left hand panel includes a set of **Quick Filters** that can be applied in a single-click:

- **The topmost section** – This displays any saved requirement filters created by the current user alongside any ‘shared’ filters. The latter are marked with an icon showing a group of people.
- **Components** – This section lists the components defined for the current project. Clicking on any of the components in the list will filter the requirements to only show those that belong to the selected component.
- **Releases** – This section lists the releases and iterations defined for the current project. Clicking on any of the releases or iterations in the list will filter the requirements by that release/iteration.

#### 4.1.9. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the requirement list as columns for the current project. To show a column that is not already displayed, simply select that column from the

list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

#### 4.1.10. Copying Requirements

To copy a requirement or set of requirements, simply select the check-boxes of the requirements you want to copy and then select the Edit > Copy Items menu option. This will copy the current requirements selection to the clipboard. Then you should select the place where you want the requirements to be inserted and choose the Edit > Paste Items option.

The requirements will now be copied into the destination location you specified. The name of the copied requirements will be prefixed with “Copy of...” to distinguish them from the originals. Note that copied requirements will also include the test coverage information from the originals.

#### 4.1.11. Moving Requirements

To move a requirement in the requirements hierarchy, there are two options:

1. Click on the requirement you want to move and then drag it to the location you want it moved. An empty space will appear to show you where it will be inserted:

Name	Test Coverage	Progress	Importance	Status	Release	Type	ID	Edit
Use Cases	Developed					Package	RQ:29	Edit
Ability to delete existing books in the system	Developed		1 - Critical	Developed	1.0.0.0.0002	Need	RQ:6	Edit
Creating a new book in the system	Completed	No Tasks		Completed		Use Case	RQ:30	Edit
Editing an existing book in the system	Completed	No Tasks		Completed		Use Case	RQ:31	Edit
Deleting an existing book from the system	Completed	No Tasks		Completed		Use Case	RQ:32	Edit
Online Library Management System	In Progress			In Progress		Package	RQ:2	Edit
Book Management	Developed		1 - Critical	Developed		Package	RQ:3	Edit
Ability to add new books to the system	Developed		1 - Critical	Developed	1.0.0.0.0001	Feature	RQ:4	Edit
Ability to edit existing books in the system	Developed		1 - Critical	Developed	1.0.0.0.0001	Quality	RQ:5	Edit
Ability to associate books with different subjects	Developed		1 - Critical	Developed	1.1.0.0.0001	Feature	RQ:7	Edit
Ability to associate books with different authors	Developed		1 - Critical	Developed	1.1.0.0.0001	Feature	RQ:8	Edit
Ability to associate books with different editions	Developed		1 - Critical	Developed	1.1.0.0.0002	Feature	RQ:9	Edit
Ability to completely erase all books stored in the system	Developed		1 - Critical	Developed	1.2.0	Feature	RQ:10	Edit
Edition Management	In Progress		1 - Critical	In Progress		Package	RQ:11	Edit
Ability to create different editions	In Progress		1 - Critical	In Progress	1.0.0.0.0003	Feature	RQ:12	Edit

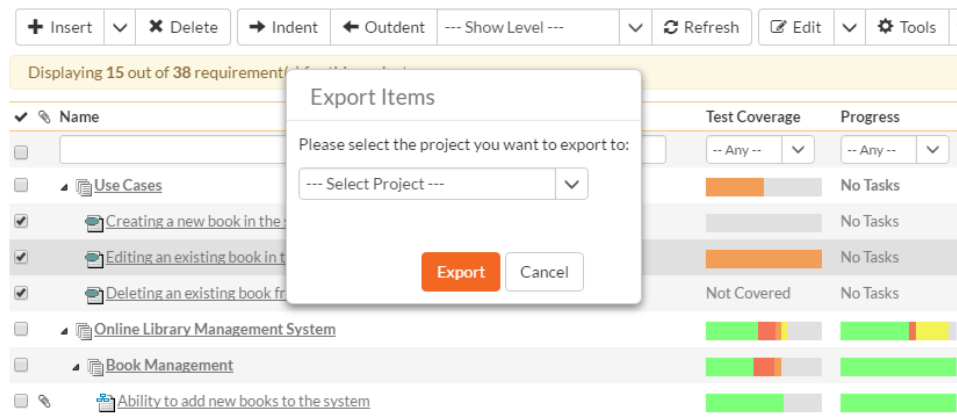
Once you have the requirement positioned at the correct place that you want it inserted, just release the mouse button. To move multiple items simply select their checkboxes and then drag-and-drop one of the selected items.

2. Alternatively you can simply select the check-boxes of the requirements you want to move and then select the Edit > Cut menu option. This will cut the current requirements selection to the

clipboard. Then you should select the place where you want the requirements to be inserted and choose the Edit > Paste option. The requirements will now be moved into the destination location you specified.

#### 4.1.12. Exporting Requirements

To export a requirement or set of requirements from the current project to another project in the system, all you need to do is select the check-boxes of the requirement(s) you want to export and then click the Tools > [Export To Project](#) button. This will then bring up a list of possible destination projects:



Once you have chosen the destination project and clicked the “[Export](#)” button, the requirements will be exported from the current project to the destination project. Any file attachments will also be copied to the destination project along with the requirements.

#### 4.1.13. Creating Test Cases from Requirements

To quickly create test cases from a group of requirements, all you need to do is select the check-boxes of the appropriate requirements and then click Tools > [Create Test Cases](#). This will then create new test cases based on the selected requirements.

#### 4.1.14. Creating a Test Set from Requirements

To quickly create a new test set from a group of requirements, all you need to do is select the check-boxes of the appropriate requirements and then click Tools > [Create Test Set](#). This will then create new test set containing the test cases that are already mapped to the selected requirement(s).

#### 4.1.15. Printing Items

To quickly print a single requirement or list of requirements you can select the items' checkboxes and then click Tools > [Print Items](#). This will open a new window containing a printable version of the selected items.

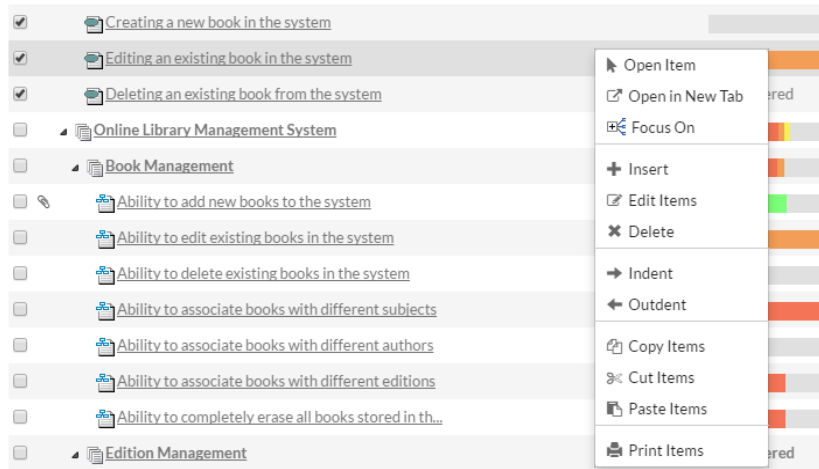


#### 4.1.16 Focus-On Branch

Sometimes you will a list of filtered requirements displayed and you would like to view all of the items that in the same branch of the requirements tree, even those that don't match the current filter. To view the branch, select the checkbox of the branch and then click Tools > **Focus on**, and the system will clear the current filters and then expand just the selected branch.

#### 4.1.17. Right-Click Context Menu

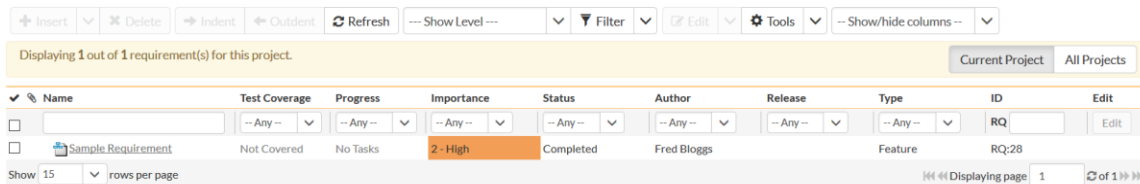
SpiraTeam® provides a shortcut – called the *context menu* - for accessing some of the most commonly used functions, so that you don't need to move your mouse up to the toolbar each time. To access the context menu, right-click on any of the rows in the requirements list and the following menu will be displayed:



You can now choose any of these options as an alternative to using the icons in the toolbar.

#### 4.1.18. Viewing Requirements from Shared Projects

If you are displaying the requirements list for a project has required shared from other projects, you will see the option on the top-right to view the requirements from the shared project(s):



If you choose the option to show the requirement from 'All Projects' and not just the current project, the shared projects are displayed, grouped under the name of the project they are being shared from:

✓ Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID
Sample Requirement	Not Covered	No Tasks	2 - High	Completed	Fred Bloggs		Feature	RQ:28
Library Information System								
Functional System Requirements				In Progress	Fred Bloggs		Package	RQ:1
Online Library Management System				In Progress	Fred Bloggs		Package	RQ:2
Book Management			1 - Critical	Developed	Fred Bloggs		Package	RQ:3
Ability to add new books to the system			1 - Critical	Developed	Fred Bloggs	1.0.0.0.0001	Feature	RQ:4
Ability to edit existing books in the system			1 - Critical	Developed	Fred Bloggs	1.0.0.0.0001	Feature	RQ:5
Ability to delete existing books in the system			1 - Critical	Developed	Fred Bloggs	1.0.0.0.0002	Feature	RQ:6
Ability to associate books with different subjects			1 - Critical	Developed	Fred Bloggs	1.1.0.0.0001	Feature	RQ:7
Ability to associate books with different authors			1 - Critical	Developed	Fred Bloggs	1.1.0.0.0001	Feature	RQ:8
Ability to associate books with different editions			1 - Critical	Developed	Fred Bloggs	1.1.0.0.0002	Feature	RQ:9
Ability to completely erase all books stored in the system with one click			1 - Critical	Developed	Fred Bloggs	1.2.0.0	Feature	RQ:10
Edition Management	Not Covered		1 - Critical	In Progress	Fred Bloggs		Package	RQ:11
Author Management			2 - High	In Progress	Joe P Smith		Package	RQ:13
Subject Management	Not Covered		3 - Medium	Planned	Joe P Smith		Package	RQ:19

Note: Any requirements shared from other projects will be read-only and won't display any of their custom properties. However you can expand/collapse these shared requirements and filter using the standard fields.

## 4.2. Requirement Details

When you click on a requirement item in the requirements list described in section 4.1, you are taken to the requirement details page illustrated below:

The screenshot shows the 'Ability to add new books to the system' requirement details page. The page is divided into three main sections:

- Left Pane:** A navigation tree showing the hierarchy of requirements. The selected requirement is 'Ability to add new books to the system' under 'Book Management'.
- Main Content Area:**
  - Header:** 'Ability to add new books to the system' with a 'Requirement [RQ:4] Type: Feature' and 'Status: Developed'.
  - Overview Tab:**
    - Releases:** Release: 1.0.0.0.0001
    - Properties:** Importance: 1 - Critical, Component: Book Management, URL: http://www.libraries.org, Difficulty: Moderate, Classification: --- Please Select ..., Ranking: 1, Decimal: 1.234
    - Dates and Times:** Creation Date: 11/30/2003 7:00:00 PM, Last Updated: 11/30/2003 7:00:00 PM, Estimate (points): 2.0 (16.0h), Review Date: 7/3/2012
    - People:** Author: Fred Bloggs, Owner: Joe P Smith
  - Detailed Information:** A text box containing the description: 'The ability to add new books into the system, complete with ISBN, publisher and other related information'.

This page is made up of *three* areas;

1. the left pane displays the requirements list navigation;

2. the right pane's header, which displays: the operations toolbar; the editable name of the selected requirement; and the info bar (with a shaded background), which also contains the workflow status transitions (see below); and
3. the right pane's tabbed interface with rich information related to the requirement.

Please note that on smaller screen sizes the navigation pane is not displayed. While the navigation pane has a link to take you back to the requirements list, on mobile devices a 'back' button is shown on the left of the operations toolbar.

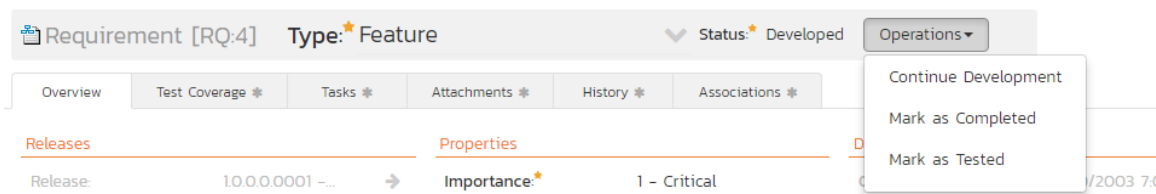
The navigation pane can be collapsed by clicking on the “-“ button, or expanded by clicking anywhere on the gray title area. On desktops the user can also control the exact width of the navigation pane by dragging and dropping a red handle that appears on hovering at the rightmost edge of the navigation pane.

The navigation pane shows a list of the peer requirements to the one selected. This list is useful as a navigation shortcut; you can quickly view the coverage information of all the peer requirements by clicking on the navigation links without having to first return to the requirements list page. The navigation list can be switched between three different modes:

- The list of requirements matching the current filter
- The list of all requirements, irrespective of the current filter
- The list of requirements assigned to the current user

On the main right hand side of the page, which of the fields for the currently selected requirement are available and which are required will depend on your stage in the requirement workflow. For example, a requested requirement might not require a “Release” whereas a planned requirement could well do. The types of change allowed and the fields that are enabled/visible/required will depend on how your project administrator has set up the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring the requirement workflows to better meet their needs.

Depending on the user's role and whether they are listed as the owner or author of the requirement, displayed in the info bar beneath the requirement name is the current workflow status and an “operations” button which, when clicked, will show a set of allowed workflow operations:



These workflow transitions allow the user to move the requirement from one status to another. For example when the requirement is in the Developed status, you will be given the options to:

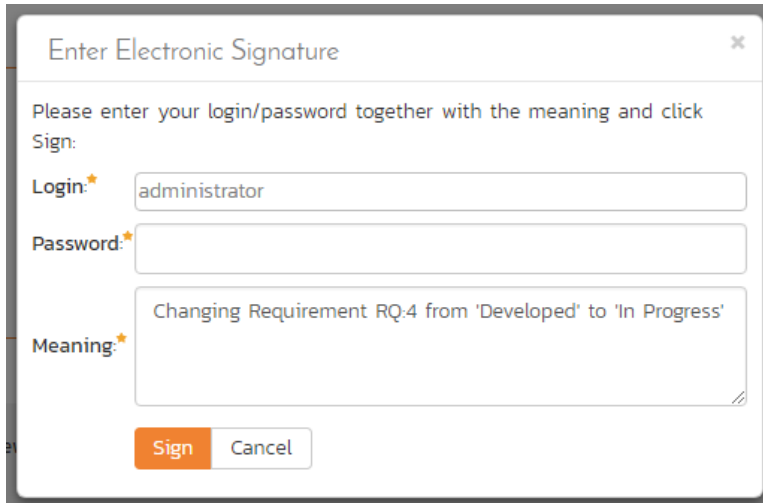
- **Continue Development** – changes status to “In-Progress”
- **Mark as Completed** – changes the status to “Completed”
- **Mark as Tested**- changes the status to “Tested”

After changing the status of the requirement by clicking on the workflow link, you can then fill in the additional fields that are now enabled and/or required. Once you’ve made the changes to the appropriate requirement fields, you can either click “[Save](#)”, “[Save and Close](#)”, or “[Save and New](#)” to commit the changes or “[Refresh](#)” to discard the changes and reload the requirement from the database. In addition you can print the current requirement by clicking “[Print](#)”, which will display a printable version of the page in a separate window.

Please note that if digital signatures have been enabled for a particular workflow operation (and therefore a digital signature is required to confirm the status change. Workflow operations requiring a digital signature are marked with a padlock icon:



On attempting to save changes made after clicking a workflow operation that requires a digital signature you will be presented with the following popup:



Enter Electronic Signature

Please enter your login/password together with the meaning and click Sign:

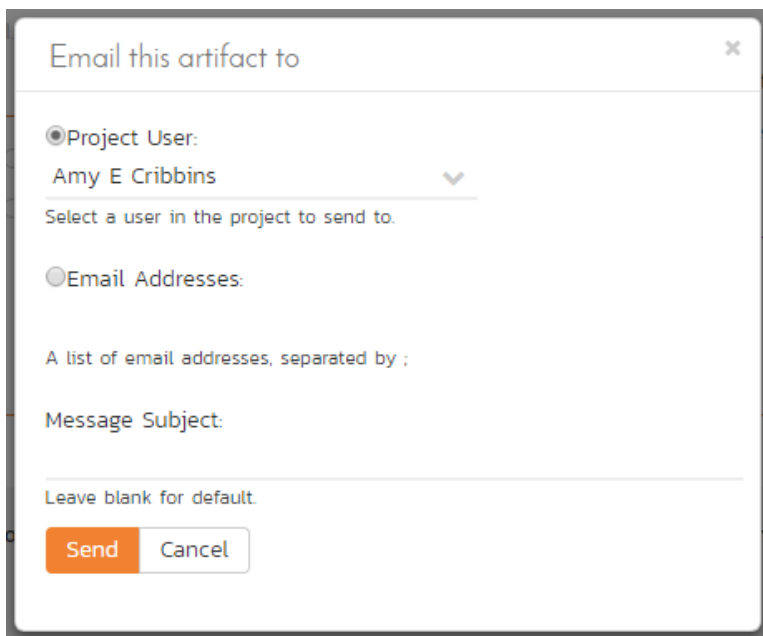
Login:\* administrator

Password:\*

Meaning:\* Changing Requirement RQ:4 from 'Developed' to 'In Progress'

Sign Cancel

Using the “[Email](#)” button on the toolbar, you can send an email containing details of the requirement to an email address or another user on the system:



Email this artifact to

Project User:

Amy E Cribbins

Select a user in the project to send to.

Email Addresses:

A list of email addresses, separated by ;

Message Subject:

Leave blank for default.

Send Cancel

You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user .The content of the email is specified in the System Administration – Notification Templates.

To be notified of any changes made to the current artifact via email, click the “[Subscribe](#)” button. If you already subscribed, the button will instead let you “[Unsubscribe](#)” to stop receiving emails about that

particular artifact. Depending on your role, you may also see a dropdown arrow to the right of this button. This will let you subscribe others in the project to this artifact.

The bottom part of the right pane can be switched between six views: “Overview”, “Test Coverage”, “Tasks”, “Attachments”, “History” and “Associations”, each of which will be described in more detail below.

#### 4.2.1. Overview - Details

The Overview tab is divided into a number of different sections. Each of these can be collapsed or expanded by clicking on the title of that section. It displays the description, fields and comments associated with the requirement.

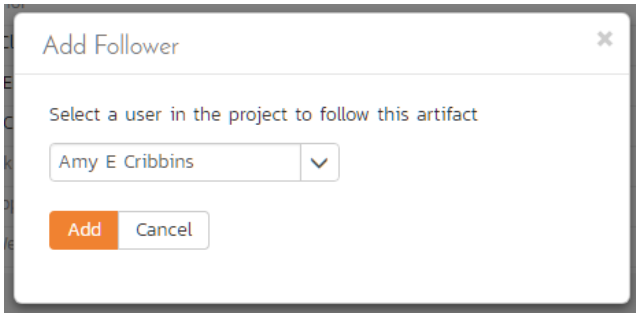
The top part of this tab displays the various standard fields and custom properties associated with the requirement. Fields (both standard and custom) are grouped under the collapsible headings (marked by orange text and underline) in the screenshot below. For instance, all fields regarding dates are grouped together in the “Dates and Times” area.

Releases	Properties	Dates and Times
Release: 1.0.0.0.0001 ...	Importance: 1 - Critical	Creation Date: 11/30/2003 7:00:00 PM
Author: Fred Bloggs	Component: Book Management	Last Updated: 11/30/2003 7:00:00 PM
Owner: Joe P Smith	URL: http://www.libraries.org	Estimate (points): 2.0 (16.0h)
	Difficulty: Moderate	Review Date: 7/3/2012
	Classification: --- Please Select ...	
	Ranking: 1	
	Decimal: 1.234	

##### 4.2.1.1. Followers

Using the “[Subscribe](#)” button on the toolbar, you can quickly follow the item, and receive updates on certain changes to it. Depending on your role, you may also see a dropdown to this button, which let’s you add another project member as a follower to this item.

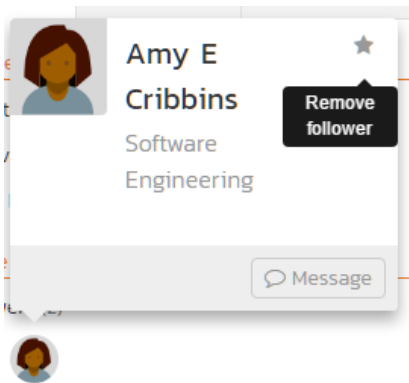
Email    Subscribe    Add Follower



You can also quickly see who is following an incident under the “People” section in the Overview tab.



To view information about the follower, or to unfollow them from the item, hover over their avatar to display a user profile card.



#### 4.2.2. Overview – Detailed Information

The Detailed Information section contains the long, formatted description of the requirement, as well as any rich text custom fields. You can enter rich text or paste in from a word processing program or web page into these fields. Clicking on the shaded areas of one of these detailed fields will display the rich text toolbar.

The ability to add new books into the system, complete with ISBN, publisher and other related information

Notes:

### 4.2.3. Overview - Comments

The Comments section allows you to add and view discussions relating to the requirement:

The screenshot shows the 'Comments' section of a requirement management tool. At the top, there are two buttons: 'newest first' (selected) and 'oldest first'. Below this, three comments are listed in chronological order from top to bottom:

- Wednesday, November 19, 2003 7:00:00 PM**  
Fred Bloggs: OK, that's much better, thanks for adding the additional information.
- Monday, November 10, 2003 7:00:00 PM**  
Joe P Smith: You're right, I have added some more detail and linked to some test cases that define how the functionality is expected to work.
- Sunday, November 9, 2003 7:00:00 PM**  
Fred Bloggs: Need to write a better definition of this requirement, it has too many loose-ends.

Below the comments is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, quote, insert link, insert image, insert table, insert code, and source. At the bottom of the editor is an orange 'Add Comment' button.

Existing comments are displayed in order underneath the textbox in date order (either newest first or oldest first). To add a new comment, enter it into the textbox, and click the “[Add Comment](#)” button.

### 4.2.4. Overview – Scenario

If you are editing a 'Use Case' type of requirement, there will be a special 'Scenario' section where you can enter in the scenario steps that define the use case:



Scenario

<input type="checkbox"/> Step	Description	ID	Edit
<input type="checkbox"/> Step 1	User logs into the system	RS:1	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 2	User chooses option to create new book	RS:2	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 3	User enters books name and author	RS:3	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 4	User chooses book's genre and sub-genre from list	RS:4	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 5	User commits the changes and the new book is added to the system	RS:5	<input type="button" value="Edit"/>

Show  rows per page Displaying page 1 of 1

This sections displays the various steps that a user would perform when carrying out the defined use case. The list of use case steps displays the position number, and the description. If a test case is created from this use-case, the steps will be used to create the test steps.

Clicking on the “***Insert Step***” button inserts a new step *before* the currently selected (by means of the check-box) step. Clicking the “***Insert Step***” button without selecting an existing step will insert a new step at the end of the list. When a new step is inserted, the fields are displayed in “Edit” mode, so the description, field is editable, allowing you to enter the data:

Scenario

<input type="checkbox"/> Step	Description	ID	Edit
<input type="checkbox"/> Step 1	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="font-size: 0.8em; margin-bottom: 5px;"> <span>B</span> <span>I</span> <span>U</span> <span>A</span> <span>🔗</span> <span>🖼️</span> <span>&lt;&gt;</span> <span>✖</span> </div> <div style="border: 1px solid #ccc; height: 40px; margin-bottom: 5px;"></div> <div style="display: flex; justify-content: flex-end; gap: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> </div>		
<input type="checkbox"/> Step 2	User chooses option to create new book	RS:2	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 3	User enters books name and author	RS:3	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 4	User chooses book's genre and sub-genre from list	RS:4	<input type="button" value="Edit"/>
<input type="checkbox"/> Step 5	User commits the changes and the new book is added to the system	RS:5	<input type="button" value="Edit"/>

Show  rows per page Displaying page 1 of 1

To move the steps in the list, click on the step you want to move and drag it to the location you want it moved.

#### 4.2.5. Test Coverage

This tab shows the test coverage information for the requirement in question:

Displaying 1 - 3 out of 3 association(s).

Type	Name	Status	Execution Status	Last Executed	Priority	Project Name	ID
<input type="checkbox"/>	-- Any --	-- Any --	-- Any --		-- Any --	-- Any --	TC
<input type="checkbox"/> Functional	Ability to create new book	Ready for Test	Passed	1-Dec-2003	1 - Critical	Library Information System	TC2
<input type="checkbox"/> Regression	Book management	Ready for Test	Passed	1-Dec-2003	2 - High	Library Information System	TC8
<input type="checkbox"/> Scenario	Adding new book and author to library	Approved	Not Run		3 - Medium	Library Information System	TC13

Show 15 rows per page      Displaying page 1 of 1

The tab displays a grid containing the test cases already mapped to this requirement. You can filter that list by the test case type, name, status, execution status, execution date, priority, project name and ID. You can remove an existing test case by selecting its check box and clicking the 'Delete' button. This doesn't delete the test case, just removes it from the requirement.

Hovering the mouse over the names of the test cases will display a "tooltip" consisting of the test case name, place in the folder structure and a detailed description.

To add a new test case to the requirement, simply click on the 'Add' button:

Root - Filter by name, or search by ID (e.g. TC4)   

- No matches found -

You can search for a test case by its ID if you know it (make sure to include the "TC" prefix):

Root - TC4   

ID	Name	Project
<input type="checkbox"/> TC: 4	Ability to create new author	Library Information System

Otherwise, you can search for the test cases by choosing a folder from the dropdown and/or entering a partial name match:

Root ▾ book

ID	Name	Project
<input type="checkbox"/> TC: 3	Ability to edit existing book	Library Information System
<input type="checkbox"/> TC: 6	Ability to reassign book to different author	Library Information System
<input type="checkbox"/> TC: 19	Adding multiple new books	Library Information System
<input type="checkbox"/> TC: 18	Adding new author and book	Library Information System
<input type="checkbox"/> TC: 21	Create Book	Library Information System
<input type="checkbox"/> TC: 12	Person loses book and needs to report loss	Library Information System

Once you have found the desired test case(s), simply select their check boxes and click the 'Save' button to add them to the current requirement:

Root ▾ book

ID	Name	Project
<input type="checkbox"/> TC: 3	Ability to edit existing book	Library Information System
<input type="checkbox"/> TC: 6	Ability to reassign book to different author	Library Information System
<input checked="" type="checkbox"/> TC: 19	Adding multiple new books	Library Information System
<input checked="" type="checkbox"/> TC: 18	Adding new author and book	Library Information System
<input type="checkbox"/> TC: 21	Create Book	Library Information System
<input type="checkbox"/> TC: 12	Person loses book and needs to report loss	Library Information System

2 Row(s) selected

Finally, as a shortcut you can click the **"Create Test Case from This Requirement"** button to create a new test case in the list of covered test cases that will be automatically linked to this requirement. This is useful when you have created a new requirement and want to generate an initial covering test to be fleshed-out later.

#### 4.2.6. Tasks

This tab shows the list of project tasks that need to be completed for the requirement to be satisfied:

Est. Effort **16.0h** / Projected Effort **0.0h**

Displaying 1 - 3 out of 3 task(s). Filtering results by Requirement #

Name	Progress	Type	Status	Priority	Owner	Release	ID	Edit
<input type="checkbox"/> <input type="text"/>	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	TK	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/> Develop new book entry screen	<div style="width: 100%; height: 10px; background-color: green;"></div>	Development	Completed	1 - Critical	Fred Bloggs	1.0.0.0.0001	TK:1	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/> Create book object insert method	<div style="width: 100%; height: 10px; background-color: green;"></div>	Development	Completed	1 - Critical	Fred Bloggs	1.0.0.0.0001	TK:2	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/> Write book object insert queries	<div style="width: 100%; height: 10px; background-color: green;"></div>	Development	Completed	1 - Critical	Fred Bloggs	1.0.0.0.0001	TK:3	<input type="button" value="Edit"/>

Show  rows per page Displaying page 1 of 1

Each of the tasks is displayed together with, by default, its name, description (by hovering the mouse over the name), progress, priority, start-date, current owner, estimated effort, projected effort and numeric task

identifier. Clicking on the task name will bring up the Task Details page which is described in more detail in section 8.2. This allows you to edit the details of an existing task.

You can perform the following actions on a task from this screen:

- **New Task** – inserts a new task in the task list with a default set of values. The task will be associated with the current requirement.
- **Remove** – removes the task from this requirement without actually deleting the task
- **Refresh** – updates the list of tasks from the server, useful if other people are adding tasks to this requirement at the same time.
- **Filter / Apply Filter** – Applies the entries in the filter boxes to the list of tasks
- **Clear Filters** – Clears the current filter, so that all tasks associated with the current requirement are shown.
- **Edit** – Clicking the “[Edit](#)” button to the right of the task allows you to edit the task inline directly on this screen. Only columns visible will be editable.
- **Show/Hide Columns** – Allows you to choose which Task columns are visible

The system has a series of shortcuts that simplify the editing of requirements and tasks:

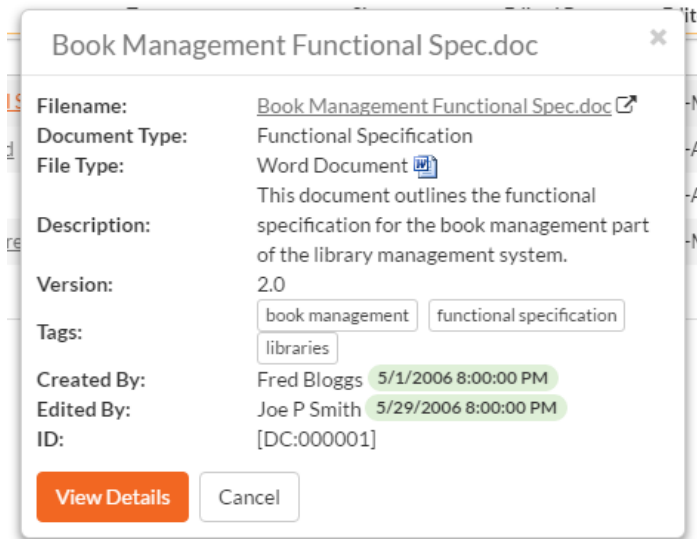
- If you create a new task on the requirements page, the priority, release/iteration and owner are automatically copied from the parent requirement. You can change these suggested values before clicking “[Save](#)”
- When you assign a release/iteration to a requirement, its status automatically changes to “Planned”
- When at least one task assigned to the requirement changes from “Not Started” to “In Progress”, the parent requirement automatically switches from “Planned” to “In Progress”
- When all the tasks under the requirement are completed, the parent requirement will switch to the “Completed” status.
- If you manually move a requirement that has *no associated tasks* from “Planned” to “In Progress”, the system will automatically generate one task under the requirement and use the requirement’s planned effort field to generate the task’s estimated effort.

## 4.2.7. Attachments

The attachment tab displays the list of documents, screenshots or web-links (URLs) that have been “attached” to the requirement. The documents can be in any format, though SpiraTeam® will only display icons for certain known types.

Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
<a href="#">Book Management Functional Spec.doc</a>	Functional Specification	285 KB	Joe P Smith	29-May-2006	Fred Bloggs	DC:1	Edit
<a href="#">Graphical Design Mockups.psd</a>	Screen Layout	1009 KB	Joe P Smith	30-Apr-2006	Joe P Smith	DC:13	Edit
<a href="http://www.inflectra.com">http://www.inflectra.com</a>	Functional Specification	0 KB	Fred Bloggs	30-Apr-2006	Fred Bloggs	DC:15	Edit
<a href="#">Book Management Screen Wireframe.ai</a>	Screen Layout	392 KB	Fred Bloggs	31-Mar-2006	Joe P Smith	DC:11	Edit

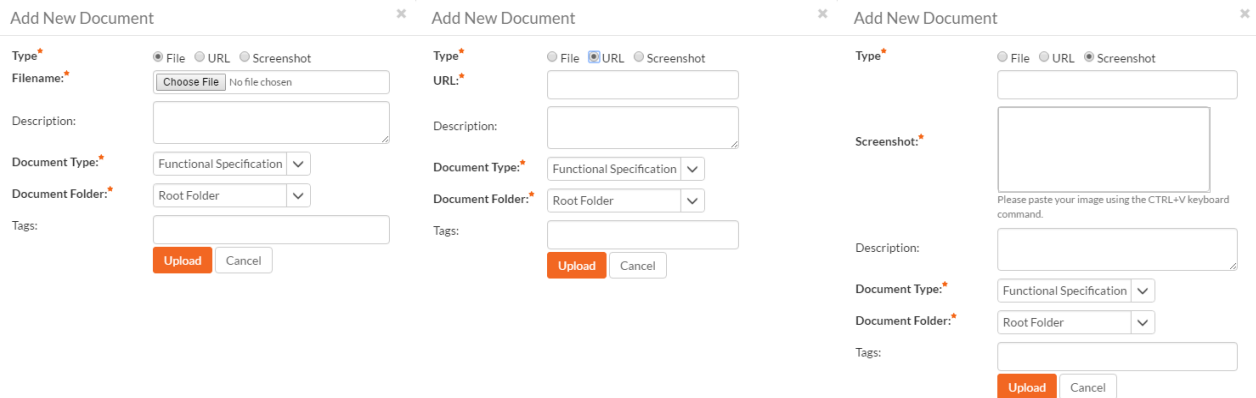
The attachment list includes the filename/URL that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip:



To actually view the document, click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document / web-page or prompt you for a place to save it on your local computer. To remove an existing attachment from a requirement, simply click the “**Remove**” button and the attachment will be removed from the list. Using the standard filter/sort options you can also sort and filter the list of attachments to make it more manageable.

If you are using SpiraPlan or SpiraTeam (but not SpiraTest) you can also choose to include file attachments stored in a linked version control system (e.g. Subversion, CVS, Perforce, etc.) by selecting the “Include Source Code Documents” option.

To attach a new document to the requirement, you need to first click the “**Add New**” button to display the new attachment dialog box:

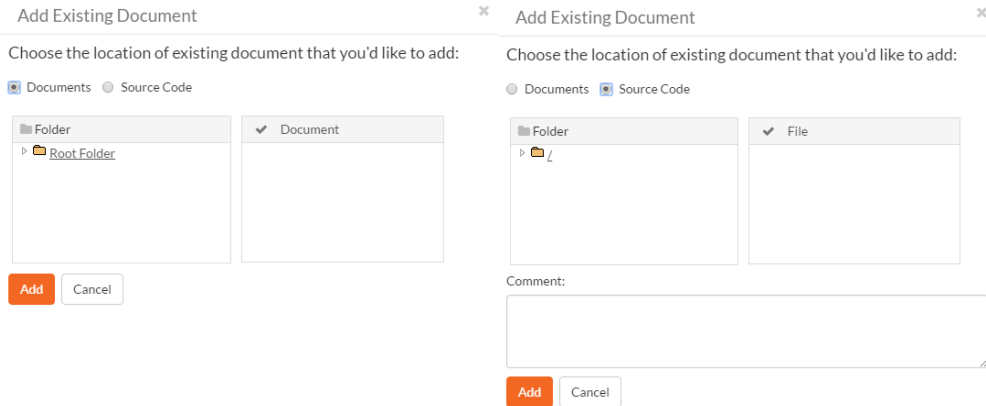


There are three different types of item that can be attached to a requirement:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the “**Upload**” button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the “**Upload**” button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “**Upload**” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the requirement. To do that, click on the “**Add Existing**” button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

#### 4.2.8. History

This tab displays the list of changes that have been performed on the requirement artifact since its creation. An example requirement change history is depicted below:

Refresh Filter Admin View

Displaying 1 - 2 out of 2 change(s).

Change ID	Change Date	Field Name	Old Value	New Value	Changed By	Change Type
12	2-May-2006	Status	In Progress	Developed	Fred Bloggs	Modified
4	4-Mar-2005	Status	Requested	In Progress	Joe P Smith	Modified

Show 15 rows per page

Displaying page 1 of 1

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “Admin View” hyperlink to revert any unwanted changes.

#### 4.2.9. Associations

This displays a list of any incidents, source code revisions or other requirements that are associated with this requirement:

Displaying 1 - 4 out of 4 association(s).

Type	Artifact Type	Name	Status	Creation Date	Creator	Comment	Project Name	ID	Edit
<input type="checkbox"/> Related-to	Incident	<a href="#">Cannot install system on Oracle 9i</a>	Open	13-Mar-2004	Fred Bloggs	This bug affects the requirement	Library Information System	[IN:5]	<input type="button" value="Edit"/>
<input type="checkbox"/> Related-to	Requirement	<a href="#">Ability to delete existing books in the system</a>	Developed	11-Mar-2004	Fred Bloggs	These two requirements are related	Library Information System	[RQ:6]	<input type="button" value="Edit"/>
<input type="checkbox"/> Related-to	Requirement	<a href="#">Creating a new book in the system</a>	Completed	4-Dec-2003	Fred Bloggs	This use case defines the steps for creating a book	Library Information System	[RQ:30]	<input type="button" value="Edit"/>
<input type="checkbox"/> Implicit	Incident	<a href="#">Cannot add a new book to the system</a>	Assigned	3-Nov-2003	Joe P. Smith	Test Run: Ability to create new book	Library Information System	[IN:7]	<input type="button" value="Edit"/>

Show 15 rows per page Displaying page 1 of 1

The requirements in this list are those a user has decided are relevant to the current one and has created a direct link between them. In the case of incidents, the association can be either due to the creator of an incident directly linking the incident to the requirement, or it can be the result of a tester executing a test-run and creating an incident during the test run. In this latter case, the check-box to the left of the association will be unavailable as the link is not editable.

Each association is displayed with the type of association (related-to, vs. a dependency), name of the artifact being linked-to, type of artifact (requirement, incident, etc.), the name of the person who created the association, and a comment that describes why the association was made. In the case of an indirect association due to a test run, the comment will contain the name of the test run.

In addition, when using SpiraPlan or SpiraTeam, the system automatically scans the source code repository for any revisions that are linked to this artifact.

You can perform the following actions on an association from this screen:

- **Delete** – removes the selected association to the other artifact. This will only delete the association, not the linked artifact itself.
- **Refresh** – updates the list of associations from the server, useful if other people are adding associations to this requirement at the same time.
- **Filter / Apply Filter** – Applies the entries in the filter boxes to the list of associations
- **Clear Filters** – Clears the current filter, so that all associations for the current requirement are shown.
- **Edit** – Clicking the ***Edit*** button to the right of the associations allows you to edit the association type and comment fields inline directly on this screen.

To create a new association, click the ***Add*** button to display the add association panel:

Select Artifact Type



If you know the ID of the requirement or incident you want to associate, you can enter its ID prefixed by the appropriate token (“RQ” for requirement or “IN” for incident):

Select Artifact Type ▾ IN9

<input checked="" type="checkbox"/> ID	Name	Project
<input type="checkbox"/> IN: 9	Editing the date on an author is clunky	Library Information System

Type: Related-to ▾

Comment:

Otherwise you should choose the Artifact Type (and Project if making a cross-project association):

Requirement ▾ All Packages ▾ Filter by name, or search by ID (e.g. RQ4)

<input checked="" type="checkbox"/> ID	Name	Project
<input type="checkbox"/> RQ: 1	Functional System Requirements	Library Information System
<input type="checkbox"/> RQ: 2	Online Library Management System	Library Information System
<input type="checkbox"/> RQ: 3	Book Management	Library Information System
<input type="checkbox"/> RQ: 5	Ability to edit existing books in the system	Library Information System
<input type="checkbox"/> RQ: 7	Ability to associate books with different subjects	Library Information System
<input type="checkbox"/> RQ: 8	Ability to associate books with different authors	Library Information System
<input type="checkbox"/> RQ: 9	Ability to associate books with different editions	Library Information System
<input type="checkbox"/> RQ: 10	Ability to completely erase all books stored in the system with one click	Library Information System
<input type="checkbox"/> RQ: 11	Ability to completely erase all books stored in the system with one click	Library Information System

Type: Related-to ▾

Comment:

You can narrow down your search by entering a keyword:

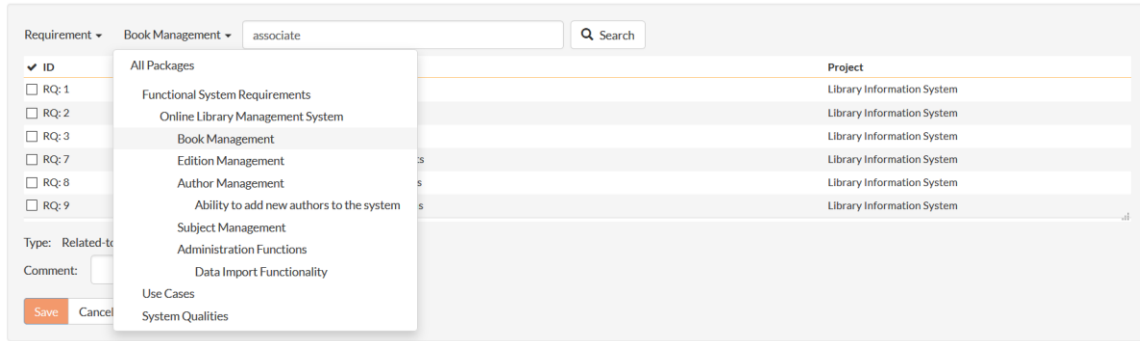
Requirement ▾ All Packages ▾ associate

<input checked="" type="checkbox"/> ID	Name	Project
<input type="checkbox"/> RQ: 1	Functional System Requirements	Library Information System
<input type="checkbox"/> RQ: 2	Online Library Management System	Library Information System
<input type="checkbox"/> RQ: 3	Book Management	Library Information System
<input type="checkbox"/> RQ: 7	Ability to associate books with different subjects	Library Information System
<input type="checkbox"/> RQ: 8	Ability to associate books with different authors	Library Information System
<input type="checkbox"/> RQ: 9	Ability to associate books with different editions	Library Information System
<input type="checkbox"/> RQ: 13	Author Management	Library Information System
<input type="checkbox"/> RQ: 18	Ability to associate authors with subjects	Library Information System

Type: Related-to ▾

Comment:

For requirements, you can also choose a package from the list to narrow down the results:



Once you have a list of artifacts, you should select the checkboxes of the items you want to associate with the current requirement and click the 'Save' button.

You can add a comment that explains the rationale for the association and choose the type of association being created:

- **Related-to:** this is used to specify that the two artifacts are simply related
- **Depends-on:** this is used to specify that the current artifact has a dependency on the one being linked to.

## 5. Test Case Management

This section outlines how the use-case / test-case management features of SpiraTest® and SpiraTeam® can be used to develop the business use-cases for the system, which specify how the different pieces of functionality are expected to work in practice. In addition, these use/test-cases form the basis of the business specification of the system when associated with the underlying requirements matrix. Typically when starting a new project:

- The requirements matrix is entered first
- Then the list of use-cases is developed to outline the key scenarios that need to be supported to implement the requirement
- Then the use-cases are fleshed out into full test-cases by adding the detailed test-steps with the expected result and suggested sample-data
- Finally the tests are grouped into test-sets so that they can be assigned to users in batches for execution and tracking.

However when migrating existing projects into SpiraTeam®, you may need to migrate the test-case list first, and then add the supporting requirements matrix afterwards.

### 5.1. Test Case List

When you click on the Testing > Test Cases link on the global navigation bar, you will initially be taken to the test case list screen illustrated below:

Name	Execution Status	Owner	Last Executed	Author	Status	Type	ID	Edit
Common Tests	Passed		30-Nov-2003					
Functional Tests	Failed		30-Nov-2003					
Regression Tests	Passed		30-Nov-2003					
Scenario Tests	Not Run							
Ability to create new author	Failed	Joe P Smith	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC-4	Edit
Ability to create new book	Passed	Fred Bloggs	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC-2	Edit
Ability to edit existing author	Blocked	Joe P Smith	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC-5	Edit
Ability to edit existing book	Caution	Fred Bloggs	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC-3	Edit
Ability to reassign book to different author	Passed	Joe P Smith	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC-6	Edit
Adding multiple new books	Not Run			Fred Bloggs	Draft	Scenario	TC-19	Edit
Adding new author and book	Not Run			Fred Bloggs	Draft	Scenario	TC-18	Edit
Adding new book and author to library	Not Run			Joe P Smith	Approved	Scenario	TC-13	Edit
Author management	Passed		30-Nov-2003	Joe P Smith	Ready for Test	Regression	TC-9	Edit
Book management	Passed		30-Nov-2003	Joe P Smith	Ready for Test	Regression	TC-8	Edit
Create Author	Not Run			Joe P Smith	Draft	Scenario	TC-20	Edit
Create Book	Not Run			Joe P Smith	Draft	Scenario	TC-21	Edit

The test case list consists of a hierarchical arrangement of the various test folders and test cases. The structure is very similar to the folder structure in Microsoft Windows® Explorer, and users will find this very familiar and intuitive to use. A folder tree is on the left hand side—with triangle icons to expand /

collapse each folder. Contents of the selected folder (the one marked in bold on the folder tree) are shown on the right hand side.

When you create a new project, this list will initially be empty, and you will have to use the “[New Test Case](#)” button to start adding test cases to the system. A new project will also not have any test folders—only the base “Root” folder will be visible. To add a test folder, you click the “[Add](#)” button at the bottom of the folder tree on the left.

The list shows all test folders (shown with a folder icon), and test cases (shown with a document icon) inside the currently selected folder. You can place test folders and test cases into test folders. All of the items in the list have a name, together with the most recent execution status (passed, failed or not-run), and owner, author, execution date, active flag and test case number. Clicking on a test case’s hyperlink will take you to the test case details page for the item in question (see section 5.2).

It is important to understand that only test cases are assigned a status themselves; the test folders instead display a test execution bar graph that illustrates the aggregate execution status of its child test-cases. Thus if the test folder contains two test cases, one of which passed, and one of which wasn’t run, the graph will display 50% green and 50% gray.

To determine the exact aggregate test folder execution status information, position the mouse pointer over the bar-chart, and the number of tests in each of the execution statuses (passed, failed, not-run, blocked, caution) will be displayed as a “tooltip”. Note that if you change the owner of a test folder, then all the child test cases will be assigned the same owner. This allows you to more easily associate entire folders to test cases to be executed by a specific user.

#### **5.1.1. Add a Test Case**

Click the “[New Test Case](#)” button will add a test case in the currently displayed folder (ie the one marked in bolder on the folder tree and also shown in the yellow information box). The new test case will be added at the bottom of the list.

Once the new test case has been inserted, the item is switched to “Edit” mode so that you can rename the default name and choose an owner and/or author. Note that all new test cases are initially set with an execution status of “Not Run”.

#### **5.1.2. Delete**

Clicking on the “[Delete](#)” button deletes all the test cases and/or test folders whose check-boxes have been selected. If any of the items are test folders, then the entire contents of that folder will also be deleted (as you would expect in Microsoft Windows® Explorer or OS X Finder).

### 5.1.3. Execute

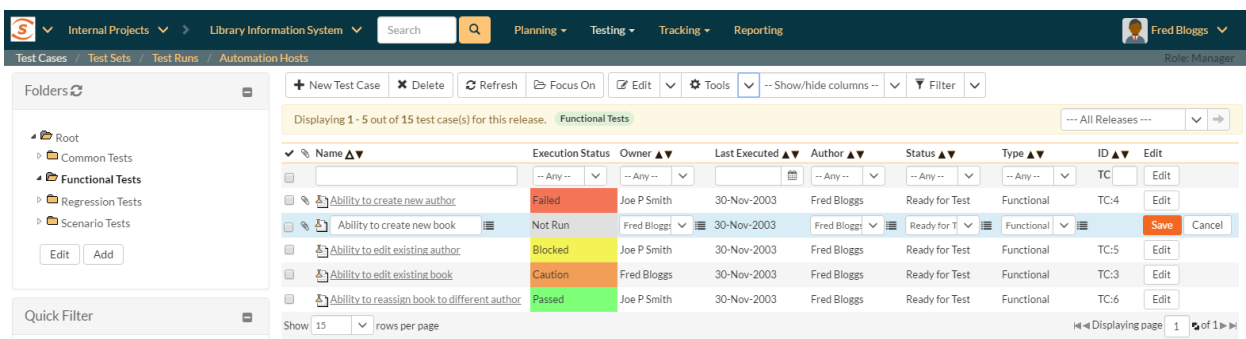
Clicking on the **Execute Tests** button (accessed from the “Tools” menu or context menu) executes all the test cases selected, together with all the test cases contained with any selected test folders. The test execution functionality of SpiraTeam® is explained in more detail in section 5.3.

### 5.1.4. Refresh

Clicking on the **Refresh** button simply reloads the test case list. This is useful as other people may be modifying the list of test cases at the same time as you, or executing specific test cases, and after stepping away from the computer for a short-time, you can click this button to make sure you are viewing the most current test case list for the project.

### 5.1.5. Editing a Test Case

Each test case in the list has an **Edit** button in its right-most column. When you click this button (or *double-click* on any of the cells in the row), you change the item from “View” mode to “Edit” mode. The various columns are made editable, and **Update** and **Cancel** buttons are displayed in the last column:



Name	Execution Status	Owner	Last Executed	Author	Status	Type	ID	Edit
Ability to create new author	Failed	Joe P Smith	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC:4	Edit
Ability to create new book	Not Run	Fred Bloggs	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC:5	Save Cancel
Ability to edit existing author	Blocked	Joe P Smith	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC:5	Edit
Ability to edit existing book	Caution	Fred Bloggs	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC:3	Edit
Ability to reassign book to different author	Passed	Joe P Smith	30-Nov-2003	Fred Bloggs	Ready for Test	Functional	TC:6	Edit

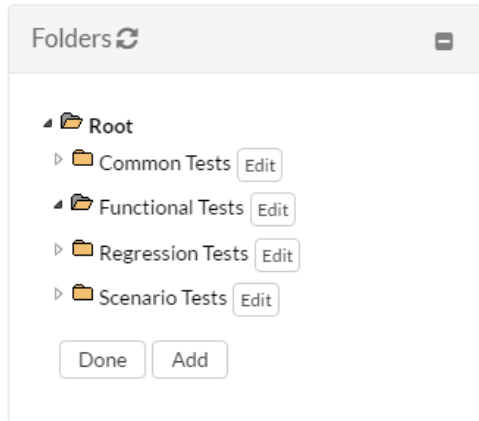
If you click **Edit** on more than one row, the **Update** and **Cancel** buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one **Update** button. Also, if you want to make the same change to multiple rows (e.g. to change the owner of five test cases from “Fred Bloggs” to “Joe Smith”), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the **Edit** button on the same row as the Filters (ie the topmost edit button) and it will switch all the selected items into edit mode.

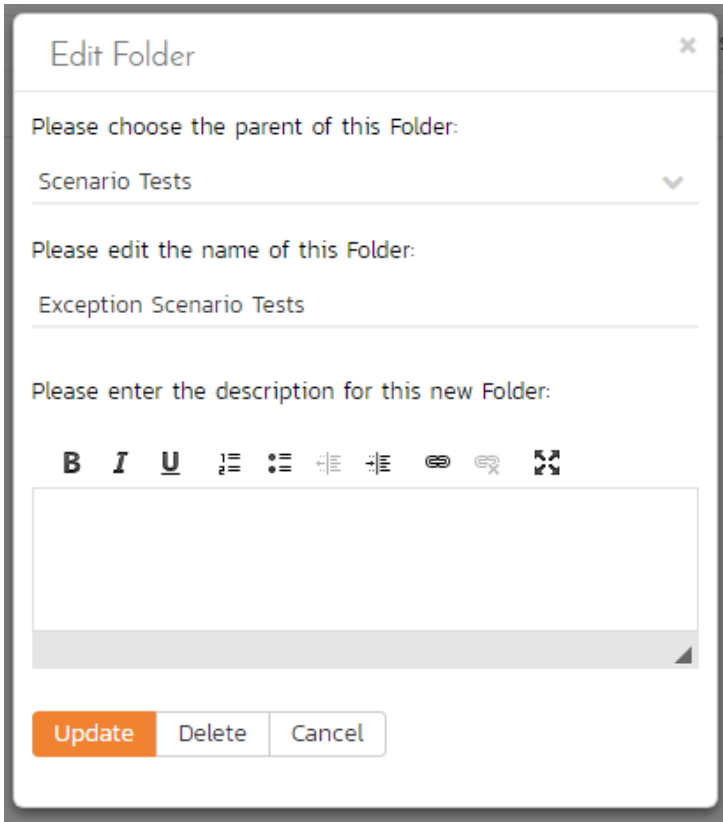
When you have made your updates, you can either click **Update** to commit the changes, or **Cancel** to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

### 5.1.6. Editing a Test Folder

Test folders shown on the right hand list pane do not have an **Edit** button. To edit a test folder, first click the **Edit** button at the bottom of the left hand folder tree. This will place the whole folder tree into edit mode—each folder will get a small “Edit” button of its own.



Clicking on the **Edit** button of the folder you want to edit will display a pop up dialog. This allows you to: move the folder into a new or different parent folder; edit the name of the folder; or add a more detailed description. Click **Update** to commit the changes, **Cancel** to revert back to the original information, or “Delete” to delete the folder (and all of its contents). Note that on clicking **Delete** a warning box will appear to make sure you don’t accidentally delete something.

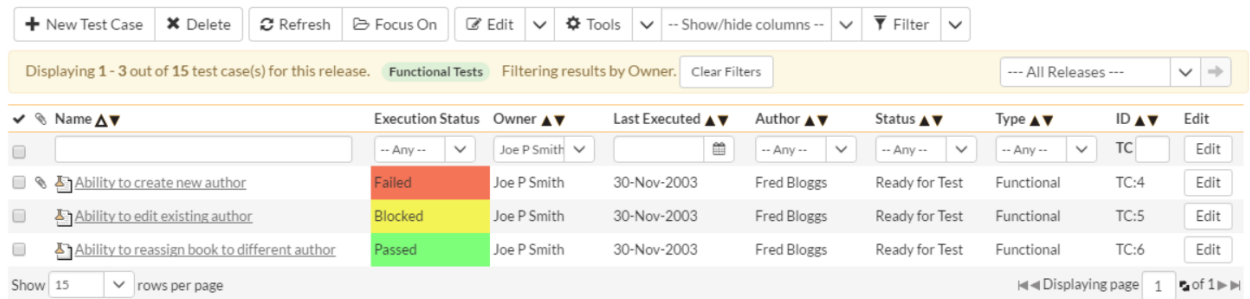


### 5.1.7. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the test case list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

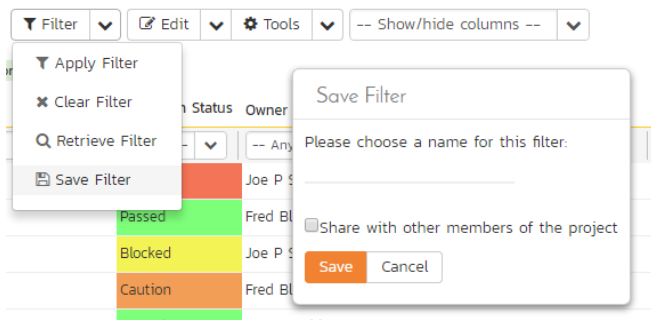
### 5.1.8. Filtering

You can easily filter the list of test cases as illustrated in the screen-shot below:



To filter the list by any of the displayed columns, you either choose an item from the appropriate drop-down list or enter a free-text phrase (depending on the type of field) then click “**Filter**” or press the <ENTER> key to apply the different filters. Note that the name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, test case numbers). In the screen-shot above, we are filtering on Owner = (None).

In addition, if you have a set of filters that you plan on using on a regular basis, you can choose the option Filter > Save Filter to add the current filter to the list of saved filters that appear on your ‘My Page’. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter:



Because the same test case can be run against more than one release, sometimes you want to see the execution information for the displayed test cases for different releases. If you select a release or iteration from the dropdown marked “All Releases” on the right above the table, then the execution information for that specific release will be displayed. If the dropdown is set to “all releases”, then it shows only the most recent execution information. In both cases, all test cases (as per any filter) are listed.

### 5.1.9. Copying Test Cases

To copy one or more test cases, simply select the check-boxes of the test cases you want to copy and then select the Edit > Copy Items menu option. This will copy the current test case selection to the clipboard. Then select the place where you want the test cases to be inserted and choose the Edit > Paste Items option.

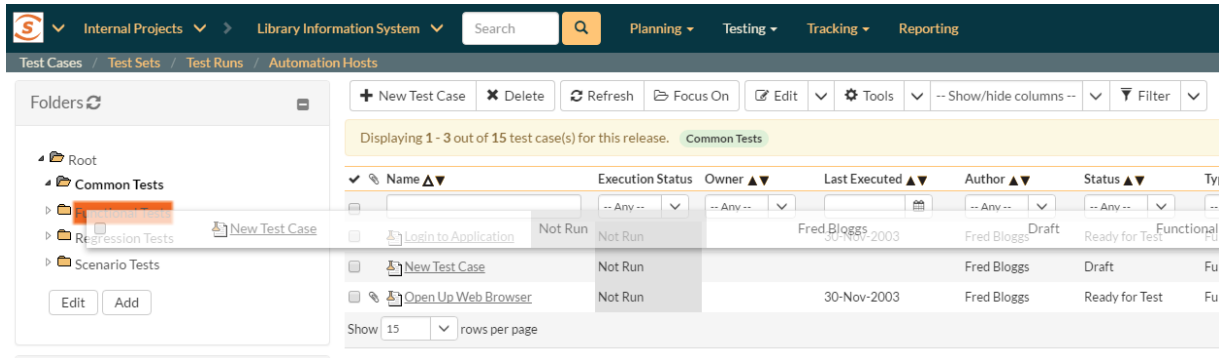
The test cases will now be copied to the destination you specified. The name of the copied test cases will be prefixed with “Copy of...” to distinguish them from the originals.

### 5.1.10. Moving Test Cases or Folders

There are two options for moving test cases or folders:



1. Click on the test case/folder you want to move in the right hand list and drag it to the folder in the left hand folder tree you want it moved to. The background of the new folder will change to show where it will be inserted:

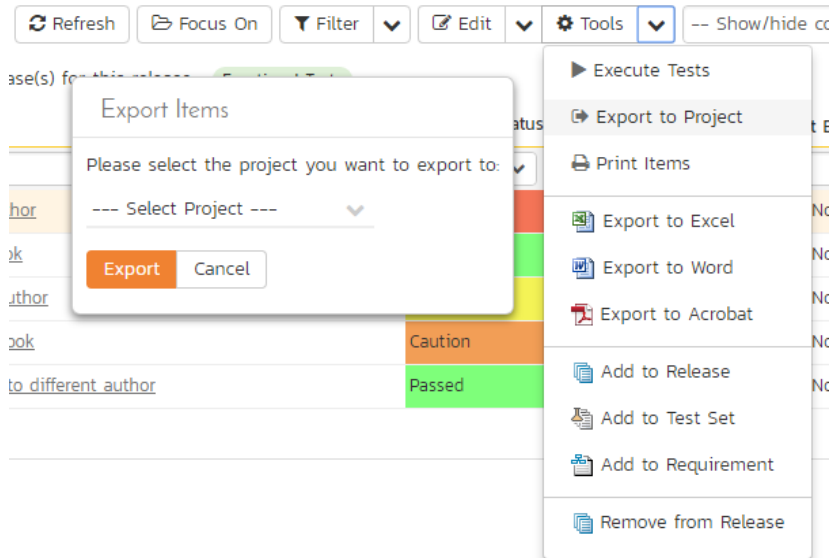


Once you have the test case/folder positioned at the correct place that you want it inserted, just release the mouse button. To move multiple items simply select their checkboxes and then drag-and-drop one of the selected items.

2. Alternatively you can simply select the check-boxes of the test cases you want to move and then select the Edit > Cut Items menu option. This will cut the current test selection to the clipboard. Then select the place where you want the test cases to be inserted and choose the Edit > Paste Items option. The test cases will now be moved into the destination specified.

### 5.1.11. Exporting Test Cases

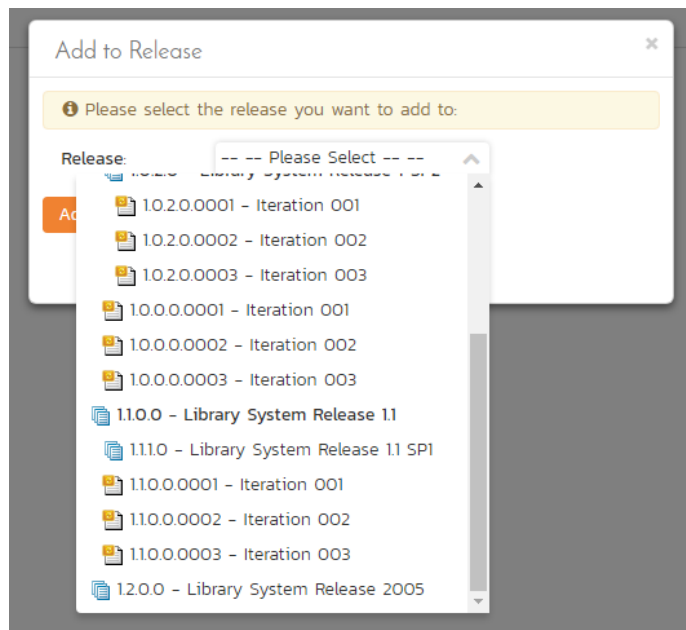
To export a test case or set of test cases from the current project to another project in the system, select the check-boxes of the test case(s) you want to export and then click Tools > **Export to Project**. This will bring up a list of possible destination projects:



Once you have chosen the destination project and clicked the “**Export**” button, the test cases will be exported from the current project to the destination project. Any file attachments will also be copied to the destination project along with the test cases.

#### 5.1.12. Adding Test Cases to a Release, Test Set or Requirement

To quickly add a series of test cases to a Release, Test Set or Requirement, select the check-boxes of the appropriate test cases and then click Tools > Add to Release / Test Set / Requirement. This will bring up a dialog box displaying either a list of available releases, test sets or requirements (depending on which option was chosen):



Once you have chosen the destination release / test set / requirement, clicking “**Add**” will add the selected test cases to the destination release / test set / requirement.

### 5.1.13. Viewing the Test Status for a Release

By default, when you view the list of test case cases, it will display an aggregate status for all releases of the project. I.e. the test list will include all the test cases in the system (regardless of which release they apply to) and the execution status will reflect the most recent test run – regardless of which release it was for.

To change the test case list to just display test cases and execution status for a particular release, change the release selected in the drop-down list located in the yellow information panel (on the right-hand side) from “All Releases” to a specific release:

The top screenshot shows a table with the following data:

Name	Execution Status	Owner	Last Executed	Author	Status
Author management	Passed		30-Nov-2003	Joe P Smith	Ready for Test
Book management	Passed		30-Nov-2003	Joe P Smith	Ready for Test
New Test Case	Not Run			Fred Bloggs	Draft

The bottom screenshot shows the same table filtered to 2 test cases:

Name	Execution Status	Owner	Last Executed	Author	Status	Type	ID	Edit
Author management	Not Run			Joe P Smith	Ready for Test	Regression	TC:9	Edit
Book management	Not Run			Joe P Smith	Ready for Test	Regression	TC:8	Edit

As illustrated in the example above, when the drop-down list is changed to select a specific release, the list of test cases is filtered to just those mapped to the release in question. In addition, the execution status for the test releases will only reflect test runs for that specific release (and any child iterations if applicable). As can be seen in our example, many test cases that have been run for other releases now show the “Not Run” status since they’ve not been run for this specific release.

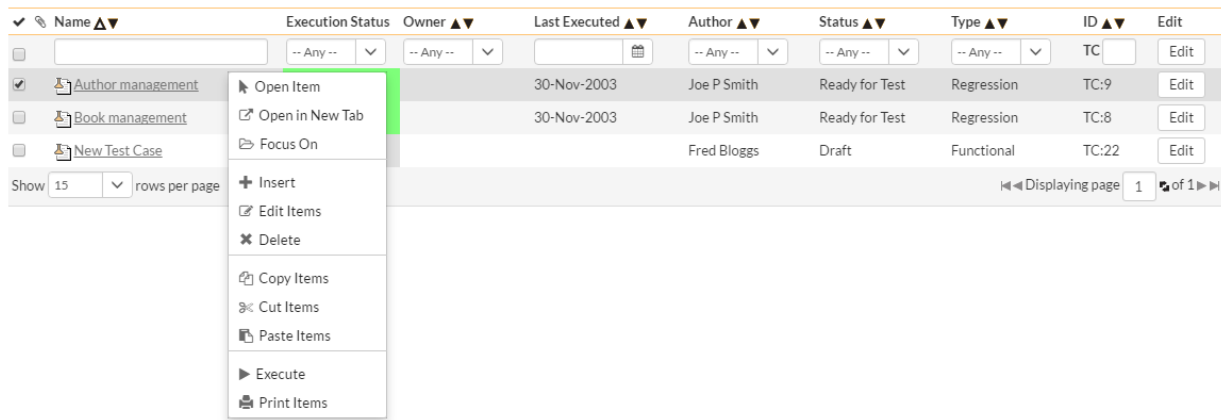
As a shortcut, when you select a specific release for viewing, subsequent execution of any of the test cases via the Tools > Execute Tests menu option will default the test run to the selected release.

### 5.1.14. Printing Items

To quickly print a single test case, test folder or list of test cases you can select the items' checkboxes and then click Tools > Print Items. This will create a printable report of the selected items in a new window.

### 5.1.15. Right-Click Context Menu

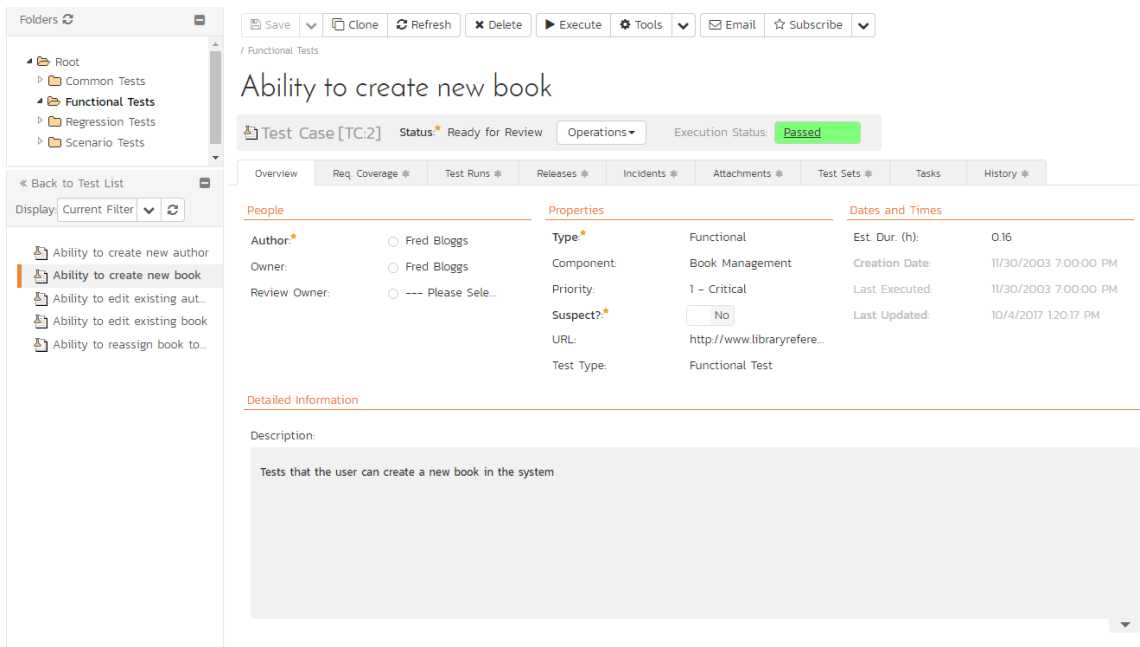
SpiraTeam® provides a shortcut – called the *context menu* - for accessing some of the most commonly used functions, so that you don't need to move your mouse up to the toolbar each time. To access the context menu, right-click on any of the rows in the test case list and the following menu will be displayed:



You can now choose any of these options as an alternative to using the icons in the toolbar.

## 5.2. Test Case Details

When you click on a test case item in the test case list described in section 5.1, you are taken to the test case details page illustrated below:



This page is made up of *three* areas;

1. the left pane displays the test case folders and list navigation;
2. the right pane's header, which displays: the operations toolbar; the editable name of the selected test case; and the info bar (with a shaded background), which also contains the workflow status transitions (see below); and
3. the right pane's tabbed interface with rich information related to the test case.

The navigation pane consists of a link that will take you back to the test case list, as well as a list of the peer test cases to the one selected. This latter list is useful as a navigation shortcut: you can quickly view the detailed information of all the peer test cases by clicking on the navigation links without having to first return to the test cases list page. The navigation list can be switched between three different modes:

- The list of test cases matching the current filter
- The list of all test cases, irrespective of the current filter
- The list of test cases assigned to the current user

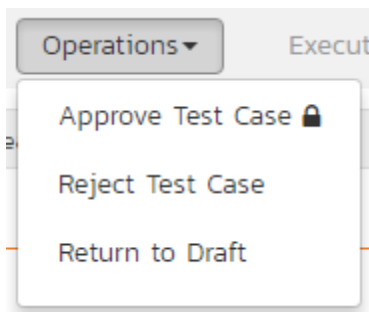
If you are editing an existing item, the fields that are available and the fields that are required will depend on your stage in its workflow. The types of change allowed and the email notifications that are sent will depend on how your project administrator has setup the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring workflows to meet their needs.

Depending on the user's role and whether they are listed as the owner or author of the test case, displayed in the info bar beneath the test case name is the current workflow status and an "operations" button which, when clicked, will show a set of allowed workflow operations.

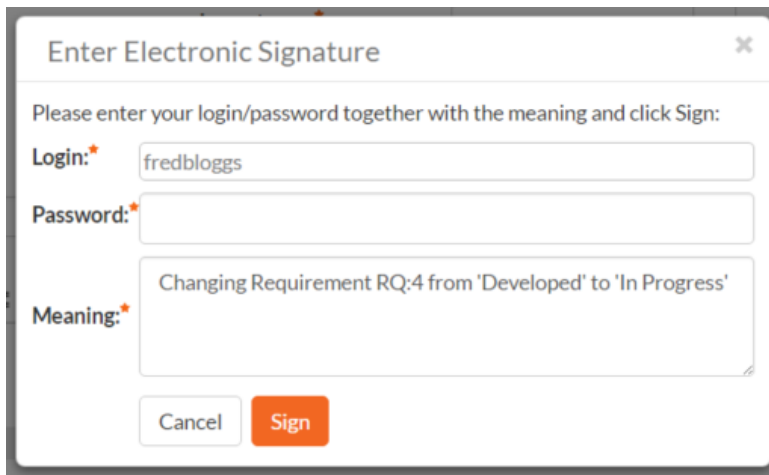
These workflow transitions allow the user to move the item from one status to another. For example when the test case is in the Ready for Review status, you will be given the options to:

- **Approve Test Case** – changes status to “Approved”
- **Reject Test Case** – changes the status to “Rejected”
- **Return to Draft** - changes the status to “Draft”

Please note that if digital signatures have been enabled for a particular workflow operation (and therefore a digital signature is required to confirm the status change. Workflow operations requiring a digital signature are marked with a padlock icon as in the example below:



On attempting to save changes made after clicking a workflow operation that requires a digital signature you will be presented with a popup similar to the one below (which is for a requirement):

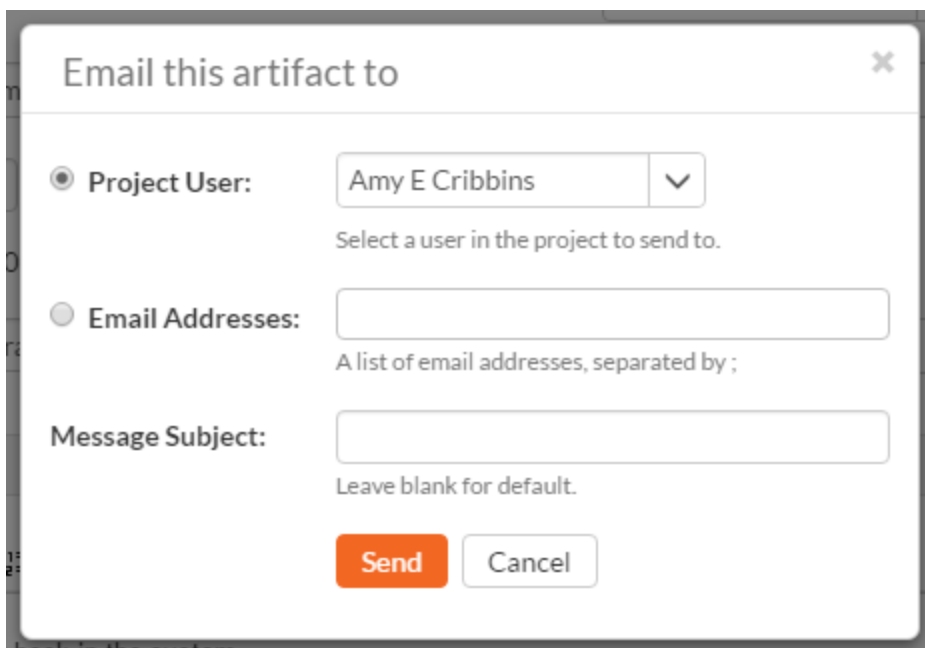


The top part of the right pane allows you to view and/or edit the name of the particular test case. Once you are satisfied with any changes made here or to the information below, click “**Save**”. Alternatively, if you click the dropdown you can either click “**Save and Close**” (which will take you back to the list page

after saving); or “[Save and New](#)” to commit the changes and immediately create another test case. In addition you can: create a replica of the current test case by clicking “[Clone](#)”; delete the current artifact by choosing “[Delete](#)”; discard any changes made by clicking “[Refresh](#)”; or print or export it using from the “[Tools](#)” dropdown.

Clicking the “[Execute](#)” button will immediately prepare the current test case for execution and then take you to the test execution screen (see section 5.4 below)

Using the “[Email](#)” button on the toolbar, you can send an email containing details of the test case by either specifying an email address or another user on the system:



The screenshot shows a dialog box titled "Email this artifact to" with a close button in the top right corner. It features three radio buttons for selection: "Project User:" (which is selected), "Email Addresses:", and "Message Subject:". The "Project User:" field displays "Amy E Cribbins" and includes a dropdown arrow. Below this field is the instruction "Select a user in the project to send to." The "Email Addresses:" field is an empty text box with the instruction "A list of email addresses, separated by ;" below it. The "Message Subject:" field is also an empty text box with the instruction "Leave blank for default." below it. At the bottom of the dialog are two buttons: "Send" (in orange) and "Cancel" (in white with a grey border).

You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user. The content of the email is specified in the System Administration – Notification Templates.

To be notified of any changes made to the current artifact via email, click the “[Subscribe](#)” button. If you already subscribed, the button will instead let you “[Unsubscribe](#)” to stop receiving emails about that particular artifact. Depending on your role, you may also see a dropdown arrow to the right of this button. This will let you subscribe others in the project to this artifact

The lower part of the right pane can be switched between *eight* different views by clicking the appropriate tab. Initially the pane will be in “Overview” mode, but it can be switched to “Requirements Coverage”, “Test Runs”, “Releases”, “Incidents”, “Attachments”, “History”, and “Test Sets” modes if so desired. Each of these views is described below.

### 5.2.1. Overview - Details

The Overview tab is divided into a number of different sections. Each of these can be collapsed or expanded by clicking on the title of that section. This tab displays the fields, detailed information, and comments associated with the test case.

The top part of this tab displays the various standard fields and custom properties associated with the test case. Fields (both standard and custom) are grouped under the collapsible headings (marked by orange text and underline) in the screenshot below. For instance, all fields regarding dates are grouped together in the “Dates and Times” area.

Overview	Req. Coverage *	Test Runs *	Releases *	Incidents *	Attachments *	Test Sets *	Tasks	History *
<u>People</u>			<u>Properties</u>			<u>Dates and Times</u>		
Author:*	<input type="radio"/> Fred Bloggs	Type:*	Functional		Est. Dur. (h):	0.16		
Owner:	<input type="radio"/> Fred Bloggs	Component:	Book Management		Creation Date:	11/30/2003 7:00:00 PM		
Review Owner:	<input type="radio"/> --- Please Sele...	Priority:	1 - Critical		Last Executed:	11/30/2003 7:00:00 PM		
		Suspect?*	<input type="button" value="No"/>		Last Updated:	10/4/2017 12:017 PM		
		URL:	http://www.libraryrefere...					
		Test Type:	Functional Test					

The Detailed Information section contains the long, formatted description of the test case, as well as any rich text custom fields. You can enter rich text or paste in from a word processing program or web page. Clicking on the shaded areas of one of these detailed fields will display the rich text toolbar.

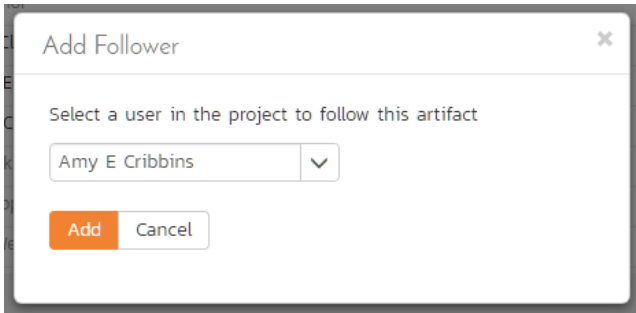
The **Suspect** flag is automatically set on an approved test case, when one of the requirements linking to it changes. This lets you quickly find all the test cases impacted by a specific requirement change. For this to happen the requirement needs to be in an Accepted or later status (i.e. not Rejected, Rejected, Under Review, Obsolete) and the test case needs to be an approved status (i.e. not Draft, Obsolete, Rejected).

#### 5.2.1.1. Followers

Using the “**Subscribe**” button on the toolbar, you can quickly follow the item, and receive updates on certain changes to it. Depending on your role, you may also see a dropdown to this button, which let’s you add another project member as a follower to this item.

Email

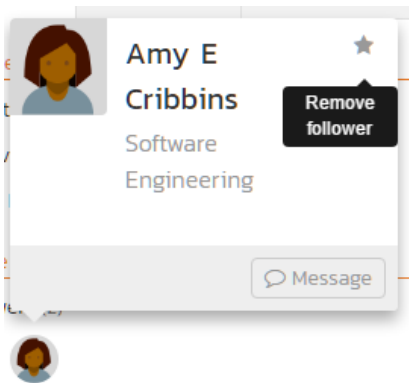




You can also quickly see who is following an incident under the “People” section in the Overview tab.



To view information about the follower, or to unfollow them from the item, hover over their avatar to display a user profile card.



### 5.2.2. Overview - Test Steps

This view displays the name of the test case together with all the defined test steps that a tester would need to perform to verify that the functionality works as expected. The list of test steps displays the position number, the description, the expected result, some suggested sample data and the most recent execution status of the individual test step:

Test Steps

<input type="checkbox"/>	Step #	Description	Expected Result	Sample Data	Execution Status	ID	Edit
<input type="checkbox"/>	Step 1	<a href="#">Call 'Login to Application' (TC17)</a>		browserName: Internet Explorer login: librarian password: librarian	N/A	TS:1	Edit
<input type="checkbox"/>	Step 2	User clicks link to create book	User taken to first screen in wizard		Passed	TS:2	Edit
<input type="checkbox"/>	Step 3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	Passed	TS:3	Edit
<input type="checkbox"/>	Step 4	User chooses book's genre and sub-genre from list	User sees screen displaying all entered information	Play, Tragedy	Passed	TS:4	Edit
<input type="checkbox"/>	Step 5	User clicks submit button	Confirmation screen is displayed		Passed	TS:5	Edit

Show 15 rows per page      Displaying page 1 of 1

Note: Test steps that are marked with a hyperlink and test case icon (e.g. “Call Login to Application” in the screen shot above) are in fact *linked test cases*. Linked test cases are a useful way of reusing existing test steps from other test cases. For example if you want to have a set of steps be in more than one test case (e.g. a login step) then you would create a separate test case just containing these steps, then have all the other test cases just link to it. This avoids the need to have duplicate test steps throughout the project.

If you click on the step number hyperlink (e.g. Step 2) you will be taken to the test step details page which allows you to perform additional editing of a specific test step as well as attach documents, associate pre-existing incidents and view the change history.

### 5.2.2.1. Insert Step

Clicking on the “[Insert Step](#)” button inserts a new test step *before* the currently selected (by means of the check-box) test step. Clicking the “[Insert Step](#)” button without selecting a test step will insert a new step at the end of the list. When a new step is inserted, the fields are displayed in “Edit” mode, so the description, expected result and sample data fields are editable, allowing you to enter the data:

Test Steps

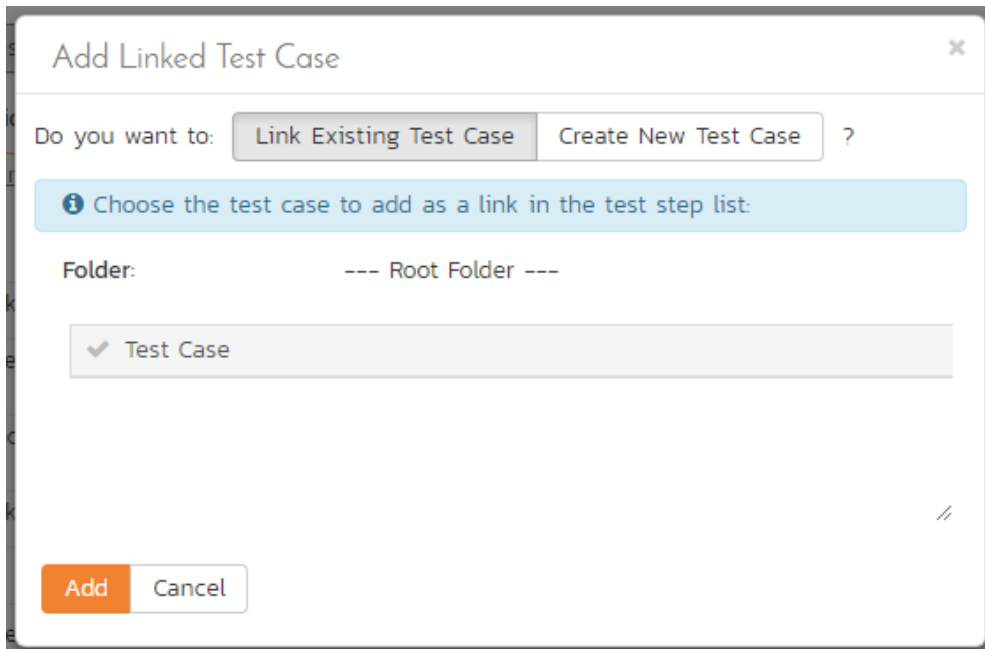
<input type="checkbox"/>	Step #	Description	Expected Result	Sample Data	Execution Status	ID	Edit
<input type="checkbox"/>	Step 1	<a href="#">Call 'Login to Application' (TC17)</a>		browserName: Internet Explorer login: librarian password: librarian	N/A	TS:1	Edit
<input type="checkbox"/>	Step 2	User clicks link to create book	User taken to first screen in wizard		Passed	TS:2	Edit
<input type="checkbox"/>	Step 3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	Passed	TS:3	Edit
<input type="checkbox"/>	Step 4	User chooses book's genre and sub-genre from list	User sees screen displaying all entered information	Play, Tragedy	Passed	TS:4	Edit
<input type="checkbox"/>	Step 5	User clicks submit button	Confirmation screen is displayed		Passed	TS:5	Edit
<input type="checkbox"/>	Step 6	<input type="text"/>	<input type="text"/>	<input type="text"/>	Not Run	TS:52	Save and New Save Cancel

Show 15 rows per page      Displaying page 1 of 1

Once you have entered the necessary information, you can click either “[Save and New](#)” or “[Save](#)” to commit the changes. If you choose “[Save and New](#)” another new row will be inserted which is useful if you intend on entering lots of rows at once, whereas clicking “[Save](#)” will commit only the current row.

### 5.2.2.2. Insert Link

Clicking on the “[Insert Link](#)” button brings up the following dialog box that allows you to either choose an existing test case to be inserted or create a new test case and step with parameters:



When linking an existing test case, first select its parent folder from the dropdown. Then select the name of the test case you want to insert as a link from the list. If the test case has declared parameters (see the section on Parameters below for more details) you will be given a list of parameters that needed to be filled out.

You need to fill out the values of the parameters for the linked test case and then click the “[Add](#)” button to complete the operation. The system will then insert the test case as a link just before the currently selected test step. If no existing test step was selected, the link will be added at the end of the test step list.

If you want to create a test step with specific parameters and parameter values, you can do so by clicking the “[Create New Test Case](#)”. This will change the dialog to one where you can assign a folder, name, and parameters to a new test case. On clicking the “[Add](#)” button: the new test case is created; a test step is created within that new test case; the parameters specified in the dialog are assigned to that test step,

with the values set as the defaults for the step; and the new test case is added as a linked test case in the list of test steps.

Do you want to:   ?

**i** Please choose the folder and name for the new linked test case.

Folder: --- Root Folder ---

Name:\*

Enter Parameters

Name	Value
<input <="" td="" type="text" value="\${"/> <td><input <="" td="" type="text" value="}"/></td>	<input <="" td="" type="text" value="}"/>

### 5.2.2.3. Delete

Clicking on the “**Delete**” button deletes the currently selected test steps, and reorders the test step position numbers to close any gaps in numbering.

### 5.2.2.4. Clone

Clicking on the “**Clone**” button makes a duplicate of the current test step or linked test case and inserts the copied version directly above the original one.

### 5.2.2.5. Refresh

Clicking on the “**Refresh**” button simply reloads the list of test steps. This is useful if other people are making changes to the test list and you want to make sure that you have the most current version.

### 5.2.2.6. Show / Hide Columns

By default the test step list screen will display the Description, Expected Result and Sample Data fields. However the Expected Result and Sample Data fields are optional and can be hidden if necessary to

make more space. If you have configured custom properties for test steps, you can use the Show/Hide features to display one or more of your custom properties instead. These fields will then be editable in this grid-view.

### 5.2.2.7. Editing Test Steps

To modify an existing Test Step you simply need to click on the **Edit** button to the right of the step, or just *double-click* on the cells in the row. That will switch the selected row into Edit mode. The various columns are turned into editable text-boxes, and **Save** and **Cancel** buttons are displayed in the last column:

Step #	Description	Expected Result	Sample Data	Execution Status	ID	Edit
Step 1	Call 'Login to Application' (TC17)		browserName: Internet Explorer login: librarian password: librarian	N/A	T5.1	Edit
Step 2	User clicks link to create book	User taken to first screen in wizard		Passed	T5.2	Save Cancel
Step 3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	Passed	T5.3	Edit
Step 4	User chooses book's genre and sub-genre from list	User sees screen displaying all entered information	Play, Tragedy	Passed	T5.4	Edit
Step 5	User clicks submit button	Confirmation screen is displayed		Passed	T5.5	Edit

If you click **Edit** on more than one row, the **Save** and **Cancel** buttons are only displayed on the first row, and you can make changes to all the editable rows and then save the changes by clicking the one **Save** button. Also, if you want to make the same change to multiple rows, you can click on the **fill** icon to the right of the editable item, which will propagate the new value to all editable items in the same column. When you have made your changes, you can either click **Save** to commit the changes, or **Cancel** to revert back to the original information.

### 5.2.2.8. Editing Test Links

To modify an existing Test Link you simply need to click on the **Edit** button to the right of the step, or double click on the cells in the row. That will open up the special dialog box used for editing the parameter values associated with a specific linked test case:

Dialog box titled "Edit Linked Test Case Parameters" with a close button (X) in the top right corner. Below the title bar is a light blue instruction bar: "Please fill out the parameters for this linked test case:". The main area contains four input fields: "browserName:" with "Internet Explorer", "login:" with "librarian", "operatingSystem:" (empty), and "password:" with "librarian". At the bottom are "Save" and "Cancel" buttons.

This allows you to edit the parameters being passed from the current test step to the linked test case without having to recreate the test link from scratch. To commit the change click "**Save**" to close the dialog box, or click "**Cancel**" to revert back to the original information.

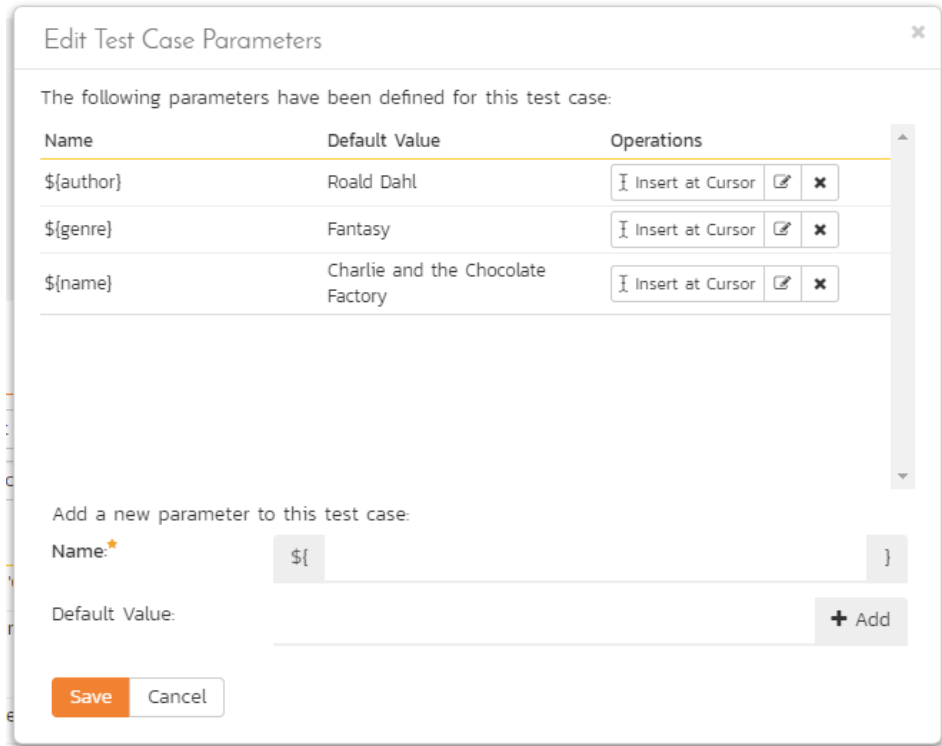
#### 5.2.2.9. Moving Test Steps

To move test steps in the list, click on the row you want to move and drag it where you want it moved to within the list of test steps. An empty space will appear to show you where it will be inserted.

#### 5.2.2.10. Parameters

Test cases can have parameters associated with them. This enables one test case to be called several times by another test case (as a link) and have different parameters passed in each case, making the operation different. E.g. you could have a generic "login to application" test case that others call as an initial step, which could be provided with different login information depending on the calling test case.

To view / change the parameters associated with the current test case, click on the "**Edit Parameters**" button in the toolbar and the list of current parameters will be displayed:



The list of existing parameters is displayed in a list. Beneath this, is a form where you can add a new parameter and default value (used when the test case is run directly rather than being called by another test case). You can delete an existing parameter or copy the parameter token to your computer's clipboard. If you want to paste the parameter token onto the current page (say into a specific test step), position the cursor where you want and click "***Insert at Cursor***". This is a quick way to include the parameter and then have it converted into the parameter value during test execution.

### 5.2.3. Overview - Automation

The Automation section displays any automated test scripts associated with the current test case. There are three types of automated test:

- **Attached** – this is when SpiraTeam physically stores the test script as an attachment in the system. This is only available for test automation tools that store their test scripts as plain text files. Examples of such tools are Selenium-RC and Squish.
- **Linked** – this is when SpiraTeam stores the location of the test script stored on the automation host itself or on an external network drive.
- **Repository** – This is a special option only available when using Rapise™, the test automation system from Inflectra. This allows you to store an entire folder of automated test script files in SpiraTeam and have them linked to the test case.

The screenshot below illustrates a sample Rapise automated test script attached to a test case:

Automation

**i** This section defines the automated test script associated with this test case.

Script Type\*  Attached  Linked  Repository

Automation Engine: Rapise      Version: 1.0      Document Type: Functional Specification  
 Filename: CreateNewBook.sstest      Document Folder: CreateNewBook

Test Script: <> Edit Parameters

```

Project File: CreateNewBook.sstest
Script Path: CreateNewBook.js
User Functions Path: CreateNewBook.user.js
Objects Path: CreateNewBook.objects.js
  
```

The automation screen includes the following fields that you should populate when using SpiraTeam® to store an automated test script:

- **Automation Engine** – this should be the name of the test automation engine that the test script should be executed with. This list is populated by a system administrator using the administration section of the application (as described in the *SpiraTeam Administration Guide*)
- **Script Type** – This should be set to either “attached” or “linked”. If you choose to attach the test script, the large text box at the bottom will be enabled, allowing you enter/edit the test script directly in SpiraTeam. If you choose linked, the test script is stored externally and SpiraTeam just stores a reference to it. The “repository” option is never selectable within SpiraTeam and will be automatically set by Rapise when it attaches a test script to the test case.
- **Filename** – If you are attaching the test script to the test case then this field just needs to contain the filename of the test script (no folders or path needed), whereas if you are choosing to link the test script, you need to follow the exact format that will be expected by the test automation engine. For details, please refer to the specific test automation engine in the *SpiraTest/Team Automated Test Integration Guide*.
- **Document Type** - This should be set to the document type that you want the test script associated with.
- **Document Folder** - This should be set to the document folder that you want the test script to be stored in. Note that if the script type is repository then the folder is set automatically and cannot be edited by the user.
- **Version** – This should contain the version number of the test script.



- **Test Script** – If you are attaching a test script, this should contain the actual program code for executing the test script. The language and syntax will be dependent on the test automation engine being used. If you are linking the test script, this section will be disabled.
- **Parameters** – You can enter the various test case parameters by clicking on this hyperlink. Most of the automation tools that SpiraTeam integrates with will support the passing of parameter values from SpiraTeam to the automation tool.

### 5.2.4. Overview - Comments

The Comments section allows users to add and view discussions related to the Test Case:

The screenshot shows the 'Comments' section of a test case. At the top, there are two buttons for sorting: 'newest first' (selected) and 'oldest first'. Below this, three comments are listed, each with a user profile picture, name, and timestamp. The first comment is from Fred Bloggs on Wednesday, November 19, 2003 7:00:00 PM, saying 'Thanks, appreciate it!'. The second is from Joe P Smith on Monday, November 10, 2003 7:00:00 PM, saying 'OK will make sure that we do.'. The third is from Fred Bloggs on Sunday, November 9, 2003 7:00:00 PM, saying 'We need to add a better definition of the pre-conditions and post-conditions'. Below the comments is a rich text editor with a toolbar containing options for Format, Font, Size, Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Quote, Unquote, Link, Unlink, Image, Table, Table Border, Table Cell, Table Row, Table Column, Table Merge, Table Split, and Source. At the bottom of the editor is an orange 'Add Comment' button.

Existing comments are displayed by date (either newest-first or oldest-first) above the text box. To add a comment to the Test Case, enter your text into the textbox, then click the “**Add Comment**” button.

### 5.2.5. Requirements Coverage

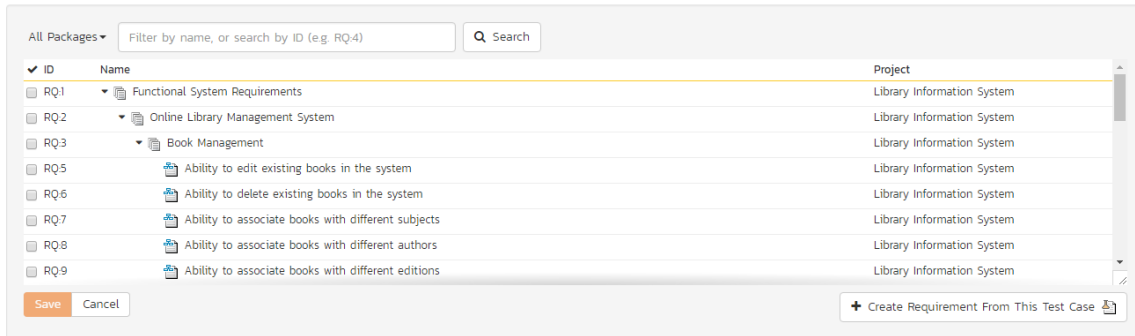
This tab displays the requirements coverage information for the test case in question:

The screenshot shows the 'Req. Coverage' tab in SpiraTeam. The navigation bar includes tabs for Overview, Req. Coverage (selected), Test Runs, Releases, Incidents, Attachments, Test Sets, Tasks, and History. Below the navigation bar are buttons for '+ Add', 'x Remove', 'Refresh', and 'Filter'. The main content area displays a table of requirements coverage information. The table has columns for Type, Name, Status, Importance, Project Name, and ID. The table shows two rows of requirements: 'Creating a new book in the system' (Status: Completed, Importance: 1 - Critical) and 'Ability to add new books to the system' (Status: Developed, Importance: 1 - Critical). The table also shows a 'Show 15 rows per page' option and a 'Displaying page 1 of 1' indicator.

Type	Name	Status	Importance	Project Name	ID
Use Case	<a href="#">Creating a new book in the system</a>	Completed	1 - Critical	Library Information System	RQ30
Feature	<a href="#">Ability to add new books to the system</a>	Developed	1 - Critical	Library Information System	RQ4

The table shows the requirements, if any, mapped to this test case. Clicking on the hyperlinked names will jump you to the details screen for the item in question.

To map the test case to a new requirement, click the **“Add”** button to display the add association panel. You can search by the ID (if known) prefixed with the appropriate token (e.g. “RQ:4” to search for requirement 4). You can also browse by package, or search by name. Select the requirements you want and then click the **“Save”** button”.

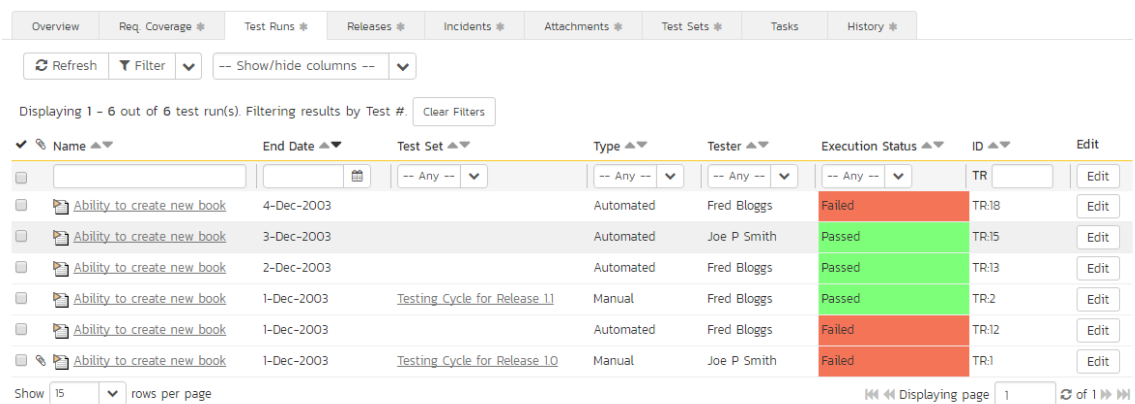


From the same add association panel there is a short to **“Create Requirement from This Test Case”**. This button will create a new requirement in the list of covered requirements that will be automatically linked to this test case. This is useful when you have created a new test case and want to generate an initial placeholder requirement to be fleshed-out later.

Finally, to remove coverage for this test case, select any of the added requirements (those in the bottom table) and click the **“Remove”** button.

## 5.2.6. Test Runs

This view displays the name of the test case together with a list of the previous execution runs that the test case has been put through. Each test run is listed together with the date of execution, the name of the test case, the name of the test set (if applicable), the name of the tester, the release/version of the system that the test was executed against, the overall execution status for the test case in that run and a link to the actual test run details (see section 5.6). In addition, you can choose to display any of the custom properties associated with the test run.



The “show/hide columns” drop-down list allows you to change the fields that are displayed in the test run list as columns. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. The displayed columns can be any standard field or custom property.

You can also filter the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.

### 5.2.7. Releases

This tab displays the name of the test case together with the release mapping information for the test case in question. It functions in a similar way to the Test Coverage tab described above: the table at the bottom of the panel shows the releases, if any, mapped to this test case. Clicking on the hyperlinked names will jump you to the details screen for the item in question. You can search for and add releases to this list using the “**Add**” button, or remove them using the “**Remove**” button.

✓ Name ▲▼	Type ▲▼	Version # ▲▼	Status ▲▼	Project Name ▲▼	ID ▲▼
<input type="checkbox"/> <a href="#">Library System Release 1</a>	Major Release	1.0.0.0	Completed	Library Information System	RL1
<input type="checkbox"/> <a href="#">Library System Release 1 SP1</a>	Minor Release	1.0.1.0	Completed	Library Information System	RL2
<input type="checkbox"/> <a href="#">Library System Release 1 SP2</a>	Minor Release	1.0.2.0	Completed	Library Information System	RL3
<input type="checkbox"/> <a href="#">Library System Release 1.1</a>	Major Release	1.1.0.0	In Progress	Library Information System	RL4
<input type="checkbox"/> <a href="#">Iteration 001</a>	Iteration	1.1.0.0.001	In Progress	Library Information System	RL17
<input type="checkbox"/> <a href="#">Iteration 002</a>	Iteration	1.1.0.0.002	In Progress	Library Information System	RL18
<input type="checkbox"/> <a href="#">Iteration 003</a>	Iteration	1.1.0.0.003	In Progress	Library Information System	RL19

Show 15 rows per page      Displaying page 1 of 1

### 5.2.8. Incidents

This tab displays the list of incidents associated with the current test case. The incidents have either been created during an execution of the test case (and are thereby linked to one of the test runs) or manually linked to one of the test steps in the test case.

Name	Type	Status	Priority	Detected By	Creation Date	Owner	Progress
<a href="#">Cannot add a new book to the system</a>	Bug	Assigned	1 - Critical	Joe P Smith	3-Nov-2003	Joe P Smith	<div style="width: 100%; height: 10px; background-color: green;"></div>

Each incident is listed together with the type, status, priority, name, owner, detector, detection date and a link to the actual incident details. You can customize the fields that are displayed using the “Show/Hide Columns” option. In addition, you can perform the following operations:

- **Refresh** – updates the list of incidents from the server, useful if other people are adding incidents to this release at the same time.
- You can also **filter** the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.
- **Edit** – Clicking the “**Edit**” button to the right of the incident allows you to edit the incident inline.

### 5.2.9. Attachments

In this tab, the main pane displays the list of documents that have been “attached” to the test case. The documents can be in any format, though SpiraTeam® will only display an icon for certain known types.

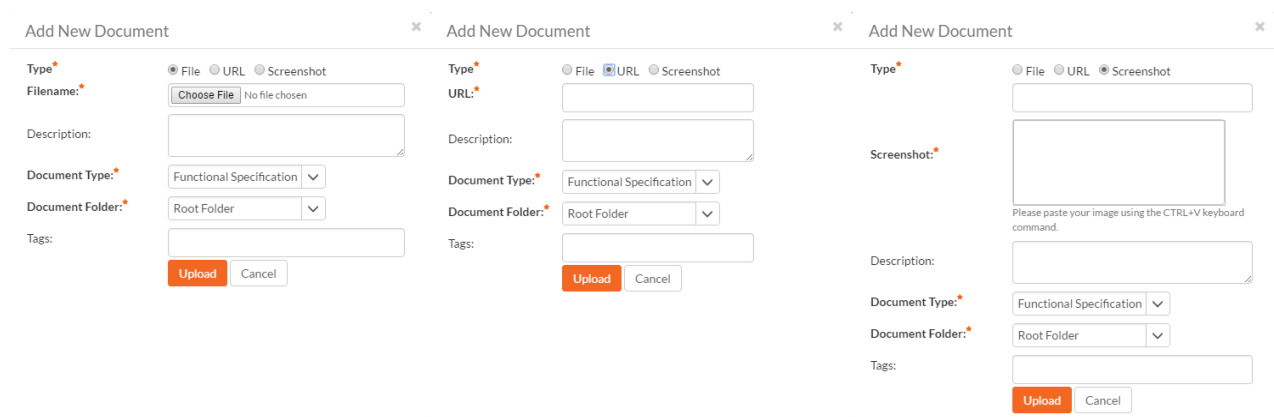
Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
<a href="#">Sequence Diagram for Book Mgt.pdf</a>	UML Diagram	35 KB	Joe P Smith	9-May-2006	Fred Bloggs	DC.7	<a href="#">Edit</a>

The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a

place to save it on your local computer. To delete an existing attachment from a test case, simply click the **“Remove”** button and the attachment will be removed from the list.

To attach a new document to the test case, you need to first click the **“Add New”** link to display the new attachment dialog box:

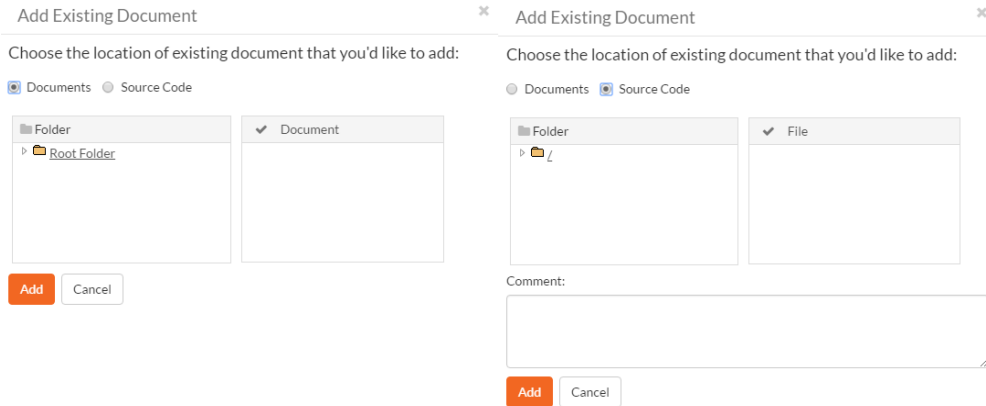


There are three different types of item that can be attached to a test case:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the **“Upload”** button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the **“Upload”** button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click **“Upload”** to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the test case. To do that, click on the **“Add Existing”** button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

## 5.2.10. History

In this tab, the main pane displays the list of changes that have been performed on the test case artifact since its creation. An example test case change history is depicted below:

Change ID	Change Date	Field Name	Old Value	New Value	Changed By	Change Type
60	4-Oct-2017	Status	Ready for Test	Ready for Review	System Administrator	Modified
11	2-May-2006	[Step] Expected Result	User taken to first screen	User taken to next screen in wizard	Fred Bloggs	Modified
9	2-May-2006	Name	Library System v1.0.0	Library System Release 1	Fred Bloggs	Modified
3	4-Mar-2005	[Step] Expected Result		User taken to first screen	Joe P Smith	Modified
2	4-Mar-2005	Owner		Fred Bloggs	Joe P Smith	Modified

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “[Admin View](#)” button to navigate to where you can revert any unwanted changes.

### 5.2.11. Test Sets

In this tab, the main pane displays the test sets that contain the current test case. Each test set is listed together with its name, release, the date of last execution, the owner, the status, the execution status, and a link to the actual test set details (see section 5.8). In addition, you can choose to display any of the custom properties associated with the test run.

Name	Execution Status	Release	Last Executed	Owner	Status	ID	Edit
Testing Cycle for Release 10 7	In Progress	1.0.0.0	1-Dec-2003	Joe P Smith	In Progress	TX:1	Edit
Testing Cycle for Release 11 9	Not Started	1.1.0.0	1-Dec-2003	Joe P Smith	Not Started	TX:2	Edit

The “show/hide columns” drop-down list allows you to change the fields that are displayed in the test run list as columns. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. The displayed columns can be any standard field or custom property.

You can also filter the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “Filter” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.

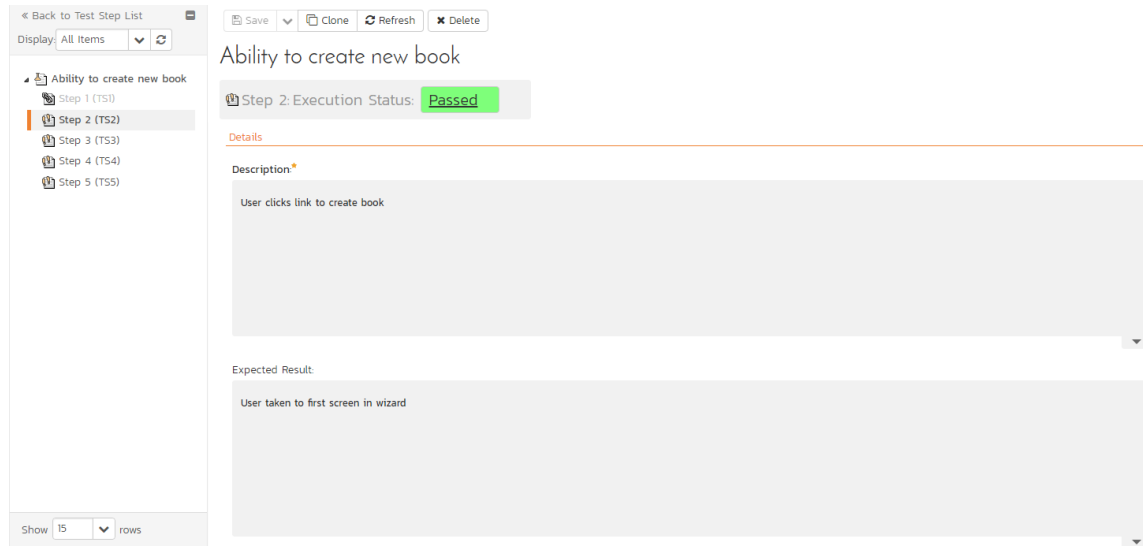
### 5.2.12. Tasks

This tab is only available to SpiraTeam users. It displays a table view of any tasks that have been associated to the test case. The only way to link a task to a test case is via test execution of a test case with a type set to “Exploratory”.

Type	Artifact Type	Name	Status	Creation Date	Creator	Comment	Project Name	ID	Edit
------	---------------	------	--------	---------------	---------	---------	--------------	----	------

### 5.3. Test Step Details

When you click on one of the hyperlinks next to a test step in the test step list (see above), you will be taken to the test step details screen illustrated below:



This page is made up of three areas; the left pane is the navigation window, the upper part of the right pane contains the test step detailed information itself, and the bottom part of the right pane contains related information about the test step.

The navigation pane consists of a link that will take you back to the test step list, as well as a list of the peer test steps to the one selected. This latter list is useful as a navigation shortcut; you can quickly view the detailed information of all the peer test steps by clicking on the navigation links without having to first return to the test step list page. You can also switch between seeing the list of test steps with the current filter applied or simply unfiltered.

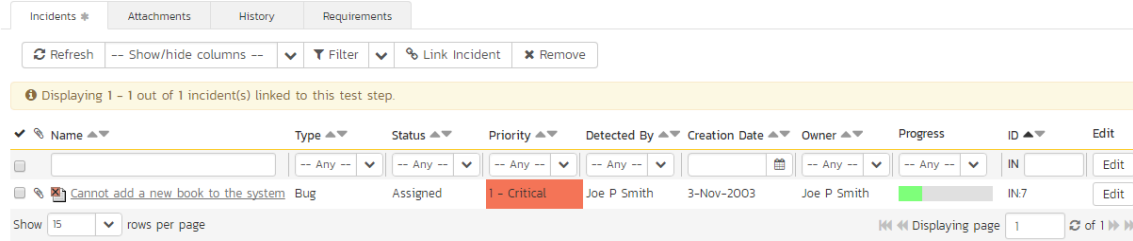
The top part of the right pane allows you to view and/or edit the details of the particular test step. You can edit the various fields (description, expected result and sample data) and custom properties. Once you are satisfied with them, click any **“Save”** button on the page to commit the changes. If you want to add a new test step to the test case, you should click **“Save and New”** from the dropdown menu of the **“Save”** button at the top of the page instead.

The lower part of the right pane can be switched between four different views by clicking the appropriate tab. Initially the pane will be on **“Incidents”** tab, but it can be switched to **“Attachments”**, **“History”** or **“Requirements”** tabs if so desired. Each of the views is described separately below.



### 5.3.1. Incidents

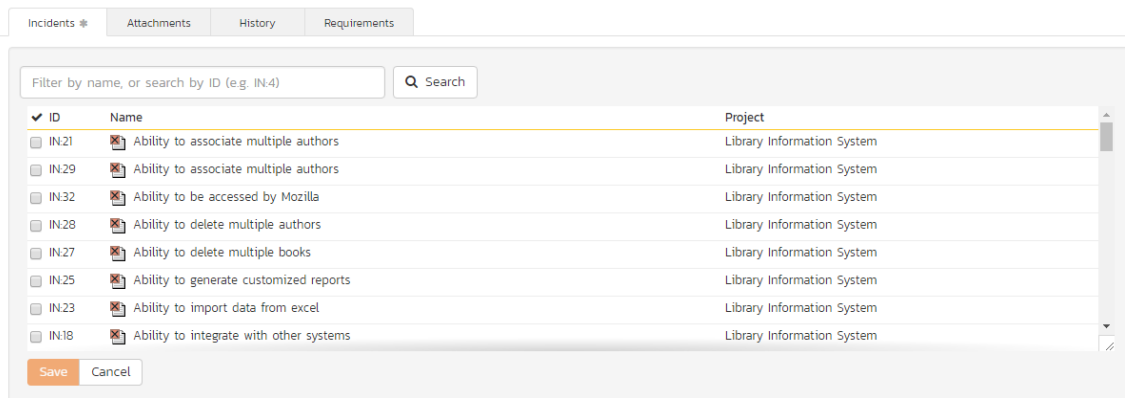
In this mode, the main pane displays a list of any incidents that are associated with this test step. They can either be linked indirectly due to being logged during a test run, or directly linked after the fact:



Each incident is listed together with the type, status, priority, name, owner, detector, detection date and a link to the actual incident details. You can customize the fields that are displayed using the “Show/Hide Columns” option. In addition, you can perform the following operations:

- **Refresh** – updates the list of incidents from the server, useful if other people are adding incidents to this release at the same time.
- You can also **filter** the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.
- **Edit** – Clicking the “**Edit**” button to the right of the incident allows you to edit the incident inline directly on this screen.

To create a new association between this test step and an existing incident, click the “**Link Incident**” button which will display the following panel:



You need to choose the specific incident(s) you want to link to, either by choosing the item from the scrolling selection box, or searching for them by name or ID. Before adding the chosen incidents you can add a comment that explains the rationale for the association.

### 5.3.2. Attachments

This tab displays the list of documents that have been “attached” to the test step. The documents can be in any format, though SpiraTeam® will only display an icon for certain known types.

Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
Expected_Result_Screenshot.png	Screen Shot	314 KB	Fred Bloggs	30-Apr-2006	Fred Bloggs	DC14	Edit

To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To delete an existing attachment from a test case, simply click the “**Delete**” button and the attachment will be removed from the list.

To attach a new document to the test step, you need to first click the “**Add New**” link to display the new attachment dialog box:

//

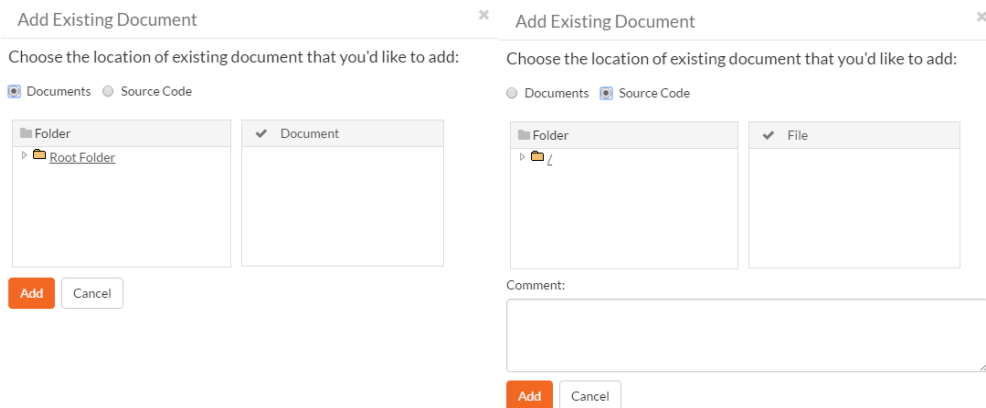
There are three different types of item that can be attached to a requirement:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the “**Upload**” button. The document will be copied from your computer and attached to the artifact.

- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the “**Upload**” button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “**Upload**” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the requirement. To do that, click on the “**Add Existing**” button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

### 5.3.3. History

This tab displays the list of changes that have been performed on the test step artifact since its creation. An example test step change history is depicted below:

Change ID	Change Date	Field Name	Old Value	New Value	Changed By	Change Type
11	2-May-2006	Expected Result	User taken to first screen	User taken to next screen in wizard	Fred Bloggs	Modified
3	4-Mar-2005	Expected Result	User taken to first screen		Joe P Smith	Modified

### 5.3.4. Requirements

Normally within SpiraTest, you will link the test cases in a project with your requirements to describe which requirements are covered by each of the test cases. When all of the tests for a requirement pass, the requirement is considered fully tested.

However, in some industries (for example when developing Defense systems) there is an additional requirement to report on the traceability between the individual **test steps** and the requirements. For customers that have such a requirement, this tab lets you associate the current test step with specific requirements.

Type	Name	Status	Importance	Project Name	ID
<input type="checkbox"/>					RQ

The tab displays a grid containing the requirements already mapped to this test step. You can filter that list by the requirement type, name, status, importance, project name and ID. You can remove an existing requirement by selecting its check box and clicking the 'Delete' button. This doesn't delete the requirement, just removes it from the test step.

Hovering the mouse over the names of the requirements will display a "tooltip" consisting of the requirement name, place in the hierarchy and a detailed description.

To add a new test case to the requirement, simply click on the 'Add' button:

All Packages ▾ Filter by name, or search by ID (e.g. RQ4)

ID	Name	Project
<input type="checkbox"/> RQ:1	Functional System Requirements	Library Information System
<input type="checkbox"/> RQ:2	Online Library Management System	Library Information System
<input type="checkbox"/> RQ:3	Book Management	Library Information System
<input type="checkbox"/> RQ:4	Ability to add new books to the system	Library Information System
<input type="checkbox"/> RQ:5	Ability to edit existing books in the system	Library Information System
<input type="checkbox"/> RQ:6	Ability to delete existing books in the system	Library Information System
<input type="checkbox"/> RQ:7	Ability to associate books with different subjects	Library Information System
<input type="checkbox"/> RQ:8	Ability to associate books with different authors	Library Information System
<input type="checkbox"/> RQ:9	Ability to associate books with different editions	Library Information System

You can search for a requirement by its ID if you know it (make sure to include the “RQ” prefix):

All Packages ▾ RQ6

ID	Name	Project
<input type="checkbox"/> RQ:6	Ability to delete existing books in the system	Library Information System

Otherwise, you can search for the requirements by choosing a parent package from the dropdown and/or entering a partial name match:

All Packages ▾ associate books

ID	Name	Project
<input type="checkbox"/> RQ:1	Functional System Requirements	Library Information System
<input type="checkbox"/> RQ:2	Online Library Management System	Library Information System
<input type="checkbox"/> RQ:3	Book Management	Library Information System
<input type="checkbox"/> RQ:7	Ability to associate books with different subjects	Library Information System
<input type="checkbox"/> RQ:8	Ability to associate books with different authors	Library Information System
<input type="checkbox"/> RQ:9	Ability to associate books with different editions	Library Information System

Once you have found the desired requirement(s), simply select their check boxes and click the ‘Save’ button to add them to the current test step:

Incidents ✱ Attachments History **Requirements ✱**

▾

Displaying 1 - 4 out of 4 association(s).

Type	Artifact Name	Status	Importance	Project Name	ID
<input type="checkbox"/> Feature	Ability to associate books with different editions	Developed	1 - Critical	Library Information System	RQ9
<input type="checkbox"/> Feature	Ability to associate books with different authors	Developed	1 - Critical	Library Information System	RQ8
<input type="checkbox"/> Feature	Ability to edit existing books in the system	Developed	1 - Critical	Library Information System	RQ5
<input type="checkbox"/> Feature	Ability to add new books to the system	Developed	1 - Critical	Library Information System	RQ4

Show 15 rows per page Displaying page 1 of 1

## 5.4. Execute Test Case(s)

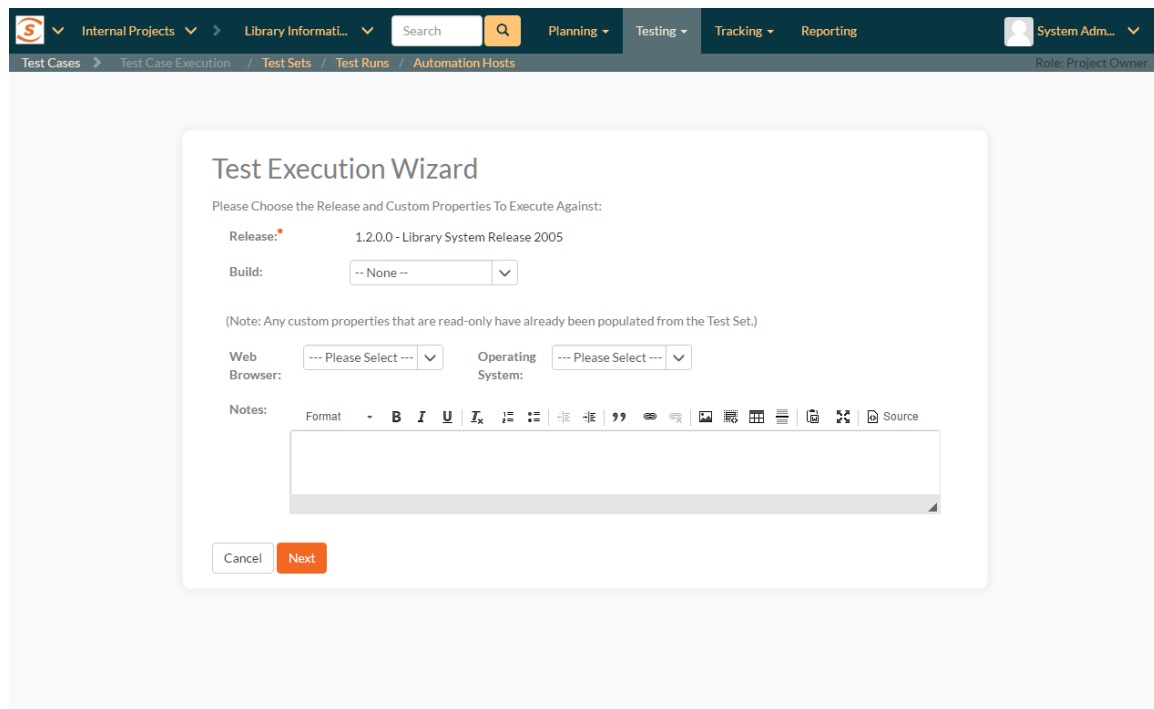
This section describes how a tester can follow the steps defined for a series of test cases and record what actually happened in the process. In addition, recorded failures of test cases can be used to automatically generate new incidents that will be added to the incident tracking module (see section 6).

You start test case execution in SpiraTeam by either:

1. selecting test cases or test sets on their respective page(s) and clicking the “**Execute**” button;
2. clicking the “**Execute**” button on the test cases / test sets listed on your personalized home page under “My Test Cases” or “My Test Sets”.

If you execute a test set then the values of the selected release and custom list properties for the test run are automatically populated from the test set, whereas if you directly execute a test case itself, those values can be chosen by the tester.

Regardless of the route taken to launch the test execution module, the first screen that will be displayed will look like the following:



The screenshot shows the 'Test Execution Wizard' interface. At the top, there is a navigation bar with a search box and several menu items: Internal Projects, Library Informati..., Planning, Testing, Tracking, and Reporting. The user's role is identified as 'System Admin...'. The breadcrumb trail indicates the current location: Test Cases > Test Case Execution / Test Sets / Test Runs / Automation Hosts. The main content area is titled 'Test Execution Wizard' and contains the following elements:

- A prompt: 'Please Choose the Release and Custom Properties To Execute Against:'
- 'Release:' dropdown menu with the value '1.2.0.0 - Library System Release 2005'.
- 'Build:' dropdown menu with the value '-- None --'.
- A note: '(Note: Any custom properties that are read-only have already been populated from the Test Set.)'
- 'Web Browser:' dropdown menu with the value '-- Please Select --'.
- 'Operating System:' dropdown menu with the value '-- Please Select --'.
- 'Notes:' section with a rich text editor toolbar (Format, Bold, Italic, Underline, Link, etc.) and a text input area.
- 'Cancel' and 'Next' buttons at the bottom.

Before actually executing the test scripts, you need to select the release (if not already set) and optionally the specific build of the system that you will be testing against. You can also specify any test run custom properties that have been defined by the project owner. This ensures that the resulting test runs and incidents are associated with the correct release of the system, and that the test runs are mapped to the appropriate custom properties (e.g. operating system, platform, browser, etc.).

If you have not configured any releases for the project, then the release drop-down list will be disabled and the test runs/incidents will not be associated with any particular release. If the test run was launched from a test set, the release and any list custom properties will be pre-populated from the test set itself and will not be changeable on this screen (unless they weren't set by the test set).

Once you have chosen the appropriate release name and/or custom properties, click the “**Next**” button to begin executing test steps. By default you will see the default test execution module, shown below.

There is a second test execution view: the exploratory test execution module. This has much in common with standard test execution but differs in a number of important ways. It is discussed in more detail at section 5.4.7. You will automatically see this module if the following three conditions are met;

1. you are executing a single test case (not a test set or a test case as part of a test set);
2. that test case is of type “exploratory”; and
3. you have the necessary permissions (you can create test cases)

The screenshot displays the Inflectra test execution interface. At the top, there is a navigation bar with tabs for 'Test Cases', 'Test Case Execution', 'Test Sets', 'Test Runs', and 'Automation Hosts'. The current view is 'Testing New Functionality' for Release 1.2.0.0. A progress bar indicates 'Progress (0 / 11 complete)'. The main content area is divided into two columns. The left column shows a list of test steps, with the first step selected: 'Ability to create new author'. The right column shows the detailed view of the selected step, including its title, description, and a list of steps. The first step is 'Step 1 User opens up Chrome and enters application URL: http://www.libraryinformationsystem.org'. The expected result is 'The browser loads the login web page' and the sample data is 'http://www.libraryinformationsystem.org'. Below the detailed view is a rich text editor for the actual result.

The screen is divided up into three main areas (each is explained in more detail in the sections below):

- **The header area** at the top of the page, which displays the name (if any) of the test run, along with the selected release. This section also contains buttons to control how the “test execution area” looks and functions for the tester.
- **The Progress Bar**, which shows a summary graphical view of the whole test run. The progress bar also has a number of navigation buttons to help you move around the test run, or to leave the

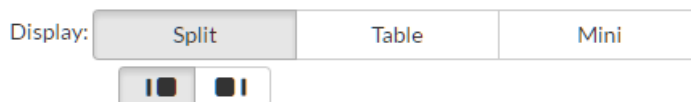
test execution page. Between the buttons are indicator blocks. For test runs with relatively few test steps, each indicator block represents a single test step. A tall dotted line is used to indicate the end of one test case and the start of another. When there are many test steps to a test run, each indicator block represents a test case. Hovering over an indicator block will display a tooltip with information about the test step or case represented. The color of the indicator block matches the color of any assigned execution status for the test step or test case (see below).

- The rest of the page contains the “**test execution area**”. This has details about all of the steps in the test run. It can be used to both navigate between test cases and test steps, as well as to actions on any test case or test step (for instance assigning an execution status or logging an incident). This area can look markedly different depending on which display mode a user has selected. However, in every mode, a tester will be able to readily view the name and description of the test step (and at times the parent test case), along with the description of the test step, instructions for carrying out it, and any expected results. The test can then compare the results with those listed as expected. As described below, depending on how the actual system responds, you will use the buttons and fields on the page to record what actually happened.

Note: on first accessing this screen, the user will be given a guided tour of many of the features of this page. This can be accessed at any time via the options menu (discussed below)

#### 5.4.1. Display Modes

The display mode toolbar is at the top right of the test execution screen. There are three different display modes. Each display mode has two sub-modes, using simple graphical images to indicate what they do (each pair of buttons to change sub-mode becomes visible on activating a particular display mode).



All of these modes affect how the test cases and test steps are displayed in the “test execution area”. The different views have been designed to suit different ways of testing, depending on how your organization works; or the needs of a tester for a particular test.

There are three parts in the “test execution area”, which are visible or hidden depending on the view.

- **Table:** this shows a list of every test case and step in the test run. The level of information it displays depends on the display mode.



- **Inspector:** this is a detailed form containing full information about a single test step (and its associated test case as needed). It also always shows the full set of actions that can be taken on that step
- **Iframe:** if you are testing an internal website (or external site that allows access via iframes) you can access it directly from this iframe browser. This allows you to have the test execution page and what you are testing open in the same web browser tab.

There are three main display modes:

- **Split mode:** shows a simplified list of test steps on the left (in the table) and full details about the currently selected test step on the right (in the inspector). The sub modes in the split view either show a narrow table and wide inspector, or a wide table and narrow inspector.

The screenshot shows a test management application interface. At the top, there is a navigation bar with tabs for 'Test Cases', 'Test Case Execution', 'Test Sets', 'Test Runs', and 'Automation Hosts'. The main content area is titled 'Testing New Functionality Release 1.2.0.0'. Below the title, there is a progress bar showing 'Progress (0 / 11 complete)'. On the left side, there is a table of test steps. The first step is 'Ability to create new author' with six sub-steps. The second step is 'Person loses book and needs t' with five sub-steps. On the right side, the 'Inspector' view is open for the first step, showing its title, description, and a rich text editor for the 'Actual Result'. The interface also includes a status bar at the top with various icons and a search bar.

The screenshot shows a web application interface for test management. At the top, there is a navigation bar with tabs for 'Internal Projects', 'Library Informati...', 'Search', 'Planning', 'Testing', 'Tracking', and 'Reporting'. Below this is a breadcrumb trail: 'Test Cases > Test Case Execution / Test Sets / Test Runs / Automation Hosts'. The main header displays 'Testing New Functionality Release 1.2.0.0' and a 'Display:' menu with options for 'Split', 'Table', and 'Mini'. A progress bar indicates 'Progress (0 / 11 complete)'. The main content area lists two test cases:

- Ability to create new author (TC 4)**: Tests that the user can create a new author record in the system. It includes six steps:
  - Step 1: User opens up Chrome and enters application URL: <http://www.libraryinformationsystem.org>
  - Step 2: User logs in to application
  - Step 3: User clicks link to create author
  - Step 4: User enters authors name and age
  - Step 5: User associates books with author
  - Step 6: User clicks submit button
- Person loses book and needs to report loss (TC 12)**: Tests that the user can create a new author record in the system. It includes five steps:
  - Step 1: User opens up Chrome and enters application URL: <http://www.libraryinformationsystem.org>
  - Step 2: User logs in to application
  - Step 3: User clicks link to report lost book
  - Step 4: User chooses lost book from list of his loans
  - Step 5: User clicks submit button

On the right side, a detailed view of the 'Ability to create new author (TC 4)' test case is shown. It includes a status bar with icons for success, failure, warning, and error. The test description is: 'Tests that the user can create a new author record in the system'. The first step is expanded: 'Step 1: User opens up Chrome and enters application URL: <http://www.libraryinformationsystem.org>'. Below this, it shows 'Expected Result: The browser loads the login web page' and 'Sample Data: <http://www.libraryinformationsystem.org>'. There are also tabs for 'Actual Result' and 'Attachments', and a rich text editor with a 'Source' view option.

- **Table mode:** in this mode the table takes up the full width of the “test execution area”, with both the inspector and iframe completely hidden. The list of test cases and steps displays all the information about each—the same information as is shown in the inspector. This view makes it easy to quickly scan through a number of test steps and take quick actions on many steps in sequence. The sub-modes in this view either expand or collapse any fields with more than one line or text in them. This is helpful to give either a very detailed or summary view to the table. Note too that every field that takes up more than one line will have a little expand or collapse button to its left, allowing for control of individual fields as needed.

## Testing New Functionality Release 1.2.0.0

Display: Split Table Mini

Progress (0 / 11 complete)



Step	Description	Expected Result	Sample Data	Status
Step 1	User opens up Chrome and enters application URL: http://www.libraryinformationssystem.org	The browser loads the login web page	http://www.libraryinformationssystem.org	Pass
Step 2	User logs in to application	User taken to main menu screen	Login=librarian, Password=librarian	Pass
Step 3	User clicks link to create author	User taken to first screen in wizard		Pass
Step 4	User enters authors name and age	User taken to next screen in wizard	Martin Amis, 39	Pass
Step 5	User associates books with author	User sees screen displaying all entered information	London Fields, Money, Informational	Pass
Step 6	User clicks submit button			Pass

- **Mini mode:** this mode fills the entire “test execution area” with the inspector, or a combination of the inspector and iframe. The table is completely hidden in this mode. The mini mode is designed to help you maximize space for the inspector or to allow you to test a website in the embedded mini browser (in the iframe) right next to a narrow inspector.

## Testing New Functionality Release 1.2.0.0

Display: Split Table Mini

Progress (0 / 11 complete)



Pass Blocked Caution Fail N/A

**Ability to create new author (TC 4)**  
Tests that the user can create a new author record in the system

Step 1 User opens up Chrome and enters application URL: http://www.libraryinformationssystem.org

Expected Result: The browser loads the login web page  
Sample Data: http://www.libraryinformationssystem.org

Actual Result Attachments Incidents

Format B I X [Rich Text Editor]

The screenshot displays the Inflectra testing environment. At the top, a navigation bar includes 'Internal Projects', 'Library Informati...', a search bar, and tabs for 'Planning', 'Testing', 'Tracking', and 'Reporting'. The user is identified as 'Fred Bloggs' with the role of 'Manager'. The main header shows 'Testing New Functionality Release 1.2.0.0' with a 'Display' dropdown set to 'Split'. Below this is a progress bar for 'Progress (0 / 11 complete)' with navigation buttons for back, forward, and play/pause. A 'Test Execution Wizard' dialog is open, prompting the user to 'Please Choose the Release and Custom Properties To Execute Against:'. The wizard includes fields for 'Release' (1.2.0.0 - Library System Release 2005), 'Build' (None), 'Web Browser' (Please Select), and 'Operating System' (Please Select). A note states: '(Note: Any custom properties that are read-only have already been populated from the Test Set.)'. The footer of the wizard shows 'SpiraTeam v5.0.0.0 | en-US | Eastern Daylight Time (UTC-4)' and 'Copyright (C) 2006-2016. Inflectra Corporation'.

#### 5.4.2. Navigating Around a Test Run

There are several ways to move through the different cases and steps of a particular test run. In the default “split” mode you are guided through a test run in order, however at any time, in any display mode, you can easily and quickly move steps. Note that if you click on a test case, the first test step in that test case will be selected as well.

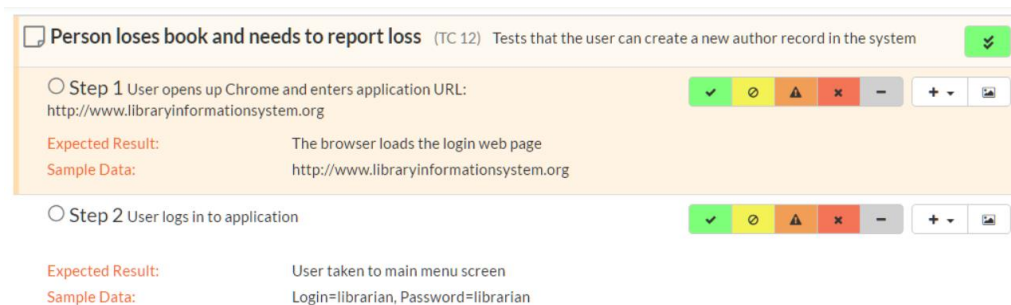
- **Using the progress bar buttons:** the left-hand side of the progress bar has three buttons: backward, forward, and play/pause (the last of these is discussed in more detail below). Clicking on the backward or forward buttons will move to the previous or next progress bar indicator block (and the associated test step or test case).



- **Using the progress bar indicator blocks:** clicking on any indicator block will immediately focus the test execution area on that test step or test case.

- **Using the table:** when the table view is visible (in either split mode or table mode) clicking on any item will immediately focus the test execution area on that test step or test case.
- **Progressing through steps using the inspector:** when the inspector is visible (in split or mini display mode), on properly setting a status for a test step (see 5.4.3 for further details), the next test step is automatically loaded into the inspector. If you were on step 3 of 5, you would be moved to step 4. If you were on the last step of a test case, you will be moved to the next test case, if one is available.
- **Pause/Play button:** the time spent on every test step is recorded, by default, during test execution. This allows an accurate assessment of exactly how long a test run took to complete and these timing details are saved with the test run and its results. If you wish to pause the behind-the-scenes timer (for instance if taking a break) click the pause/play button. To resume the time click it again.

The currently selected progress bar indicator block will be outlined with a peach border. The currently selected test case and test step on the table view will be indicated with a peach bar along their left edge, and will also be highlighted in a light peach.



### 5.4.3. Viewing and Recording Execution Details

There is a small icon to the left of each test step title and test case title. For test steps this is a circle, for test cases a square note. Once a status has been recorded for a test step (or once a test case has been assigned a status based on the statuses of its test steps) these icons will be filled with a visual indicator of its current status. The icons both become colored and are given a small symbol, based on the status. In the inspector view the associated button to that status has a gray bar beneath it.



## ✓ Step 2 User logs in to application

**Expected Result:** User taken to main menu screen

**Sample Data:** Login=librarian, Password=librarian

The same colors and symbols used to show a status are used on the buttons to record a status. The colors and symbols used are: green / tick = “Passed”; yellow / stop sign = “Blocked”; orange / warning triangle = “Caution”, red / cross = “Failed”, gray / dash = “Not Run”.

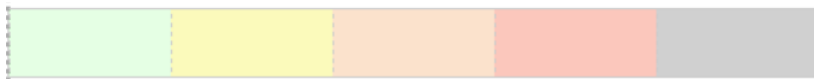
Depending on the display mode and device, the buttons may show the text name of the status along with the symbol (see examples below—the top button set is that on the inspector, the bottom from the table (when the display mode is set to table).



The various statuses when recorded against test steps will appear as below, respectively:



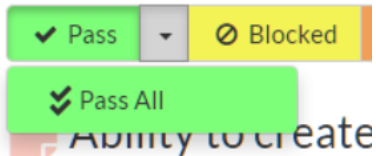
You will notice that softer shades are used above compared to the buttons. Similarly soft shades are also used on the progress bar indicator blocks, as shown below.



The status of a test case is determined by its test steps. If any of the steps are marked as “Caution”, “Blocked”, or “Fail” then the overall test case is marked with the most severe status of those statuses applied to any of the test steps from “Caution”, to “Blocked”, to “Fail” (e.g. if one is marked as “Caution”, the test case will be marked “Caution”; but if one is marked as “Caution”, and another “Blocked”, the case will be marked “Blocked”). If *all* the test steps passed, or if steps are marked either passed or “N/A”, then the overall test case is marked as “Passed”; any other case results in the test case being marked as “Not Run”.

If the expected results are indeed observed, then you simply need to click the “[Pass](#)” button to mark the test step as passed, and advance to the next test step, or if all the steps have passed, you can click “[Pass All](#)” to pass all the steps at once.

On the inspector, the “[Pass All](#)” button is visible via a dropdown to the right of the “[Pass](#)” button whenever the parent test case information is also displayed with the test step (typically only for the first step in a test case). This is illustrated in the screen shot below:



When in the table display mode, the “[Pass All](#)” button is shown on the right-hand side of the test case row, as illustrated below:

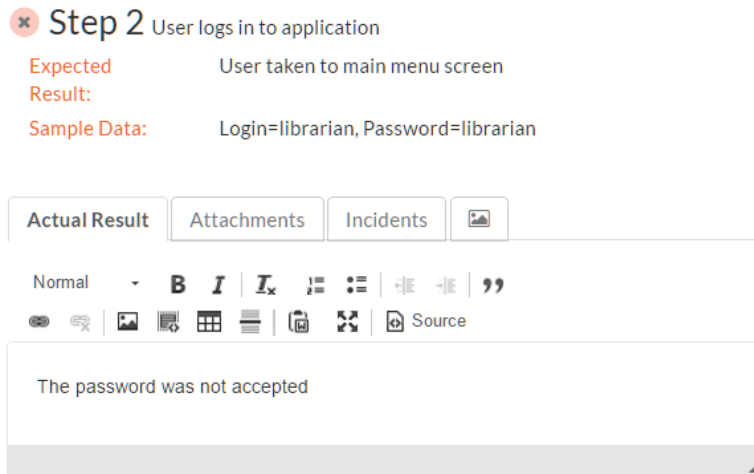


- Below the main pane there are two optional sections. The first one allows you to log an incident in the system associated with the test step. For failures this will typically be used to log a bug relating to the failure. However even if you pass a step you can still log an incident, which may be useful for logging non-critical cosmetic items that are not serious enough for a failure to be recorded. This tab also displays any pre-existing incidents that were associated with the test step being viewed.
- The second tab displays a list of attachments that are related to the current test case and/or test step. This list initially contains any documents that have been attached to either the test case in general or the test step in particular. However as you perform the testing, you can attach additional documents to this list that are relevant to the test results (e.g. screenshots of an error page); these attached documents will be associated with both the test run itself and any incidents that are created.

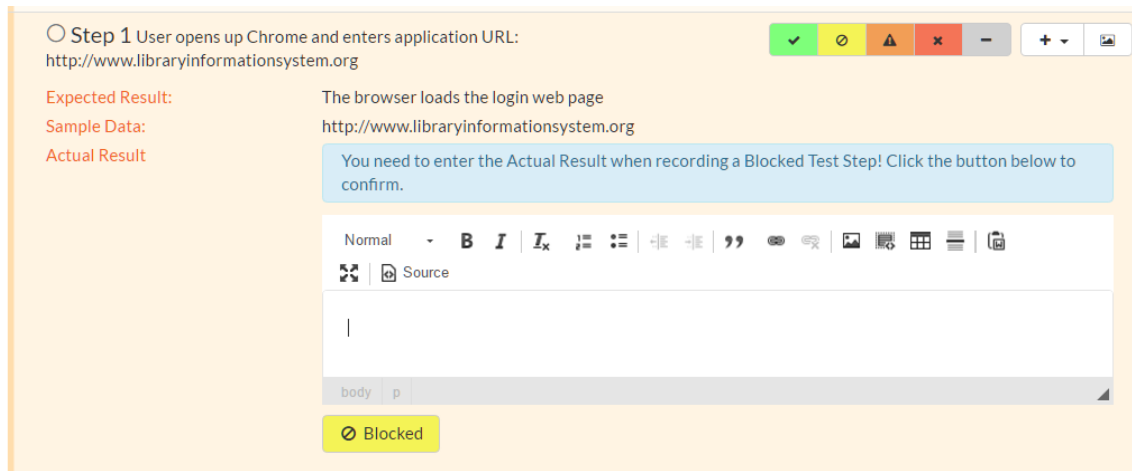
Once all the test steps have passed, you will be automatically be taken to the first step in the next test; if it is the last test case being executed, the <Finish> button will be displayed instead.

If the actual results differ from those expected, you need to enter a description of the actual result observed and click one of the “[Fail](#)”, “[Blocked](#)”, “[Caution](#)”, or “[N/A](#)” buttons. Unlike the “[Pass](#)” button, if you don’t enter a description for the actual result, the system will display an error message and re-prompt you again for input.

In the inspector, the actual results text box is shown in the first tab below the information provided to the tester for a test step, as illustrated below:

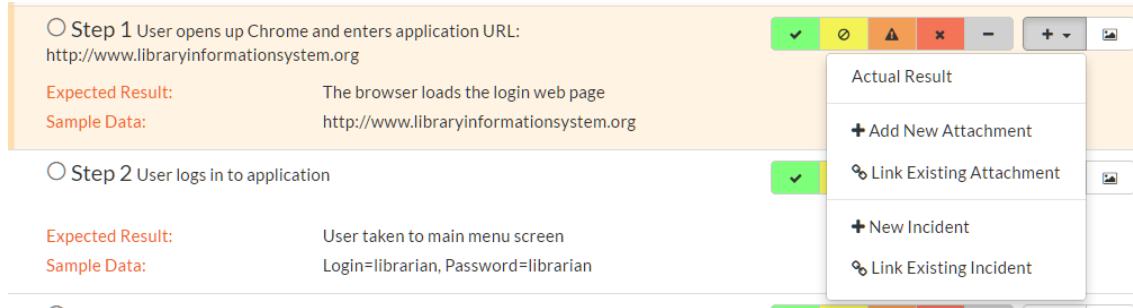


In the table display mode, previously entered actual results are always visible (below the information provided to the tester for a test step). On attempting to mark a step as anything other than "Pass" the actual results text box will automatically be displayed.



You can also choose to manually show the actual results text box by selecting "Actual Result" option from the "+" dropdown menu.





#### 5.4.4. Saving Screenshots to a Test Step

Often, testers will want to provide visual documentation of what they have found during the testing process. A screenshot of what they are testing is a great way to do this. To add a screenshot to the results of a test step, first copy your screenshot to the clipboard. Next, paste the screenshot into the actual results text box.

#### 5.4.5. Recording Extra Information

In addition to logging the result of a test step, you can optionally choose to generate a new incident at the point of logging the execution status of a test step. When the incident form is visible (see below) enter a name, type, priority, severity (and any custom properties) for the new incident *before* clicking an execution status button. The other information needed for the new incident is automatically populated from the test step details. The newly created incident will also be linked to the test step, allowing traceability from within the incidents module. The functionality for managing incidents is described in more detail in section 6.

If the inspector is visible, go to the “Incidents” tab. This will show any already linked incidents, show a detailed form for creating a new incident.

○ Step 1 User opens up Chrome and enters application URL: http://www.libraryinformationssystem.org

Expected Result: The browser loads the login web page  
 Sample Data: http://www.libraryinformationssystem.org

Actual Result Attachments Incidents

No incidents are currently linked to this test step [Link Existing Incident](#)

**New Incident**

Please enter the following information to log an incident with this test step:

Name:\*

Type:\*  Priority

Severity:

Component:

Notes: 

Format **B** **I** **U** **I**<sub>x</sub> Source

Operating System:\*  Web Browser:\*  Internal?:

Review Date:  Difficulty:\*

Reviewer:  Decimal:

You can instead link the test step to an existing incident (by clicking the “[Link Existing Incident](#)” button). The following popup will be displayed, where you can either enter an incident ID (if known), or choose one from the list.

**Add New Association** ✕

Please choose the artifact that you want to add an association to:

Enter Artifact ID:

Choose from list:

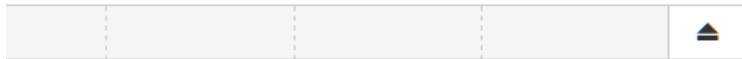
- Name
- Doesn't let me add a new category
- Quote handling issues throughout
- Cannot install system on Oracle 9i
- Validation on the edit book page
- Cannot add a new book to the system

When in the table display mode, open the “+” dropdown menu to show options to either add a new incident or link an existing incident. Click on the option required to display the appropriate popup. Note that on clicking “[Add](#)” the incident will be immediately linked to the selected test step.

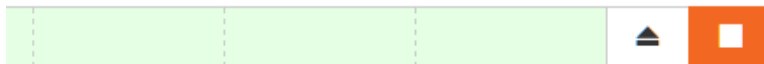
If you need to attach documents to the test run (in addition to any screenshots), you can either attach a new or link an existing document. From the inspector, go to the “Attachments” tab to see any documents already linked, or to add a document as needed. In the table display mode, select either “Add New Attachment” or “Link Existing Attachment” from the “+” dropdown menu. See section 5.2.9 for additional information about how to the different available options (e.g. either upload a document, url link, or screenshot, or to link a document or from source code).

#### 5.4.5. Leaving the Test Execution Page

If you are not able complete the whole test run in a single session, click the “Leave” button on the right of the progress bar—shown with an eject symbol (see below). This will return you to the page where you began the execution from. You can resume testing at a later date by locating the test run on your ‘My Page’ under ‘My Pending Test Runs’ and choosing to resume testing. Note that the system will remember every result you have logged, along with the last test step you were working so you can pick up right where you left off.

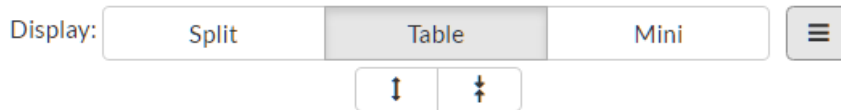


Once either all steps in a test have an execution status recorded, or at least one step in each test case has been recorded with any status other than “Pass” the test run can be finished. An orange button at the far right of the progress bar with a stop symbol will appear (see below). Clicking this button will save and archive the entire test run (so it can no longer be amended) and the page will automatically exit the test execution page.



#### 5.4.6. Extra Test Execution Options

There are a number of ways that some users may wish to alter the test execution page, depending on how they work. Options to change this are available from the menu button to the right of the display buttons.



The following actions are available from this dropdown menu:

- **Refresh:** this simply reloads the test run data. This is useful if other people are working on different test cases within the same test run and you want to make sure that you have the most current information about the statuses they have recorded.
- **Always show test case:** by default, the inspector only shows the test case details when the first test step of a test case is displayed. Checking this item will mean that the test case details will be shown on every test step.
- **Show custom properties:** by default, only a handful of system fields are shown for the test case and test step. If your organization places important and relevant information into custom fields as well, you can check this item to make them visible in the inspector for every case and step. Note that these fields will not be visible in the table display mode.
- **Show guided tour:** if you missed or want to revisit the visual guided tour of the test execution page, click this button to run the tour again.

#### 5.4.7. Exploratory Test Execution

As mentioned above, there are a number of conditions that must be satisfied for a test to run in exploratory mode. Exploratory testing is designed for relatively experienced testers and rather than to record the results of a pre-determined set of steps, to instead adjust and create the testing sequence during the act of testing itself. During exploratory testing test steps can be added, removed, edited, moved freely, at any time.

Care must therefore be taken that this form of testing and of recording the results of a test are used appropriately. The conditions set by the system are one means of limiting its use.

When starting exploratory testing the main screen will resemble the one below. Note that it looks broadly similar to that for standard test execution and is made up of three different areas:

1. a list of test steps on the left;
2. details about the currently selected step on the right; and
3. information at the top of the page about the test run itself (it's name and description, release, and how many steps it contains), along with a mini toolbar. In exploratory testing there is no progress bar, or options to layout the page in different views.

## Exploring testing



Release 10.0.0 TC29 ( 0 / 1 Steps )

○ Step 1: New Test Case

Pass Blocked Caution Fail N/A

○ Step 1

New Test Case

Actual Result

Tasks Incidents Attachments

Please enter a name to log the task

Description

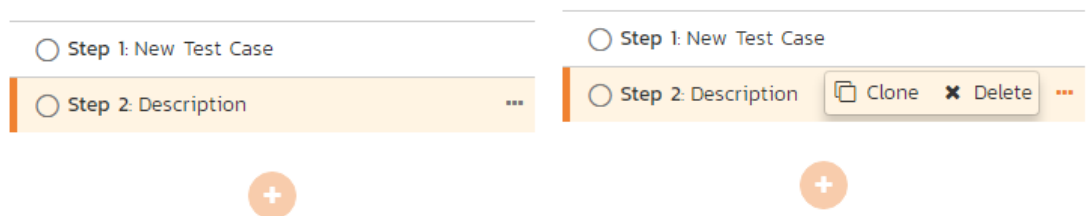
Owner: ○ -- None --

Add

All fields in the right hand details area, or the top part of the page can often be edited. Their contents and associated label will be grayed out if they are read only fields (for instance if they are information from a custom property). To edit a field, click on it, change the text as required, then click out of the field. The information will be automatically saved. Note that any test steps that come from a link test case will be read only and as such their contents cannot be edited, nor can they be deleted.

Just like with normal test execution, you can navigate between steps using the list of steps on the left; and steps can be passed, or failed using the execution status toolbar on the right hand section of the page. The unique actions you can take on test steps (besides editing their fields) are below:

1. **add a step:** click on the plus button beneath the list of test steps on the left
2. **clone an existing step:** when you hover a test step in the list, you will see a button appear on its right. Click on this to show a mini menu with an option to clone the step. This will create a clone, at the bottom of the list of test steps, with a blank actual result

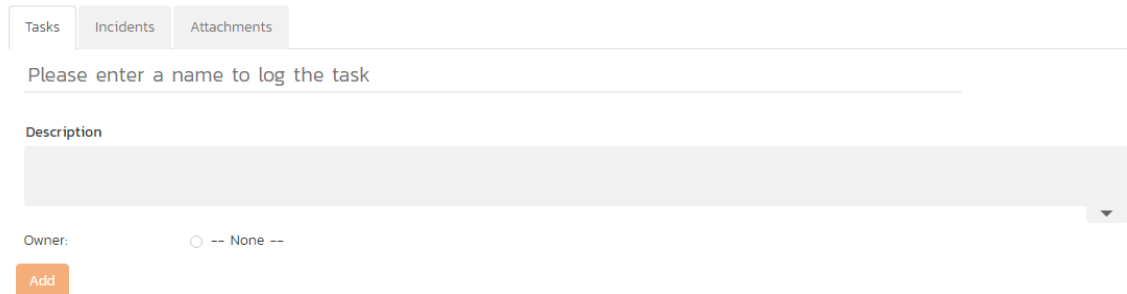


3. **delete an existing step:** if you have more than one test step, any editable test step can be deleted. Click on the button for that step (as explained above) and click delete from the mini menu.

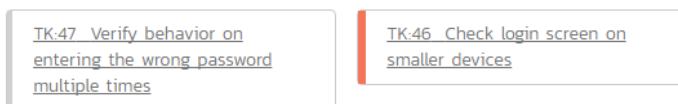
4. **move an existing step:** to move an editable step click and drag it to the desired location in the test step list.

Below the main detailed section there are two or three tabs. SpiraTest users will only see two tabs – incidents and attachments. SpiraTeam users will additionally see a tasks tab. The incident and attachment tabs function identically to normal test execution.

The task tab allows the tester to quickly create tasks based on their exploratory testing, and optionally assign them to a user involved in the project. These tasks are attached to the test run as a whole, so any previously entered tasks will be visible even when changing steps. Creating a task is a light touch way of communicating with others about your findings and alerting them that some work is likely required to fix or clarify a feature. It is quicker to enter and manage than an incident.



Tasks are shown as a list of cards with their left edge showing their priority by color. On creation a task's status will be gray – showing that no priority has yet been set. The title of the task can be clicked to open the details page for that task.

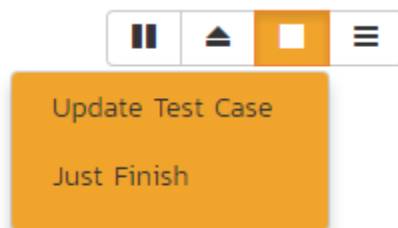


The toolbar at the top right of the page has a number of buttons:

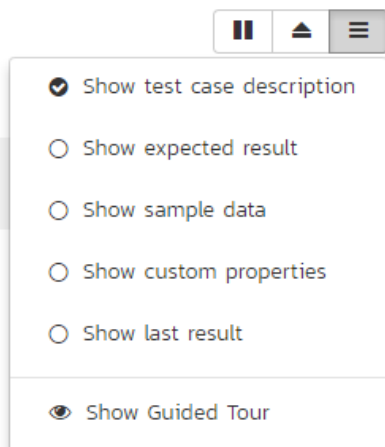


1. **Pause/Play button:** the time spent on every test step is recorded, by default, during test execution. This allows an accurate assessment of exactly how long a test run took to complete and these timing details are saved with the test run and its results. If you wish to pause the behind-the-scenes timer (for instance if taking a break) click the pause/play button. To resume the time click it again.

2. **Leave button:** as with normal test execution, if you are not able complete the exploratory test in a single session, click the “Leave” button—shown with an eject symbol. You can resume testing at a later date by locating the test run on your ‘My Page’ under ‘My Pending Test Runs’ and choosing to resume testing. Note that the system will remember every result you have logged, along with the last test step you were working so you can pick up right where you left off.
3. **Finish button:** once either all steps in a test have an execution status recorded, or at least one step has been recorded with any status other than “Pass” the test run can be finished. An orange button with a stop symbol will appear (see below). Clicking this button will give you two options. “Update Test Case” will update the test case execution status, and also change its name, description, and test steps to reflect those on this page (adding, deleting, moving, editing as necessary). “Just Finish” will only change the execution status of the test case only—leaving all details of the test case unchanged. Either option will archive the entire test run (so it can no longer be amended) and the page will automatically exit the test execution page.



4. **Options:** the right most button on the toolbar gives additional options for customizing the page. Specifically a user can decide what fields they wish to show or hide based on how they prefer to work in exploratory testing mode. Additionally this menu let's you revisit the introductory tour shown the first time the page is visited.



## 5.5. Test Run List

When you click on the Testing > Test Runs global navigation link, you will be taken to the test run list screen illustrated below:

Name	End Date	Test Set	Type	Tester	Release	Execution Status	Est. Dur.	Act. Dur.	ID
Ability to create new book	4-Dec-2003	Any	Automated	Fred Bloggs	110.0.0003	Failed	0.0h	1.2h	TR18
Ability to edit existing book	4-Dec-2003	Any	Automated	Fred Bloggs	110.0.0003	Failed	0.1h	1.2h	TR19
Ability to create new author	4-Dec-2003	Any	Automated	Fred Bloggs	110.0.0003	Caution	0.2h	1.2h	TR20
Ability to create new book	3-Dec-2003	Any	Automated	Joe P Smith	110.0.0002	Passed	0.0h	1.2h	TR15
Ability to edit existing book	3-Dec-2003	Any	Automated	Joe P Smith	110.0.0002	Blocked	0.1h	1.2h	TR16
Ability to create new author	3-Dec-2003	Any	Automated	Joe P Smith	110.0.0002	Caution	0.2h	1.2h	TR17
Ability to create new book	2-Dec-2003	Any	Automated	Fred Bloggs	110.0.0001	Passed	0.0h	1.2h	TR13
Ability to edit existing book	2-Dec-2003	Any	Automated	Fred Bloggs	110.0.0001	Passed	0.1h	1.2h	TR14
Ability to edit existing author	1-Dec-2003	Any	Manual	Fred Bloggs	10.1.0	Blocked	0.1h	1.6h	TR11
Ability to edit existing book	1-Dec-2003	Any	Manual	Fred Bloggs	10.0.0	Caution	0.1h	0.8h	TR10
Ability to create new book	1-Dec-2003	Testing Cycle for Release 11	Manual	Fred Bloggs	10.1.0	Passed	0.2h	1.5h	TR2

The test run list screen displays all the individual test executions performed in the current project, in a filterable, sortable grid. The grid displays the test run number together with fields such as execution status, name, assigned tester, execution date, test set, specified release, etc. The choice of columns displayed is configurable per-user, per-project, giving extensive flexibility when it comes to viewing and searching test runs.

In addition, you can view a more detailed description of the test run by hovering over the test run name hyperlink to display a “tooltip”. If you click on this test run hyperlink, you will be taken to the test run details page described in the next section. Clicking on any of the pagination links at the bottom of the page will advance you to the next set of test runs in the list according to the applied filter and sort-order. There is also a drop-down-list at the bottom of the page which allows you to specify how many rows should be displayed in each page, helping accommodate different user preferences.

### 5.5.1. Refresh

Clicking on the “**Refresh**” button simply reloads the test run list. This is useful as other people may be completing test runs, and after stepping away from the computer for a short-time, you can click this button to make sure you are viewing the most current test run list for the project.

### 5.5.2. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the test run list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings



for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

### 5.5.3. Sorting and Filtering

You can easily filter and sort the list of test runs. To filter the list by any of the visible fields, you simply choose an item from the appropriate drop-down list, and for the other fields, you enter a free-text phrase then click <Filter> or press the <ENTER> key to apply the different filters. Note that the name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name.

To change the column that is sorted, or to change the direction of the current sort, simply click on the up/down arrow icon in the appropriate column. The currently sorted column is indicated by the darker arrow. In the screen-shot above, we have filtered on test runs that have failed, sorted in order of increasing release version number.

Clicking on Filter > Clear Filter removes any set filters and expands the test run list to display all test runs for the current project, and clicking on Filter > Save Filter allows you to save the filter to your ‘My Page’ for use in the future. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter.

As a shortcut, the left hand panel includes a set of **Quick Filters** that can be applied in a single-click:

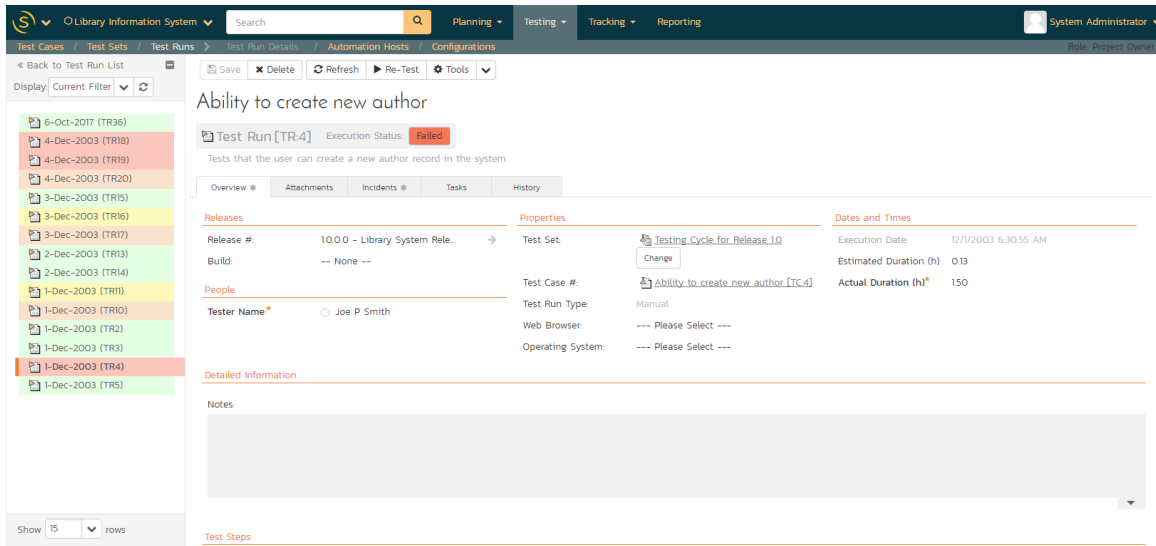
- **The topmost section** – This displays any saved requirement filters created by the current user alongside any ‘shared’ filters. The latter are marked with an icon showing a group of people.
- **Releases** – This section lists the releases and iterations defined for the current project. Clicking on any of the releases or iterations in the list will filter the requirements by that release/iteration.

### 5.5.4. Printing Items

To quickly print a single test run or list of test runs you can select the items’ checkboxes and then click the Print icon. This will display a popup window containing a printable version of the selected items.

## 5.6. Test Run Details

When you click on any of the individual test runs in the test run list, you are taken to the Test Run details page (not to be confused with the Test Case details page) shown below:



This page consists of three panes:

1. The left hand navigation pane displays a list of related test runs with a color indicator for their current execution status. The display dropdown will let you choose whether the list contains test runs that are for the same release, test case or test set, or are just a filtered/unfiltered list based on your last search in the main test run list page.
2. The top right area shows headline information about the test run details of the test run itself
3. The main pane on the right displays tabs for detailed information about the test run, and its associations. The overview tab is initially loaded and shows the name, description, release, test set, estimated and actual duration, tester name, test run type, automation host fields, along with others, including custom fields. Underneath this is shown the list of test run steps, and any console output from a test automation engine such as Rapise, NUnit, JUnit, QTP, or Selenium.

### 5.6.1. Re-running a Test

There is a button on the main test run toolbar called '**Re-Test**'. If you click this button, SpiraTeam will launch the test execution wizard for this specific test case, with current release and/or test set already selected for you. This is a handy way of quickly re-running a failed test that has been addressed by the developers.

### 5.6.2. Editing a Test Run

When reviewing the test run, you may find that you need to change the results of the test run (e.g. the user selected the wrong release or custom property value). Many of the fields are editable at a later date, and to make changes, just modify the appropriate fields and click any "**Save**" button.

### 5.6.3. Deleting the Test Run

If you need to delete a test run that was erroneously captured, all you need to do is click on the link to access the invalid test run and then click the **“Delete”** button to remove it from the system. This will then force the system to update the status of the test case itself from the other logged test runs.

### 5.6.4. Test Run Steps

In the case of a manual test run, this section displays all the steps of the test case *as they appeared during the test run in question*. This means that if the test steps were changed after running the test, the list here will reflect the original information.

Step	Test Step Description	Expected Result	Sample Data	Test # / Step #	Actual Result	Execution Status
1	User logs in to application	User taken to main menu screen		TC17 / TS19		Passed
2	User clicks link to create author	User taken to first screen in wizard		TC4 / TS7		Passed
3	User enters authors name and age	User taken to next screen in wizard	Martin Amis, 39	TC4 / TS8		Passed
4	User associates books with author	User sees screen displaying all entered information	London Fields, Money, Informational	TC4 / TS9		Passed
5	User clicks submit button	Confirmation screen is displayed		TC4 / TS10	The confirmation screen doesn't appear, instead you see a blank screen <a href="#">View Incidents</a>	Failed

Each test run step is displayed along with the description, expected result, suggested sample data, a link back to the current version of the test step in question, the actual result and the execution status for this step *in this particular test run*. Where an actual result was recorded, an additional **“View Incidents”** button will be displayed. This allows you to view any incidents that are associated with this particular test run step:

ID	Incident Name	Type	Status	Priority	Severity	Owner	Creation Date	Detected By
IN2	<a href="#">Not able to add new author</a>	Incident	New	-	-	-	1-Nov-2003	Joe P Smith

Clicking on the link will open up a popup dialog box that displays a list of all the incidents associated with the selected test run step. Each of the incidents listed will reflect the most up-to-date information regarding that incident, including its type, status, priority, name, assigned owner, detection date and who

first detected it. Clicking on the incident name will take you to the details page for that incident, which is described in section 6.2.

### 5.6.5. Console Output

In the case of an automated test run, this tab will display the details of the test run as reported from the test runner application. These details will vary depending on the type of automated tool being used, but typically they include the name of the automated test runner, the number of assertions raised, the name of the corresponding test case in the tool, the status of the test run and a detailed error message, and the stack-trace in the case of a failure. An example test run as reported from the NUnit automated test runner is illustrated below:

Console Output

Runner Name:	JUnit	Assert Count:	0
Test Name:	_O2_TestEditBook	Automation Host:	-

Message: Expected 1 but 2 was found

Details:

Object variable or With block variable not set.

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

Exception Details: System.NullReferenceException: Object variable or With block variable not set.

Source Error:

Line 215: Response.Write("<option selected value="" & MonthCheck(MonthCount) & "">" & MonthCount & "</option>" & vbCrLf)

Line 216:Else

Line 217: Response.Write("<option value="" & MonthCheck(MonthCount) & "">" & MonthCount & "</option>" & vbCrLf)

Line 218:End If

Line 219:

Details on how to use SpiraTeam® in conjunction with an automated testing tool are provided in the *SpiraTeam® Automated Testing Integration Guide*, which can be downloaded from the Inflectra® website.


### 5.6.6. Attachments

This tab shows the list of documents that have been “attached” to the test run. The documents can be in any format, though SpiraTeam® will only display the icon for certain known types.

Overview \* Attachments \* Incidents \* Tasks History

+ Add New Add Existing Remove Refresh -- Show/Hide columns -- Filter

Displaying 1 - 1 out of 1 attachment(s).

Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
 Error Logging-in Screen-shot.gif	Screen Shot	48 KB	Fred Bloggs	23-Apr-2006	Fred Bloggs	DC:3	Edit

Show 15 rows per page

Displaying page 1 of 1

The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To view the document, click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To remove an existing attachment from a test run, check its checkbox then click the “[Remove](#)” button and the attachment will be removed from the list.

To attach a new document or web link to the test run, you need to click on the “Add New” hyperlink to open the “[Add Attachment](#)” dialog box. There are three different types of item that can be attached to a test run:

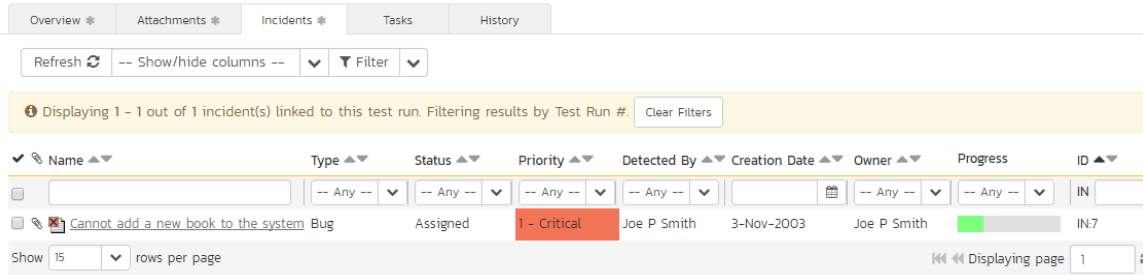
- To upload a file, choose “File” as the type and then click the “[Browse](#)” button and select the file from your local computer, optionally enter a detailed description then click the “[Upload](#)” button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the <Upload> button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “[Upload](#)” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the test run. To do that, click on the “[Add Existing](#)” button to bring up the add file association dialog box. You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

### 5.6.7. Incidents

This tab displays the list of incidents associated with the current test run. The incidents will have been logged during the creation of the test run and will be linked to one of the steps in the test run:

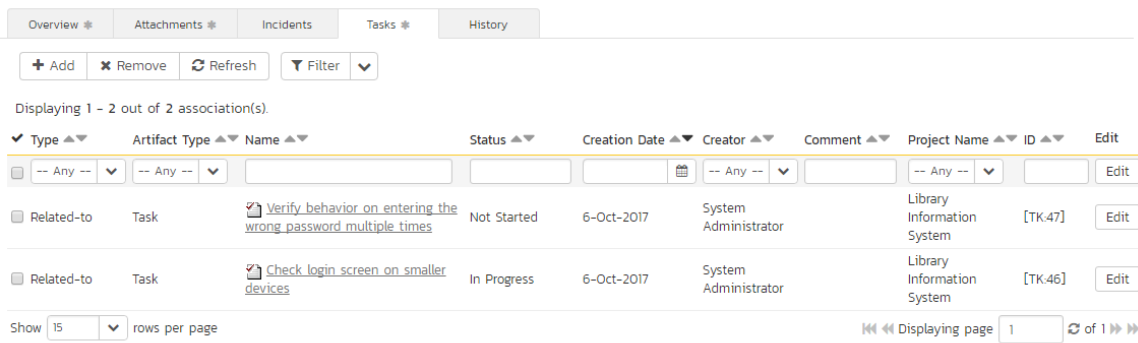


Each incident is listed together with the type, status, priority, name, owner, detector, detection date and a link to the actual incident details. You can customize the fields that are displayed using the “Show/Hide Columns” option. In addition, you can perform the following operations:

- **Refresh** – updates the list of incidents from the server, useful if other people are adding incidents to this release at the same time.
- You can also **filter** the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.
- **Edit** – Clicking the “**Edit**” button to the right of the incident allows you to edit the incident inline directly on this screen.

### 5.6.8. Tasks

This tab is only visible to users of SpiraTeam. It shows the list of tasks associated with the current test run. Tasks can only be added to a test run created from an exploratory test case. These tasks will have been logged during the execution of the test.



## 5.6.9. History

This tab displays the list of changes, if any, that have been performed on the requirement artifact since its creation. An example requirement change history is depicted below:

Overview \* Attachments \* Incidents \* Tasks History

Refresh Filter Admin View

Displaying 1 - 0 out of 0 change(s).

Change ID ▲▼	Change Date ▲▼	Field Name ▲▼	Old Value ▲▼	New Value ▲▼	Changed By ▲▼	Change Type ▲▼
--------------	----------------	---------------	--------------	--------------	---------------	----------------

Show 15 rows per page

Displaying page 1 of 1

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “[Admin View](#)” button to revert any unwanted changes.

## 5.7. Test Set List

As well as being able to organize test cases into folders, you can also create separate groupings of test cases called test sets which can then be assigned to testers as a package. To view the list of test sets for a project, click on Testing > Test Sets in the global navigation:

Library Information System Search Planning Testing Tracking Reporting System Adm

Test Cases / Test Sets / Test Runs / Automation Hosts / Configurations

+ New Test Set x Delete Refresh Focus On Filter Edit Tools -- Show/hide columns --

Displaying 1 - 6 out of 6 test set(s) for this project. Root Filtering results by Name. Clear Filters

Name ▲▼	Execution Status	Planned Date ▲▼	Release ▲▼	Last Executed ▲▼	Owner ▲▼	Status ▲▼	ID ▲▼
Functional Test Sets 20				1-Dec-2003			TX
Regression Test Sets 8							
Exploratory Testing 2					Fred Bloggs	Deferred	TX6
Regression Testing for Windows 8 4					Fred Bloggs	Completed	TX3
Regression Testing for Windows Vista 4						Completed	TX4
Testing Cycle for Release 10 7		4-Feb-2007	10.0.0	1-Dec-2003	Joe P Smith	In Progress	TX1
Testing Cycle for Release 11 9		6-Feb-2007	11.0.0	1-Dec-2003	Joe P Smith	Not Started	TX2
Testing New Functionality 4		9-Feb-2007	12.0.0		Fred Bloggs	In Progress	TX5

Show 15 rows per page

Displaying page 1 of 1

The test set list consists of hierarchical list of all the test sets in the current project organized into folders. The structure is very similar to the folder structure in Microsoft Windows® Explorer, and users will find this very familiar and intuitive to use. A folder tree is on the left hand side—with triangle icons to expand / collapse each folder. Contents of the selected folder (the one marked in bold on the folder tree) are shown on the right hand side.

When you create a new project, this list will initially be empty, and you will have to use the “[New Test Set](#)” button to start adding test sets to the system.

Each test set is listed along with the number of test cases contained (in parenthesis), the aggregate execution status of the contained test cases (using a graphical bar-chart), the date that the test set has been scheduled to be executed (planned date), the date that it was last executed, the person currently assigned to execute the test set, the status and the test set id. Clicking on a test set’s hyperlink will take you to the test set details page for the item in question.

Note: the test set status is separate from the execution status of the individual test cases and represents where the test set is in its lifecycle:

- **Not Started** – The test set has been assigned to a tester or automation host and no testing has been performed.
- **In Progress** – The test set has been assigned to a tester or automation host and the testing is in progress.
- **Completed** – The test set was previously assigned, but has now been completed, with all test cases having an execution status recorded and the tester having clicked the Finish button in the test execution wizard.
- **Blocked** – The tester or automation host was unable to execute the assigned test set because of a failure external to the actual test case.
- **Deferred** – The test set was previously assigned, but: execution had not been completed (at least one test case does not have a recorded execution status); and the Tester deleted the Pending Test Run entry from their My Page.

#### 5.7.1. Delete

Clicking on the “[Delete](#)” button deletes the currently selected test sets. It will delete the association between the test set and its contained test cases, but it will not delete the test cases themselves.

#### 5.7.2. Refresh

Clicking on the “[Refresh](#)” button simply reloads the list of test sets. This is useful if other people are making changes to the test set list and you want to make sure that you have the most current version.

#### 5.7.3. Focus On

The “[Focus On](#)” button is a useful when you have performed a filter on the list of test sets and then wish to quickly navigate to the folder of a particular test set shown in the list. After selecting a test set, clicking the button will move the left hand folder tree to the folder that contains the selected test set. It will also



change the list view on the right to show all of the test sets within that folder (i.e. the selected test set and its siblings).

#### 5.7.4. Edit

Each test set in the list has an “**Edit**” button in its right-most column. When you click this button, *double-click* on any of the cells in the row, or select a row and click the “**Edit**” button in the toolbar at the top of the page. This will change the item from “View” mode to “Edit” mode. The various columns are made editable, and “**Save**” and “**Cancel**” buttons are displayed in the last column:

Name	Execution Status	Release	Last Executed	Owner	Status	ID	Edit
Exploratory Testing 2				Fred Bloggs	Deferred	TX.6	Edit
Testing Cycle for Release 11 9	<div style="width: 100%; height: 10px; background-color: green;"></div>	11.0.0	1-Dec-2003	Joe P Smith	In Progress	TX.1	Save Cancel
Testing Cycle for Release 11 9	<div style="width: 100%; height: 10px; background-color: green;"></div>	11.0.0	1-Dec-2003	Joe P Smith	Not Started	TX.2	Edit
Testing New Functionality 4	<div style="width: 100%; height: 10px; background-color: green;"></div>	12.0.0		Fred Bloggs	In Progress	TX.5	Edit

If you click “**Edit**” on more than one row, the “**Save**” and “**Cancel**” buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one “**Save**” button. Also, if you want to make the same change to multiple rows (e.g. to change the owner of five test sets from “Fred Bloggs” to “Joe Smith”), you can click on the “**fill**” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the “**Edit**” button on the same row as the Filters and it will switch all the selected items into edit mode.

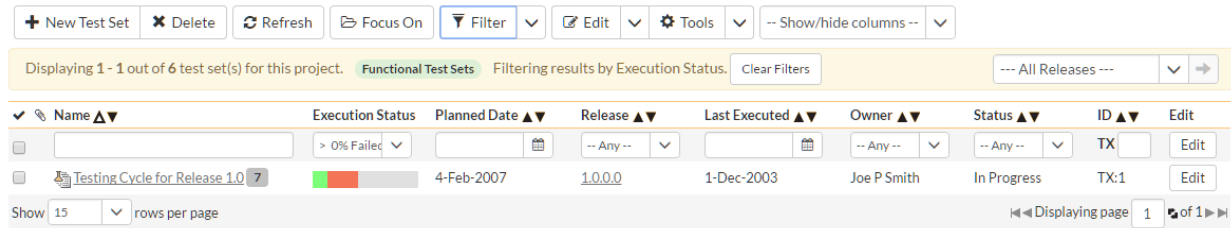
When you have made your updates, you can either click “**Save**” to commit the changes, or “**Cancel**” to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

#### 5.7.5. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the test set list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

### 5.7.6. Filtering

You can easily filter the list of test sets. To filter the list by any of the displayed columns, you either choose an item from the appropriate drop-down list or enter a free-text phrase (depending on the type of field) then click “**Filter**” or press the <ENTER> key to apply the different filters. Note that the Name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name. The other free-text fields need to be exact matches (e.g. dates, test set numbers). In the screen-shot below, we are filtering on test sets that contain at least one failed test case.



In addition, if you have a set of filters that you plan on using on a regular basis, you can choose the option Filter > Save Filter to add the current filter to the list of saved filters that appear on your ‘My Page’. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter.

Because the same test set can be run against more than one release, sometimes you want to see the execution information for the displayed test sets for different releases. If you select a release or iteration from the dropdown marked “All Releases” on the right above the table, then the execution information for that specific release will be displayed. If the dropdown is set to “all releases”, then it shows only the most recent execution information. In both cases, all test sets (as per any filter) are listed.

### 5.7.7. Copying Test Sets

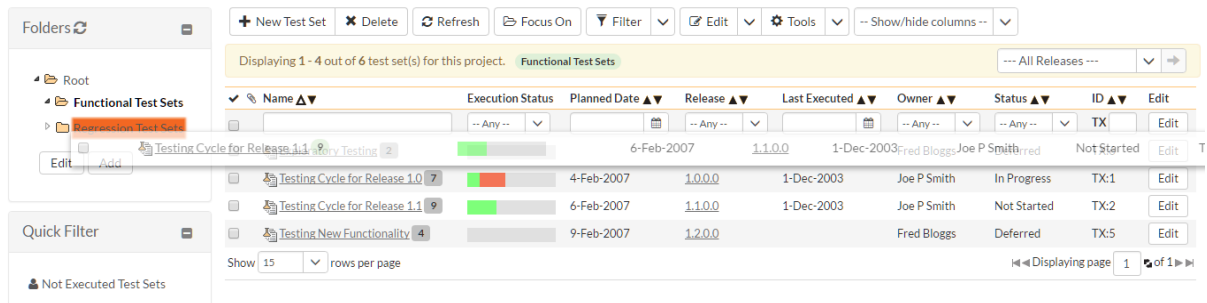
To copy one or more test sets, simply select the check-boxes of the test sets you want to copy and then select the Edit > Copy Items menu option. This will copy the current test set selection to the clipboard. Then select the place where you want the test sets to be inserted and choose the Edit > Paste Items option.

The test sets will now be copied into the destination you specified. The name of the copied test sets will be prefixed with “Copy of...” to distinguish them from the originals.

### 5.7.8. Moving Test Sets

There are two options for moving test sets or folders:

1. Click on the test set/folder you want to move in the right hand list and drag it to the folder in the left hand folder tree you want it moved to. The background of the new folder will change to show where it will be inserted:



Once you have the test set/folder positioned at the correct place that you want it inserted, just release the mouse button. To move multiple items simply select their checkboxes and then drag-and-drop one of the selected items.

2. Alternatively you can simply select the check-boxes of the test sets you want to move and then select the Edit > Cut Items menu option. This will cut the current test set selection to the clipboard. Then select the place where you want the test cases to be inserted and choose the Edit > Paste Items option. The test sets will now be moved into the destination specified.

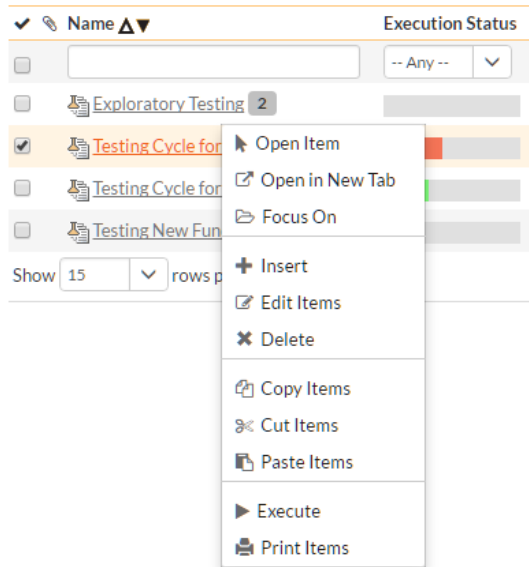
### 5.7.9. Printing or Exporting Items

To quickly print a single test set, test set folder or list of test sets you can select the items' checkboxes and then click Tools > Print Items. This will display a popup window containing a printable version of the selected items.

Alternatively you can save the selected items into a number of formats, available via the Tools dropdown.

### 5.7.10. Right-Click Context Menu

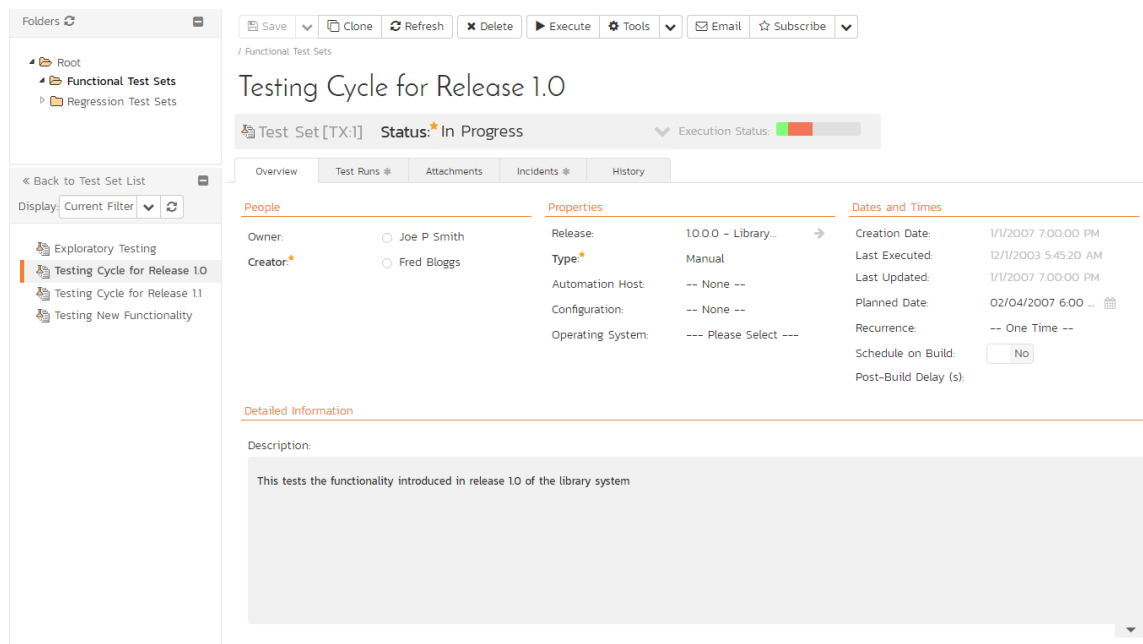
SpiraTeam® provides a shortcut – called the *context menu* - for accessing some of the most commonly used functions, so that you don't need to move your mouse up to the toolbar each time. To access the context menu, right-click on any of the rows in the test set list and the following menu will be displayed:



You can now choose any of these options as an alternative to using the icons in the toolbar.

## 5.8. Test Set Details

When you click on a test set item in the test set list described in the previous section, you are taken to the test set details page illustrated below:



This page is made up of *three* areas;

1. the left pane displays the test set folders and list navigation;

2. the right pane's header, which displays: the operations toolbar; the editable name of the selected test set; and the info bar (with a shaded background), which also contains the workflow status transitions (see below); and
3. the right pane's tabbed interface with rich information related to the test set.

The navigation pane consists of a link that will take you back to the test set list, as well as a list of the peer test sets to the one selected. This latter list is useful as a navigation shortcut; you can quickly view the detailed information of all the peer test sets by clicking on the navigation links without having to first return to the test sets list page. The navigation list can be switched between three different modes:

- The list of test sets matching the current filter
- The list of all test sets, irrespective of the current filter
- The list of test sets assigned to the current user

If you are editing an existing item, the fields that are available and the fields that are required will depend on your stage in its workflow. The types of change allowed and the email notifications that are sent will depend on how your project administrator has setup the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring workflows to meet their needs.

Depending on the user's role and whether they are listed as the owner or author of the test case, displayed in the info bar beneath the test case name is the current workflow status and an "operations" button which, when clicked, will show a set of allowed workflow operations. These workflow transitions allow the user to move the item from one status to another.

The top part of the right pane allows you to view and/or edit the details of the particular test set. You can edit the name and once you are satisfied any changes to the test set, click the "**Save**" button at the top of the page to commit the changes (or the options available via the save dropdown). In addition you can delete the current artifact by choosing "**Delete**", discard any changes made by clicking "**Refresh**", create a duplicate of the current artifact by clicking "**Clone**", or export to a number of files formats or print it via one of the options in the Tools dropdown menu.

The "**Execute**" button allows you to execute all the tests in the set against the release specified in the test set.

Using the "**Email**" button on the toolbar, you can send an email containing details of the requirement to an email address or another user on the system:

**Email this artifact to**

**Project User:** Amy E Cribbins   
Select a user in the project to send to.

**Email Addresses:**   
A list of email addresses, separated by ;

**Message Subject:**   
Leave blank for default.

Ranking:

You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user. The content of the email is specified in the System Administration – Notification Templates.

To be notified of any changes made to the current artifact via email, click the “[Subscribe](#)” button. If you already subscribed, the button will instead let you “[Unsubscribe](#)” to stop receiving emails about that particular artifact.

The lower part of the right pane can be switched between different views by clicking the appropriate tab. Initially the pane will be in “Overview” mode, but it can be switched to “Test Runs”, “Attachments”, “Incidents” and “History” modes if so desired. Each of the views is described separately below.

### 5.8.1. Overview – Details

The top part of this tab displays the various standard fields and custom properties associated with the test set. Fields (both standard and custom) are grouped under the collapsible headings (marked by orange text and underline) in the screenshot below. For instance, all fields regarding dates are grouped together in the “Dates and Times” area.

The Detailed Information section contains the long, formatted description of the test case, as well as any rich text custom fields. You can enter rich text or paste in from a word processing program or web page. Clicking on the shaded areas of one of these detailed fields will display the rich text toolbar.

Overview Test Runs \* Attachments Incidents \* History

People	Properties	Dates and Times
Owner: <input type="radio"/> Joe P Smith	Release: 1.0.0.0 - Library...	Creation Date: 1/1/2007 7:00:00 PM
Creator: * <input type="radio"/> Fred Bloggs	Type: * Manual	Last Executed: 12/1/2003 5:45:20 AM
	Automation Host: -- None --	Last Updated: 1/1/2007 7:00:00 PM
	Configuration: -- None --	Planned Date: 02/04/2007 6:00 ... 📅
	Operating System: --- Please Select ---	Recurrence: -- One Time --
		Schedule on Build: <input type="button" value="No"/>
		Post-Build Delay (s):

Detailed Information

Description:

This tests the functionality introduced in release 1.0 of the library system

Test Sets can be specified as being either for “Manual” or “Automated” test runs (via the “Type” field. If you choose Manual, then the test set can be executed by a tester from their “My Page.” However if you choose “Automated”, the test set will be executed by the automation host you specified. In this case, the *planned date and time* will be used by the automated test engine to know when to execute the automated test scripts. For manual test sets, only the date component is used. In addition, you can specify a *recurrence schedule* for the test set by changing the recurrence dropdown from “One Time” to “Hourly”, “Daily”, etc. so that SpiraTeam executes the same test set according to the specified frequency. The “Planned Date” field lets you specify the date and time to execute the test using the popup time picker.

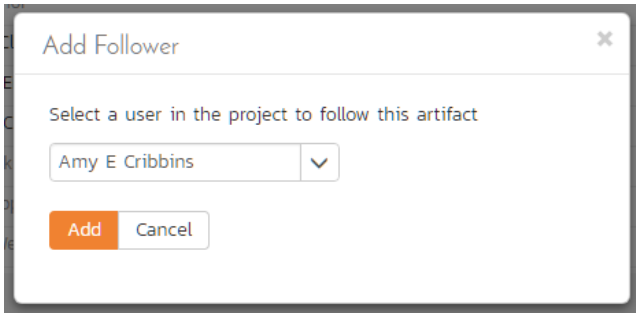
The **Schedule on Build** field will tell SpiraTest to automatically set the Planned Date to the current date/time plus the **Post Build Wait Time** offset (in seconds) whenever a new build is performed against the release or iteration that the test set is scheduled for. This allows you to automatically run a set of regression tests immediately after a build is completed.

The Description section contains the long, formatted description of the test set. You can enter rich text or paste in from a word processing program or web page.

### 5.8.2. Overview - Followers

Using the “**Subscribe**” button on the toolbar, you can quickly follow the item, and receive updates on certain changes to it. Depending on your role, you may also see a dropdown to this button, which let’s you add another project member as a follower to this item.

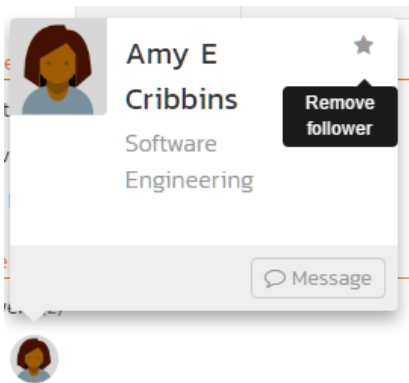




You can also quickly see who is following an incident under the “People” section in the Overview tab.



To view information about the follower, or to unfollow them from the item, hover over their avatar to display a user profile card.




### 5.8.3. Overview - Comments


The Comments section allows users to add and view discussions relating to the test set:














Comments

Displaying newest first oldest first

Wednesday, November 19, 2003 7:00:00 PM  
 Fred Bloggs  
 Thanks, appreciate it!

Monday, November 10, 2003 7:00:00 PM  
 Joe P Smith  
 OK will make sure that we do.

Sunday, November 9, 2003 7:00:00 PM  
 Fred Bloggs  
 We need to add a better definition of the pre-conditions and post-conditions

Format   Font   Size   **B**   *I*   U   ~~X~~   A   A                                 Source

Add Comment


Existing comments are displayed by date (either newest-first or oldest-first) above the text box. To add a comment to the Test Set, enter your text into the textbox, then click the “[Add Comment](#)” button.







#### 5.8.4. Overview - Parameters

As discussed in section 5.2.2.10, test cases can have parameters associated with them. This enables one test case to be called several times and have different parameters passed in each case, making the operation different. E.g. you could have a generic “login to application” test case that others call as an initial step, which could be provided with different login information depending on the calling test case. In addition these parameters may be used by certain test automation engines.

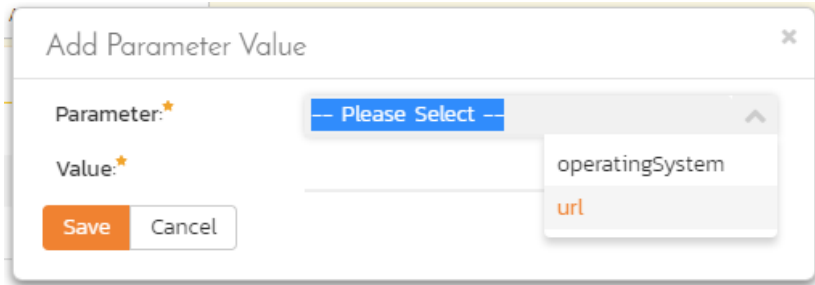
The Parameters section on the test set page lets you set a shared value for all of the parameters contained within the different test cases of the test set. The screenshot below shows that there are three parameters contained in the test cases that have been set at the test set level. In this example, every case that has a Parameter called ‘browserName’ will have its value set to ‘Safari’. This is a quick way of setting values for many test cases at once. Test Set Values will override any default values of a Parameter (defined for each specific test case).

Parameters

 The following parameter values have been specified at the test set level. [+ Add Parameter Value](#)

Parameter	Test Set Value	Default Value	Operations
\$(browserName)	Safari	browser	 Edit  Delete
\$(login)	librarian	-	 Edit  Delete
\$(password)	librarian	-	 Edit  Delete

You can add any additional Parameters not already set by clicking on the “[Add Parameter Value](#)” button. In this example, you can see that one of the parameters not yet set is called ‘url’.



You can also delete an existing Parameter specified for the whole test set by clicking the “[Delete](#)” button in the Operations column of the Parameter in question. Clicking the “[Edit](#)” button will let you alter the Test Set Value.

Parameter	Test Set Value	Default Value	Operations
\$(browserName)	Safari	browser	Save Cancel Delete
\$(login)	librarian	-	Edit Delete
\$(password)	librarian	-	Edit Delete

Note that the Default Value is derived from the test cases that use a specific Parameter. It is shown in this table for information only—to help testers know what value will be run in the absence of specifying a Test Set Value.

### 5.8.5. Overview - Test Cases

This section displays the list of test cases contained within the test set. You can add, remove, reposition and remove test cases from the list. The execution status displayed next to each test case is the most recent execution status of the test case *when run in the context of the current test set*.

Test Cases

Est. Dur. 0.7h / Act. Dur. 4.3h

<input type="checkbox"/>	Test Case Name	Owner	Priority	Est. Dur.	Act. Dur.	Last Executed	Type	Execution Status	ID	Edit
<input type="checkbox"/>	Ability to create new book		1 - Critical	0.2h	1.3h	1-Dec-2003	Functional	Failed	TC.2	Edit
<input type="checkbox"/>	Ability to edit existing book		1 - Critical	0.1h	1.5h	1-Dec-2003	Functional	Passed	TC.3	Edit
<input type="checkbox"/>	Ability to create new author		1 - Critical	0.1h	1.5h	1-Dec-2003	Functional	Failed	TC.4	Edit
<input type="checkbox"/>	Ability to edit existing author		2 - High	0.1h			Functional	Not Run	TC.5	Edit
<input type="checkbox"/>	Ability to reassign book to different author		2 - High	0.1h			Functional	Not Run	TC.6	Edit
<input type="checkbox"/>	Book management		2 - High	0.1h			Regression	Not Run	TC.8	Edit
<input type="checkbox"/>	Author management		2 - High	0.1h			Regression	Not Run	TC.9	Edit

Show 15 rows per page      Displaying page 1 of 1

To move the test cases, click the test case icon and drag it to the appropriate position in the list.

To modify an existing Test Case click the **“Edit”** button in the right-most column, or *double-click* on the cells in the row. That will switch the selected row into Edit mode. The owner field can then be set at the test case level. This is useful in situations where you want the different test cases in the set to be executed by different testers (e.g. in integrated, scenario tests)

<input type="checkbox"/> Test Case Name	Owner	Priority	Est. Dur.	Act. Dur.	Last Executed	Type	Execution Status	ID	Edit
<input type="checkbox"/> Ability to create new book		1 - Critical	0.2h	1.3h	1-Dec-2003	Functional	Failed	TC.2	Edit
<input type="checkbox"/> Ability to edit existing book		1 - Critical	0.1h	1.5h	1-Dec-2003	Functional	Passed	TC.3	Edit
<input type="checkbox"/> Ability to create new author	-- None --	1 - Critical	0.1h	1.5h	1-Dec-2003	Functional	Failed	TC.4	Save Cancel
<input type="checkbox"/> Ability to edit existing author		2 - High	0.1h			Functional	Not Run	TC.5	Edit

To add a new test case to the Test Set, click on the **“Add”** button to display the panel:

**Test Cases**

Root

~ No matches found: ~

---

Est. Dur. 0.7h / Act. Dur. 4.3h

First, select the folder containing the test cases desired. You can then select the checkboxes of the individual test cases that you want to add to the test set (note: clicking the checkbox in the header row of the table will select every test case in the currently selected folder). Once you have selected the desired items, click the **“Save”** button to add them to the test set.

As discussed above in section 5.8.4, test cases can have parameters defined with specific values. These are created on the Test Case details page (see section 5.2.2.10.). If you need to specify different values for a parameter for different test cases in the test set, you can override both any default parameter values and any test set parameter values. To do so, click “Edit Parameters” for the required test case in this view. You can do this by either select the checkbox of a test set and click “Edit Parameters” at the top of the section, or right-click on the test case and choose “Edit Parameters”:

You can then specify the values of the parameters that the test set will pass to this specific test case. Once you have entered / modified the values, click “**Save**” to commit the changes.

### 5.8.6. Overview - Comments

The Comments section allows users to add and view discussions related to the Test Set:

Existing comments are displayed by date (either newest-first or oldest-first) above the text box. To add a comment to the Test Set, enter your text into the textbox, then click the “**Add Comment**” button.

### 5.8.7. Test Runs

This tab displays the list of all the test runs executed against the test set. Each test run is listed together with the date of execution, the name of the test case, the name of the tester, the release/version of the system that the test was executed against, the overall execution status for the test case in that run and a link to the actual test run details (see section 5.6). In addition, you can choose to display any of the custom properties associated with the test run.

Overview | Test Runs \* | Attachments | Incidents \* | History

Refresh | Filter | -- Show/hide columns --

Displaying 1 - 3 out of 3 test run(s). Filtering results by Test Set. Clear Filters

✓ Name ▲▼	End Date ▲▼	Type ▲▼	Tester ▲▼	Release ▲▼	Execution Status ▲▼	Act. Dur. ▲▼	ID ▲▼	Edit
<input type="checkbox"/>		-- Any --	-- Any --	-- Any --	-- Any --		TR	Edit
<input type="checkbox"/> Ability to edit existing book	1-Dec-2003	Manual	Fred Bloggs	1.0.0.0	Passed	1.5h	TR.3	Edit
<input type="checkbox"/> Ability to create new author	1-Dec-2003	Manual	Joe P Smith	1.0.0.0	Failed	1.5h	TR.4	Edit
<input type="checkbox"/> Ability to create new book	1-Dec-2003	Manual	Joe P Smith	1.0.0.0	Failed	1.3h	TR.1	Edit

Show 15 rows per page | Displaying page 1 of 1

The “Show/hide columns” drop-down list allows you to change the fields that are displayed in the test run list as columns. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. The displayed columns can be any standard field or custom property.

You can also filter the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “Filter” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.

### 5.8.8. Attachments

This tab displays the list of documents that have been “attached” to the test set. The documents can be in any format, though SpiraTeam® will only display the icon for certain known types.

Overview | Test Runs | Attachments | Incidents | History

+ Add New | Add Existing | Remove | Refresh | -- Show/hide columns -- | Filter

Displaying 1 - 0 out of 0 attachment(s).

✓ Filename ▲▼	Type ▲▼	Size ▲▼	Edited By ▲▼	Edited On ▲▼
<input type="checkbox"/>	-- Any --		-- Any --	

Show 15 rows per page

The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To actually view the document, click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To remove an existing attachment from a test set, select an attachment using the checkbox and click the “**Remove**” button. The attachment will be removed from the list.

To attach a new document to the test set, you need to first click the “**Add New**” link to display the new attachment dialog box:

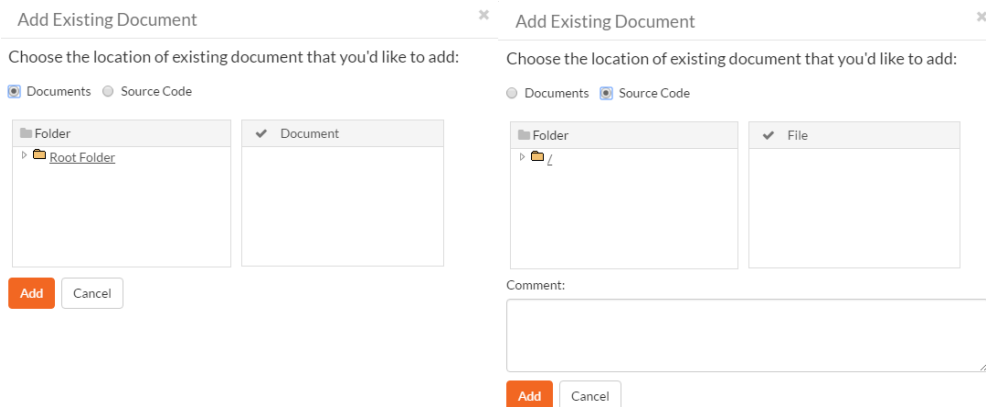
The image shows three instances of the 'Add New Document' dialog box. The first dialog has 'File' selected as the type, with a 'Choose File' button and 'no file chosen' text. The second dialog has 'URL' selected, with a text input field for the URL. The third dialog has 'Screenshot' selected, with a large text area for pasting the image and a note: 'Please paste your image using the CTRL+V keyboard command.' All three dialogs have fields for 'Description', 'Document Type' (set to 'Functional Specification'), 'Document Folder' (set to 'Root Folder'), and 'Tags', along with 'Upload' and 'Cancel' buttons.

There are three different types of item that can be attached to a requirement:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the “**Upload**” button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the “**Upload**” button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “**Upload**” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

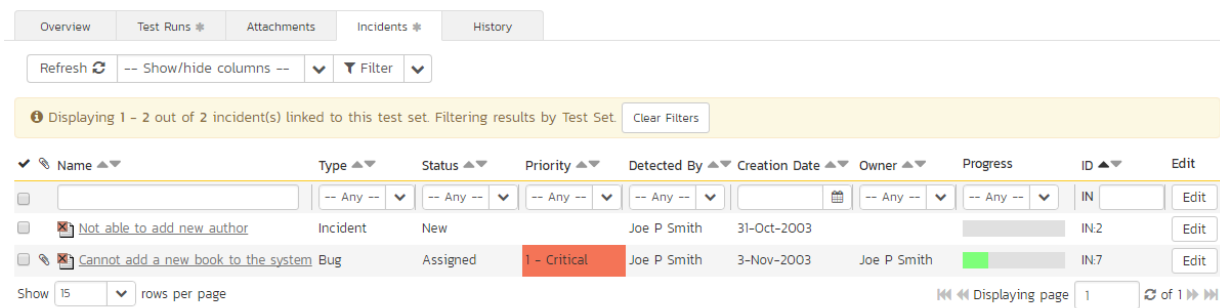
You can also associate an existing document (that's already stored in SpiraTeam) with the test set. To do that, click on the "[Add Existing](#)" button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

### 5.8.9. Incidents

This tab displays the list of incidents associated with the current test set. Each incident will either have been: created during the execution of a test case in the test set (and are thereby linked to one of the test runs); or manually linked to one of the test steps in a test case of the set.



### 5.8.10. History

This tab displays the list of changes that have been performed on the test set artifact since its creation. The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the "[Admin View](#)" button to revert any unwanted changes.

## 5.9. Automation Host List

This section outlines how to use the Automation Host Management features of SpiraTeam® to manage the different host systems that will be running automated tests in your environment. Typically when scheduling automated tests you will want to execute the same tests on multiple computers running different environments.

SpiraTeam allows you to build a master list of automation hosts in each project, which can be used to schedule test sets containing automated test cases against. Please refer to the Test Set section of this manual for more information on managing and scheduling test sets.

When you click on the Testing > Automation Hosts global navigation link, you will initially be taken to the automation host list screen illustrated below:

Name	Token	Active	Last Updated	ID	Web Browser	Operating System	Edit
Windows 8 Host	Win8	Yes	30-Apr-2014	AH1	Internet Explorer	Windows 8	Edit
Windows Vista Host #1	WinVista1	Yes	1-May-2014	AH2	Internet Explorer	Windows Vista	Edit
Windows Vista Host #2	WinVista2	Yes	1-May-2014	AH3	Mozilla / Firefox	Windows Vista	Edit
Windows 7 Host	Win7	Yes	3-May-2014	AH4	Internet Explorer	Windows 7	Edit

The automation host list screen displays all the automation hosts entered for the current project, in a filterable, sortable grid. The grid displays the automation host ID together with fields such as name, description, last updated date, token, and any custom properties. The choice of columns displayed is configurable per-user, per-project, giving extensive flexibility when it comes to viewing and searching automation hosts.

In addition, you can view a more detailed description of the automation host by positioning the mouse pointer over the host name hyperlink and waiting for the popup “tooltip” to appear. If you click on the host name hyperlink, you will be taken to the automation host details page described in section 5.10. Clicking on any of the pagination links at the bottom of the page will advance you to the next set of hosts in the list according to the applied filter and sort-order. There is also a drop-down-list at the bottom of the page which allows you to specify how many rows should be displayed in each page, helping accommodate different user preferences.

One special column that is unique to automation hosts is the “Token” field. This needs to contain a short textual identifier that uniquely identifies each automation host in the project. This will be used by each host computer to identify itself to SpiraTeam.



### 5.9.1. Sorting and Filtering

You can easily filter and sort the list of automation hosts. To filter the list by one of the displayed fields, you simply choose an item from the appropriate drop-down list or enter a free-text phrase then click "[Filter](#)" or press the <ENTER> key to apply the different filters. Note that the name field is searched using a "LIKE" comparison, so that searching for "database" would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, automation host numbers).

To change the column that is sorted, or to change the direction of the current sort, simply click on the up/down arrow icon in the appropriate column. The currently sorted column is indicated by the darker arrow.

Clicking on Filter > Clear Filter removes any set filters and expands the host list to display all automation hosts in the current project, and clicking on Filter > Save Filter allows you to save the filter to your 'My Page' for use in the future. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter.

### 5.9.2. New Host

Clicking on the "[New Host](#)" button adds a new automation host to the bottom of the automation host list with a default name and token.

### 5.9.3. Delete

Clicking on the "[Delete](#)" button deletes the automation hosts whose check-boxes have been selected in the host list.

### 5.9.4. Refresh

Clicking on the "[Refresh](#)" button reloads the list of automation hosts; this is useful when new hosts are being added by other users, and you want to make sure you have the most up-to-date list displayed.

### 5.9.5. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the host list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of "Show..." column names and to hide an existing column, simply select that column from the list of "Hide..." column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

### 5.9.6. Edit

Each automation host in the list has an **Edit** button in its right-most column. When you click this button or just *double-click* on any of the cells in the row, you change the item from “View” mode to “Edit” mode. The various columns are made editable, and **Save** and **Cancel** buttons are displayed in the last column.

If you click **Edit** on more than one row, the **Save** and **Cancel** buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one **Save** button. Also, if you want to make the same change to multiple rows (e.g. to change five automation hosts from Active = No to Active = Yes), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the **Edit** button on the same row as the Filters and it will switch all the selected items into edit mode.

When you have made your updates, you can either click **Save** to commit the changes, or **Cancel** to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

## 5.10. Automation Host Details

When you click on an automation host entry in the host list, you are taken to the automation host details page illustrated below:

The screenshot shows a web interface for managing automation hosts. On the left is a sidebar with a list of hosts: 'Windows 8 Host', 'Windows Vista Host #1', 'Windows Vista Host #2', and 'Windows 7 Host'. The main content area is titled 'Windows 8 Host' and shows details for 'Automation Host [AH:1]'. At the top of the main area are buttons for 'Save', 'Refresh', and 'Delete'. Below the title are tabs for 'Overview', 'Test Runs', 'Attachments', and 'History'. The 'Overview' tab is active, displaying 'Properties' and 'Dates and Times'. The 'Properties' section includes: 'Token: Win8', 'Active: Yes' (with a green checkmark), 'Web Browser: Internet Explorer', 'Operating System: Windows 8', and 'OS Version:'. The 'Dates and Times' section includes: 'Creation Date: -' and 'Last Updated: 4/30/2014 8:00:00 PM'. Below this is a 'Detailed Information' section with a 'Description' field containing the text: 'Windows 8 with IE10, Firefox 14, Chrome and Safari 5'. At the bottom left of the interface, there is a 'Show 15 rows' control.

This page is made up of three areas; the left pane is the navigation window, the upper part of the right pane contains the automation host name and ID, and the bottom part of the right pane displays different information associated with the automation host.

The navigation pane consists of a link that will take you back to the host list, as well as a list of the peer automation hosts to the one selected. This latter list is useful as a navigation shortcut; you can quickly view the peer hosts by clicking on the navigation links without having to first return to the host list page. The navigation list can be switched between two different modes:

- The list of hosts matching the current filter
- The list of all hosts, irrespective of the current filter

The top part of the right pane allows you to view and/or edit the details of the particular automation host. You can edit the various fields (name, description, token, etc.) and custom properties. Once you are satisfied with the changes, click either the **“Save”** button or the alternative options from the **“Save”** dropdown list. In addition you can delete the current automation host by clicking **“Delete”**, or discard any changes made by clicking **“Refresh”**.

### 5.10.1. Overview

This tab shows the fields and description associated with the automation host. Standard and custom fields are grouped by type (eg all date and time fields are grouped together).

### 5.10.2. Test Runs

This tab displays the list of all the test runs executed against the automation host. Each test run is listed together with the date of execution, the name of the test case, the name of the tester, the release/version of the system that the test was executed against, the name of the test set (if applicable), the overall execution status for the test case in that run and a link to the actual test run details (see section 5.6). In addition, you can choose to display any of the custom properties associated with the test run.

Overview									
Test Runs *									
Attachments									
History									
<input type="button" value="Refresh"/> <input type="button" value="Filter"/> <input type="button" value="-- Show/hide columns --"/>									
Displaying 1 - 3 out of 3 test run(s). Filtering results by Automation Host. <input type="button" value="Clear Filters"/>									
✓ Name	End Date	Type	Tester	Release	Execution Status	Act. Dur.	ID	Edit	
<input type="checkbox"/>		-- Any --	-- Any --	-- Any --	-- Any --		TR	<input type="button" value="Edit"/>	
<input type="checkbox"/>	Ability to create new book	4-Dec-2003	Automated	Fred Bloggs	11.0.0.0003	Failed	12h	TR:18	<input type="button" value="Edit"/>
<input type="checkbox"/>	Ability to edit existing book	4-Dec-2003	Automated	Fred Bloggs	11.0.0.0003	Failed	12h	TR:19	<input type="button" value="Edit"/>
<input type="checkbox"/>	Ability to create new author	4-Dec-2003	Automated	Fred Bloggs	11.0.0.0003	Caution	12h	TR:20	<input type="button" value="Edit"/>
Show <input type="text" value="15"/> rows per page <span style="float: right;"> <input type="button" value="←"/> <input type="text" value="1"/> <input type="button" value="→"/> </span>									

The “Show/hide columns” drop-down list allows you to change the fields that are displayed in the test run list as columns. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. The displayed columns can be any standard field or custom property.

You can also filter the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.

### 5.10.3. Attachments

In this tab, the main pane displays the list of documents that have been “attached” to the automation host. The documents can be in any format, though SpiraTeam® will only display an icon for certain known types.

The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To delete an existing attachment from a test case, simply click the “**Remove**” button and the attachment will be removed from the list.

To attach a new document to the test case, you need to first click the “**Add New**” link to display the new attachment dialog box:

The image shows three instances of the "Add New Document" dialog box, each with a different type selected:

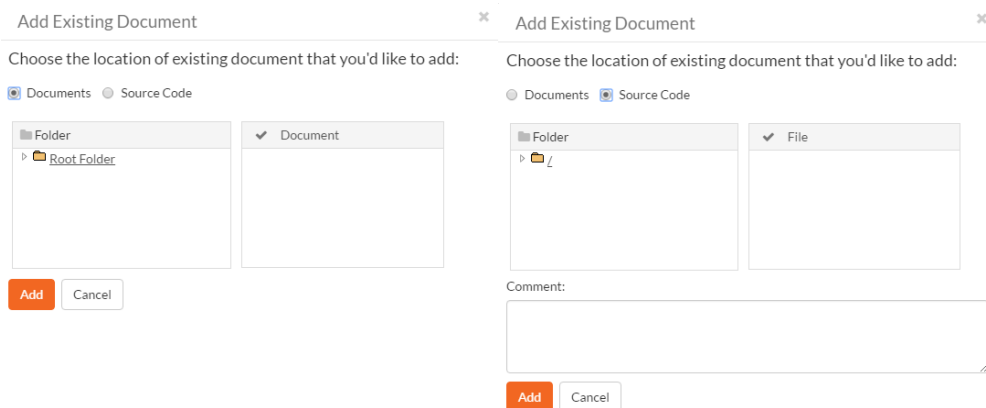
- Instance 1 (File):** Type: File (selected), URL, Screenshot. Fields: Filename (Choose File), Description, Document Type (Functional Specification), Document Folder (Root Folder), Tags. Buttons: Upload, Cancel.
- Instance 2 (URL):** Type: File, URL (selected), Screenshot. Fields: URL, Description, Document Type (Functional Specification), Document Folder (Root Folder), Tags. Buttons: Upload, Cancel.
- Instance 3 (Screenshot):** Type: File, URL, Screenshot (selected). Fields: Screenshot (image area), Description, Document Type (Functional Specification), Document Folder (Root Folder), Tags. Note: Please paste your image using the CTRL+V keyboard command. Buttons: Upload, Cancel.

There are three different types of item that can be attached to an incident:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the “**Upload**” button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the “**Upload**” button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “**Upload**” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the automation host. To do that, click on the “**Add Existing**” button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

#### 5.10.4. History

In this mode, the main pane displays the list of changes that have been performed on the automation host artifact since its creation. The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “[Admin View](#)” button to revert any unwanted changes.

#### 5.11. Test Configurations List

This section outlines how to use the Test Configuration features of SpiraTeam® to create and manage different configurations of parameters that tests (both manual and automated) can be run against. This offers tools to quickly create every combination of different parameters.

When you click on the Testing > Test Configuration global navigation link, you will initially be taken to the test configuration list screen illustrated below:

Displaying 1 - 3 out of 3 test configuration(s) for project.

Name	Creation Date	Active	Last Updated	ID	Edit
<a href="#">Target web browsers and operating systems</a>	30-Jun-2017	Yes	1-Jul-2017	TG-1	Edit
<a href="#">List of library information system logins and passwords</a>	1-Jul-2017	Yes	4-Jul-2017	TG-2	Edit
<a href="#">Complete testing data with browsers, operating systems and logins</a>	2-Jul-2017	Yes	2-Jul-2017	TG-3	Edit

Show 15 rows per page

Displaying page 1 of 1

The test configuration list screen displays all the test configurations for the current project, in a filterable, sortable grid. The grid displays the name, creation date, last updated date, ID, and whether the test configuration is active.

In addition, you can view a more detailed description of the test configuration by positioning the mouse pointer over the host name hyperlink and waiting for the popup “tooltip” to appear. If you click on the host name hyperlink, you will be taken to the test configuration details page described in section 5.12. Clicking on any of the pagination links at the bottom of the page will advance you to the next set of hosts in the list according to the applied filter and sort-order. There is also a drop-down-list at the bottom of the page which allows you to specify how many rows should be displayed in each page, helping accommodate different user preferences.

##### 5.11.1. Sorting and Filtering

You can easily filter and sort the list of automation hosts. To filter the list by one of the displayed fields, you simply choose an item from the appropriate drop-down list or enter a free-text phrase then click

“[Filter](#)” or press the <ENTER> key to apply the different filters. Note that the name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, test configuration numbers).

To change the column that is sorted, or to change the direction of the current sort, simply click on the up/down arrow icon in the appropriate column. The currently sorted column is indicated by the darker arrow.

Clicking on Filter > Clear Filter removes any set filters.

### 5.11.2. New Test Configuration

Clicking on the “[New Configuration](#)” button adds a new test configuration to the bottom of the list with a default name.

### 5.11.3. Delete

Clicking on the “[Delete](#)” button deletes the test configurations whose check-boxes have been selected in the host list.

### 5.11.4. Refresh

Clicking on the “[Refresh](#)” button reloads the list of test configurations; this is useful when new configurations are being added by other users, and you want to make sure you have the most up-to-date list displayed.

### 5.11.5. Edit

Each test configuration in the list has an “[Edit](#)” button in its right-most column. When you click this button or just *double-click* on any of the cells in the row, you change the item from “View” mode to “Edit” mode. The various columns are made editable, and “[Save](#)” and “[Cancel](#)” buttons are displayed in the last column.

If you click “[Edit](#)” on more than one row, the “[Save](#)” and “[Cancel](#)” buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one “[Save](#)” button. Also, if you want to make the same change to multiple rows (e.g. to change five test configurations from Active = No to Active = Yes), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the “[Edit](#)” button on the same row as the Filters and it will switch all the selected items into edit mode.

When you have made your updates, you can either click “**Save**” to commit the changes, or “**Cancel**” to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

## 5.12. Test Configuration Details

When you click on a test configuration entry in the list, you are taken to the test configuration details page illustrated below:

« Back to Configurations List

Display: Current Filter

Save Refresh Delete

### Target web browsers and operating systems

Test Configuration Set [TG:1]

Overview Test Sets

**Properties**

Active\* Yes

**Dates and Times**

Creation Date: 6/30/2017 8:00:00 PM  
Last Updated: 7/1/2017 8:00:00 PM

**Detailed Information**

Description:

This set of data consists of all the web browsers and operating systems that the application needs to be tested with

**Test Configuration Entries**

+ Populate Remove Refresh

Displaying 6 out of 6 entries in this test configuration set.

<input type="checkbox"/>	\$(browserName)	\$(operatingSystem)	ID
<input type="checkbox"/>	Internet Explorer	Windows 7	1
<input type="checkbox"/>	Mozilla / Firefox	Windows 7	2
<input type="checkbox"/>	Opera	Windows 7	3
<input type="checkbox"/>	Internet Explorer	Windows 8	4
<input type="checkbox"/>	Mozilla / Firefox	Windows 8	5
<input type="checkbox"/>	Opera	Windows 8	6

Show 15 rows per page

Displaying page 1 of 1

This page is made up of three areas; the left pane is the navigation window, the upper part of the right pane contains the test configuration name and ID, and the bottom part of the right pane displays different information associated with the test configuration.

The navigation pane consists of a link that will take you back to the test configuration list, as well as a list of the peer test configurations to the one selected. This latter list is useful as a navigation shortcut; you can quickly view the peer configurations by clicking on the navigation links without having to first return to the list page. The navigation list can be switched between two different modes:

- The list of configurations matching the current filter
- The list of all configurations, irrespective of the current filter



The right pane allows you to view and/or edit the details of the particular test configuration. You can edit the various fields (name, description, etc.) and custom properties. Once you are satisfied with the changes, click either the **“Save”** button or the alternative options from the **“Save”** dropdown list. In addition you can delete the current automation host by clicking **“Delete”**, or discard any changes made by clicking **“Refresh”**.

### 5.12.1. Overview

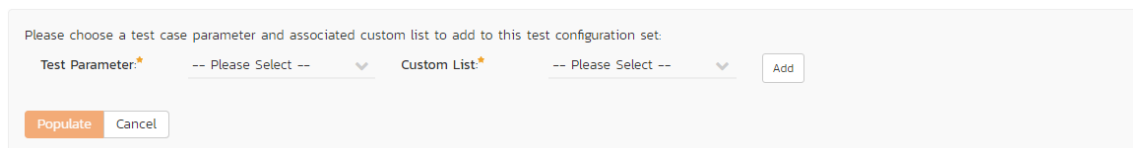
This tab shows the fields and description associated with the test configuration. Standard and custom fields are grouped by type (eg all date and time fields are grouped together).

### 5.12.2. Overview – Test Configuration Entries

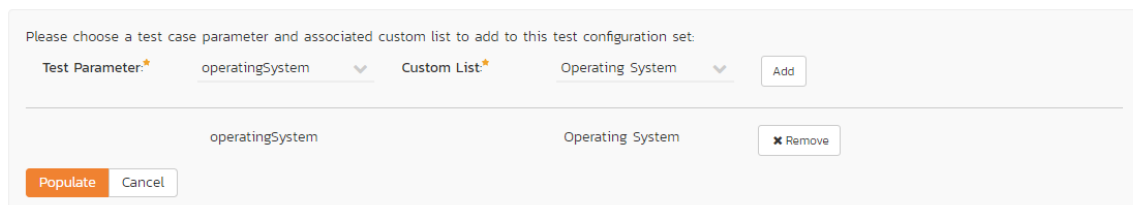
This section shows the list of all entries from this test configuration, and that would be used by a test set to populate parameters. Each row represents a single unique combination of the parameters (shown on the header row of the table).

Entries can be reordered by dragging and drop one row or more. Individual entries can also be removed by checking the checkbox for that entry and then clicking **“Remove”** button.

To create new entries, first click the **“Populate”** button. This will display the following panel:



You must select a parameter from the left dropdown (which contains a list of all parameters defined in test cases in the current project), and a custom list with which to populate the parameter. Then click the **“Add”** button. For instance, the screenshot below would create a configuration using every operating system defined by the custom list “Operating System” and assigning these to the parameter called “operatingSystem.”



Note: Custom lists are usually used in SpiraTeam for custom fields on various artifacts. However, you can create custom lists that are solely for the purpose of test configurations, should you so wish – for instance, to contain a list of usernames.

Once you are happy with the lists and parameters selected, click the “**Populate**” button. This will overwrite all existing entries in this test configuration. It will create every combination based on the lists specified. So if you select two parameters, each with a list that has ten items, one hundred entries will be created in the test configuration.

### 5.12.3. Test Runs

This tab displays the list of all the test runs executed against the test configuration. Each test run is listed together with the date of execution, the name of the test case, the name of the tester, the release/version of the system that the test was executed against, the name of the test set (if applicable), the overall execution status for the test case in that run and a link to the actual test run details (see section 5.6). In addition, you can choose to display any of the custom properties associated with the test run.

The screenshot shows a web interface for managing test sets. At the top, there are two tabs: 'Overview' and 'Test Sets'. Below the tabs, there is a 'Refresh' button, a 'Show/hide columns' dropdown menu, and a 'Filter' button. A status message indicates 'Displaying 1 - 0 out of 6 test set(s) using this test configuration. Filtering results by Configuration.' There is a 'Clear Filters' button next to it. Below this, there is a table header with columns: Name, Execution Status, Planned Date, Release, Last Executed, Owner, Status, ID, and Edit. Each column has a small dropdown arrow. Below the header, there is a row of input fields for each column, with a 'Show' button on the left and a 'rows per page' dropdown set to 15. On the right, there is a 'Displaying page 1 of 0' indicator and a 'Refresh' button.

The “Show/hide columns” drop-down list allows you to change the fields that are displayed in the test run list as columns. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. The displayed columns can be any standard field or custom property.

You can also filter the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.

## 6. Incident Tracking

This section outlines how the incident/defect tracking features of SpiraTeam® can be used to manage key project artifacts during the software development lifecycle. In addition to managing the defects raised during the execution of test cases in the test management module, the Incident Tracker is also a powerful risk/issue/bug tracking system in its own right. When coupled with the project dashboard (see section 3.4) it is a powerful tool for representing all the key risks and issues associated with a project in a single, graphical format.

Unlike a standalone bug/issue tracking tool however, you can trace the incidents/defects back to the test case and the underlying requirement that generated them, giving the project manager unprecedented power in analyzing the “in-process” quality of a system during its lifecycle. This power is clearly illustrated in the “Requirement Incident Count” pane in the Project Home dashboard (see section 3.4.4).

### 6.1. Incident List

When you click on the Tracking > Incidents global navigation link, you will initially be taken to the incidents list screen illustrated below:

Incidents / Tasks / Resources / Source Code Role: Manager

Quick Filter

Displaying 1 - 15 out of 60 incident(s) for this project.

<input type="checkbox"/>	Name	Type	Status	Priority	Owner	Progress	ID	Edit
<input type="checkbox"/>	Doesn't let me add a new category	Bug	Resolved	4 - Low	Fred Bloggs	<div style="width: 100%;"></div>	IN10	<input type="button" value="Edit"/>
<input type="checkbox"/>	Permissions not updating when changed	Bug	Closed	4 - Low	Fred Bloggs	<div style="width: 100%;"></div>	IN14	<input type="button" value="Edit"/>
<input type="checkbox"/>	Ability to use different color schemes	Enhancement	Resolved	4 - Low	Joe P Smith	<div style="width: 100%;"></div>	IN24	<input type="button" value="Edit"/>
<input type="checkbox"/>	Ability to delete multiple authors	Enhancement	Closed	4 - Low	Fred Bloggs	<div style="width: 100%;"></div>	IN28	<input type="button" value="Edit"/>
<input type="checkbox"/>	Scalability of system	Issue	Closed	4 - Low	Joe P Smith	<div style="width: 100%;"></div>	IN34	<input type="button" value="Edit"/>
<input type="checkbox"/>	User expectations from old client app	Training	Open	4 - Low		<div style="width: 0%;"></div>	IN38	<input type="button" value="Edit"/>
<input type="checkbox"/>	Exporting data to excel	Training	Open	4 - Low		<div style="width: 0%;"></div>	IN39	<input type="button" value="Edit"/>
<input type="checkbox"/>	Test Training Item	Training	Closed	4 - Low	Joe P Smith	<div style="width: 100%;"></div>	IN43	<input type="button" value="Edit"/>
<input type="checkbox"/>	Test System Limitation	Limitation	Closed	4 - Low	Joe P Smith	<div style="width: 100%;"></div>	IN49	<input type="button" value="Edit"/>
<input type="checkbox"/>	Test Change Request	Change Request	Assigned	4 - Low	Joe P Smith	<div style="width: 25%;"></div>	IN54	<input type="button" value="Edit"/>
<input type="checkbox"/>	Sample Risk 3	Risk	Assigned	4 - Low	Fred Bloggs	<div style="width: 25%;"></div>	IN61	<input type="button" value="Edit"/>
<input type="checkbox"/>	The book listing screen doesn't sort	Bug	Open	3 - Medium		<div style="width: 0%;"></div>	IN6	<input type="button" value="Edit"/>
<input type="checkbox"/>	Editing the date on an author is clunky	Bug	Assigned	3 - Medium	Joe P Smith	<div style="width: 25%;"></div>	IN9	<input type="button" value="Edit"/>
<input type="checkbox"/>	The tables get cutoff on low-res modes	Bug	Closed	3 - Medium	Joe P Smith	<div style="width: 100%;"></div>	IN13	<input type="button" value="Edit"/>
<input type="checkbox"/>	Ability to import data from excel	Enhancement	Assigned	3 - Medium	Fred Bloggs	<div style="width: 25%;"></div>	IN23	<input type="button" value="Edit"/>

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 Displaying page 1 of 4

The incident list screen displays all the incidents entered for the current project, in a filterable, sortable grid. The grid displays the incident number together with fields such as incident type (bug, issue, risk,

etc.), status (new, open, etc.), priority, name, assigned owner, detection date, detector, closed date, etc. The choice of columns displayed is configurable per-user, per-project, giving extensive flexibility when it comes to viewing and searching incidents.

The sidebar on the left gives you quick access to saved filters, along with some useful charts to get an at-a-glance view of incidents for this project.

In addition, you can view a more detailed description of the incident (along with a resolution if any) by positioning the mouse pointer over the incident name hyperlink and waiting for the popup “tooltip” to appear. If you click on the incident name hyperlink, you will be taken to the incident details page described in section 6.2. Clicking on any of the pagination links at the bottom of the page will advance you to the next set of incidents in the list according to the applied filter and sort-order. There is also a drop-down-list at the bottom of the page which allows you to specify how many rows should be displayed in each page, helping accommodate different user preferences.

### 6.1.1. Sorting and Filtering

You can easily filter and sort the list of incidents as illustrated in the screen-shot below:

The screenshot shows a web interface for managing incidents. At the top, there are several action buttons: '+ New Incident', 'x Delete', 'Refresh', 'Filter', 'Clone', 'Tools', and 'Show/hide columns'. Below these is a status bar indicating 'Displaying 1 - 14 out of 14 Incident(s) for this project. Filtering results by Type.' and a 'Clear Filters' button. The main part of the interface is a table with columns: Name, Type, Status, Priority, Detected By, Creation Date, Owner, Progress, ID, and Edit. The table contains five rows of incident data, with the 'Priority' column highlighted in a gradient from red to yellow. The first row has a priority of '1 - Critical', the second '2 - High', the third '3 - Medium', the fourth '4 - Low', and the fifth '1 - Critical'. Each row has an 'Edit' button next to it.

Name	Type	Status	Priority	Detected By	Creation Date	Owner	Progress	ID	Edit
<input type="text"/>	Bug	-- Any --	-- Any --	-- Any --	<input type="text"/>	-- Any --	-- Any --	IN	Edit
<a href="#">Validation on the edit book page</a>	Bug	Resolved	1 - Critical	Fred Bloggs	14-Nov-2003	Joe P Smith	<div style="width: 100%;"></div>	IN:11	Edit
<a href="#">Quote handling issues throughout</a>	Bug	Resolved	2 - High	Fred Bloggs	14-Nov-2003	Fred Bloggs	<div style="width: 100%;"></div>	IN:12	Edit
<a href="#">The tables get cutoff on low-res modes</a>	Bug	Closed	3 - Medium	Joe P Smith	14-Nov-2003	Joe P Smith	<div style="width: 100%;"></div>	IN:13	Edit
<a href="#">Permissions not updating when changed</a>	Bug	Closed	4 - Low	Joe P Smith	14-Nov-2003	Fred Bloggs	<div style="width: 100%;"></div>	IN:14	Edit
<a href="#">Session handling</a>	Bug	Closed	1 - Critical	Joe P Smith	14-Nov-2003	Joe P Smith	<div style="width: 100%;"></div>	IN:15	Edit

To filter the list by incident type, status, priority, owner or detector name, you simply choose an item from the appropriate drop-down list, and for the other fields, you enter a free-text phrase then click “**Filter**” or press the <ENTER> key to apply the different filters. Note that the name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, incident numbers). There are also several aggregate filters that are used to filter on multiple values at once (e.g. filtering status on (All Open) will return any incident that is in one of the open statuses – new, open, assigned, reopen).

To change the column that is sorted, or to change the direction of the current sort, simply click on the up/down arrow icon in the appropriate column. The currently sorted column is indicated by the darker arrow. In the screen-shot above, we are filtering on type=bug and sorting by decreasing priority.

Clicking on Filter > Clear Filter removes any set filters and expands the incident list to display all incidents for the current project, and clicking on Filter > Save Filter allows you to save the filter to your 'My Page' for use in the future. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter.

As a shortcut, the left hand panel includes a set of **Quick Filters** that can be applied in a single-click:

- The topmost section displays any saved incident filters created by the current user or that are shared with the current user (the former are designated with an icon representing a single person, the latter a group of people)
- **Components** – This section lists the components defined for the current project. Clicking on any of the components in the list will filter the incidents to only show those that are associated with the selected component.
- **Releases** – This section lists the releases and iterations defined for the current project. Clicking on any of the releases or iterations in the list will filter the incident by that **resolved release/iteration**.

### 6.1.2. New Incident

Clicking on the “***New Incident***” button takes you to the new incident screen. This is essentially the same screen as the incident details screen shown in section 6.2 except, depending on how the workflow has been configured for your project, certain fields may be disabled. For more details on setting and up configuring workflow for your project, please refer to the *SpiraTest Administration Guide*.

### 6.1.3. Delete

Clicking on the “***Delete***” button deletes the incidents whose check-boxes have been selected in the incident list.

### 6.1.4. Refresh

Clicking on the “***Refresh***” button simply reloads the list of incidents; this is useful when new incidents are being added by other users, and you want to make sure you have the most up-to-date list displayed.

### 6.1.5. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the incident list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

### 6.1.6. Edit

Each incident in the list has an ***Edit*** button display in its right-most column. When you click this button or just *double-click* on any of the cells in the row, you change the item from “View” mode to “Edit” mode. The various columns are made editable, and ***Save*** and ***Cancel*** buttons are displayed in the last column:

Displaying 31 - 45 out of 60 Incident(s) for this project.

Name	Type	Status	Priority	Detected By	Creation Date	Owner	Progress	ID	Edit
<input type="checkbox"/>		-- Any --	-- Any --	-- Any --		-- Any --	-- Any --	IN	Edit
<input type="checkbox"/> Management of children's loans	Issue	Assigned	3 - Medium	Joe P Smith	30-Nov-2003	Joe P Smith	<div style="width: 100%; height: 10px; background-color: green;"></div>	IN:33	Edit
<input type="checkbox"/> Ability to import data from excel	Enhancement	Assigned	3 - Medium	Joe P Smith	24-Nov-2003	Fred Bloggs	<div style="width: 100%; height: 10px; background-color: green;"></div>	IN:23	Edit
<input type="checkbox"/> Ability to use different color scheme	Enhancement	Resolved	4 - Low	Joe P Smith	24-Nov-2003	Joe P Smith	<div style="width: 100%; height: 10px; background-color: green;"></div>		Save Cancel
<input type="checkbox"/> Ability to generate customized reports	Enhancement	Resolved	1 - Critical	Joe P Smith	24-Nov-2003	Joe P Smith	<div style="width: 100%; height: 10px; background-color: green;"></div>	IN:25	Edit
<input type="checkbox"/> Configurable meta-data columns	Enhancement	Resolved	2 - High	Joe P Smith	24-Nov-2003	Joe P Smith	<div style="width: 100%; height: 10px; background-color: green;"></div>	IN:26	Edit

If you click ***Edit*** on more than one row, the ***Save*** and ***Cancel*** buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one ***Save*** button. Also, if you want to make the same change to multiple rows (e.g. to change five incidents from “Resolved” status to “Closed”), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the ***Edit*** button on the same row as the Filters and it will switch all the selected items into edit mode.

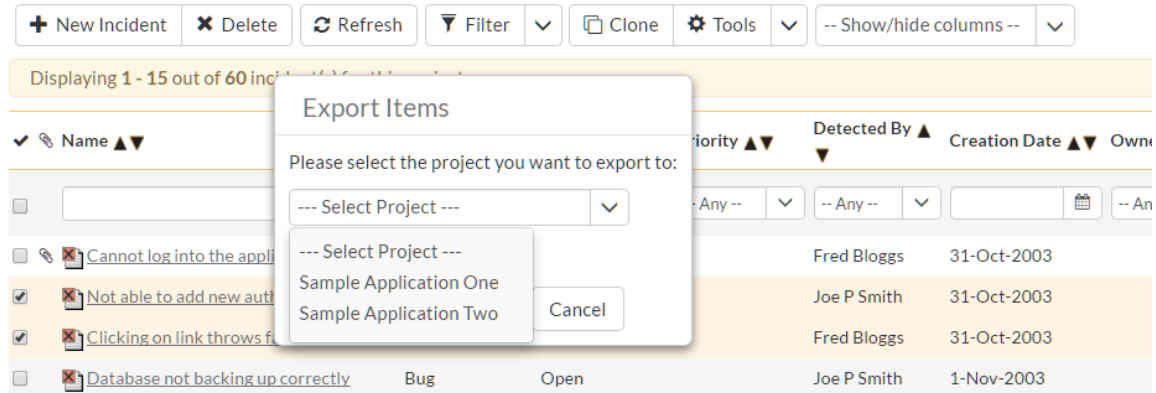
When you have made your updates, you can either click ***Save*** to commit the changes, or ***Cancel*** to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

### 6.1.7. Cloning Incidents

To create a clone of an existing incident or set of incidents, simply select the check-boxes of the incidents you want to copy and then click ***Clone***. This will make a copy of the current incident with its name prefixed ‘Copy of ....’ to distinguish itself from the original. Any file attachments will also be copied along with the incident itself.

### 6.1.8. Exporting Incidents

To export an incident or set of incidents from the current project to another project in the system, select the check-boxes of the incident(s) you want to export and then click the Tools > ***Export to Project***. This will then bring up a list of possible destination projects:



Once you have chosen the destination project and clicked the “**Export**” button, the incidents will be exported from the current project to the destination project. Any file attachments will also be copied to the destination project along with the incidents.

Sometimes you may have a situation where an enhancement has been logged in the incident tracker and now that it has been approved, it needs to be converted into a formal requirement so that test cases and tasks can be generated from it. To aid this process, there is a shortcut that allows you to create new requirement from selected incidents and have it be automatically added to the requirements list. When that is performed an association is automatically added that links this new requirement to the original incident.

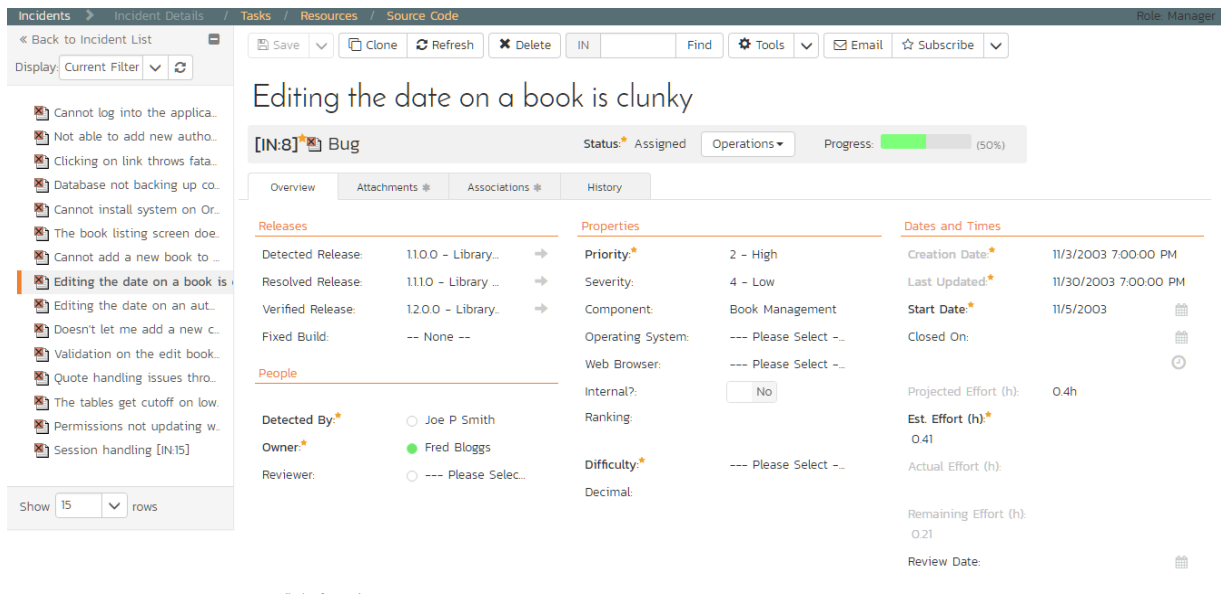
To activate this feature, select the checkboxes of the incidents you want to convert and then click Tools > Convert Into Requirements.

### 6.1.9. Printing Items

To quickly print a single incident or list of incidents you can select the items’ checkboxes and then click Tools > Print Items. This will display a popup window containing a printable version of the selected items. You can also save the report in a variety of common formats from the same Tools menu.

## 6.2. Incident Details

When you click on an incident item in the incident list, or click the “**New Incident**” button (as described in section 6.1), you are taken to the incident details page illustrated below:



This page is made up of three areas:

- the left pane is the navigation window where you can quickly jump to other incidents;
- the upper part of the right pane contains the incident name and key information about it (it's ID number, and what type of incident it is), as well as the current status (see below); and
- the bottom part of the right pane displays different information associated with the incident across a number of tabs.

The navigation pane consists of a link that will take you back to the incidents list, as well as a list of the peer incidents to the one selected. This latter list is useful as a navigation shortcut; you can quickly view the peer incidents by clicking on the navigation links without having to first return to the incidents list page. The navigation list can be switched between four different modes:

- The list of incidents matching the current filter
- The list of all incidents, irrespective of the current filter
- The list of incidents assigned to the current user
- The list of incidents detected/found by the current user

In addition to the left hand navigation, you can enter a specific incident number in the text-box in the toolbar and click the **"Find"** button. In the same toolbar, there is also a shortcut for creating a copy of the current by clicking the **"Clone"** button.

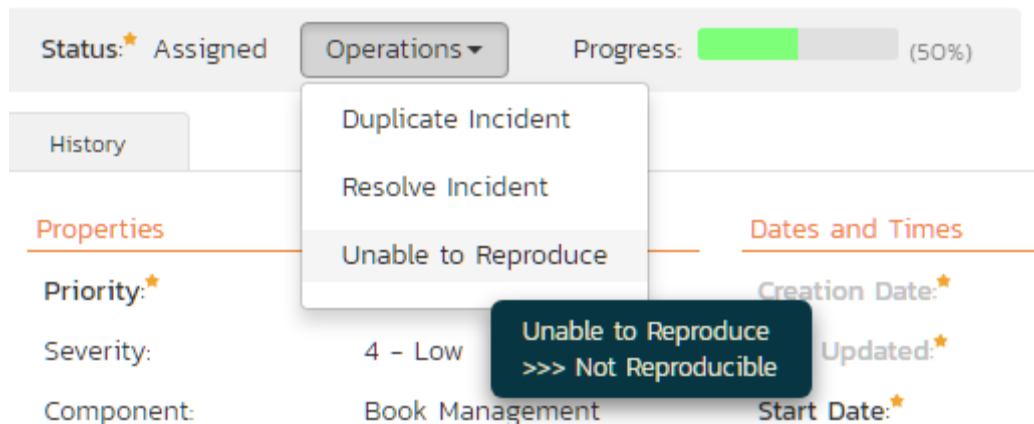
### 6.2.1. Editing an Existing Incident

If you are editing an existing incident, the fields that are available and the fields that are required will depend on your stage in the incident workflow. For example an open incident might not require a "Resolved Version" whereas a resolved incident may well. The types of change allowed and the email



notifications that are sent will depend on how your project administrator has setup the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring the incident workflows to meet their needs.

Depending on the user's role and whether they are listed as the owner or detector of the incident or not, the dropdown next to the incident's current status shows the allowed workflow operations:

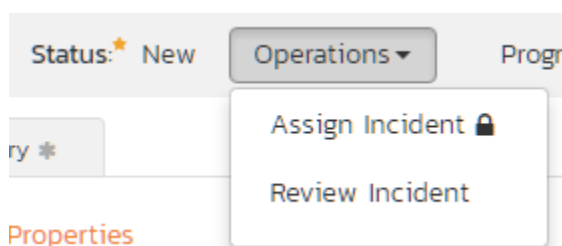


These workflow transitions allow the user to move the incident from one status to another. For example when the incident is in the Assigned status, you will be given the options to:

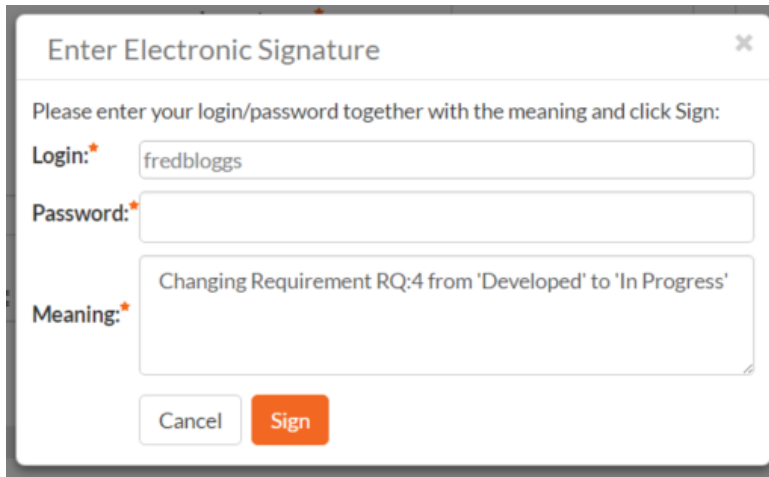
- **Resolve the Incident** – changes status to “Resolved”
- **Unable to Reproduce** – changes the status to “Not Reproducible”
- **Duplicate Incident** - changes the status to “Duplicate”

After changing the status of the incident by clicking on the link, you can then fill in the additional fields that are now enabled and/or required. Once you've made the changes to the appropriate incident fields, you can click “[Save](#)” or one of the options from the “[Save](#)” dropdown list to commit the changes or “[Refresh](#)” to discard the changes and reload the incident from the database.

Please note that if digital signatures have been enabled for a particular workflow operation (and therefore a digital signature is required to confirm the status change. Workflow operations requiring a digital signature are marked with a padlock icon as in the example below:



On attempting to save changes made after clicking a workflow operation that requires a digital signature you will be presented with a popup similar to the one below (which is for a requirement):



Enter Electronic Signature

Please enter your login/password together with the meaning and click Sign:

Login:\* fredbloggs

Password:\*

Meaning:\* Changing Requirement RQ:4 from 'Developed' to 'In Progress'

Cancel Sign

You can print the current incident by clicking Tools > Print, which will display a printable version of the page in a separate window. Alternatively, you can export the incident to a number of formats by selecting the appropriate option from the Tools menu.

### 6.2.2. Inserting a New Incident

If you are creating a new incident, the fields that are available and the fields that are required will depend on how your project has been configured. For example, some projects may require that all incidents be started with Status=New and Type=Incident, others may allow you to specify the incident type. The types of change allowed will depend on how your project administrator has setup the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring the incident workflows to meet their needs.

Once you've filled out the appropriate incident fields, you can either click "[Save](#)" or one of the options from the "[Save](#)" dropdown list to commit the changes or click on "[Back to Incident List](#)" to discard the insertion and return back to the incident list.

### 6.2.3. Overview - Comments

The Comments section allows users to add and view discussions related to the incident:



## 6.2.5. Attachments

In this tab, the lower section of the screen displays the list of documents, screenshots or web links (URLs) that have been “attached” to the incident. The documents can be in any format, though SpiraTeam® will only display the icon for certain known types.

The screenshot shows the 'Attachments' tab interface. At the top, there are tabs for 'Overview', 'Attachments \*', 'Associations \*', and 'History'. Below the tabs are buttons for '+ Add New', 'Add Existing', 'Remove', 'Refresh', and a dropdown for 'Show/hide columns'. A 'Filter' dropdown is also present. The main area displays 'Displaying 1 - 1 out of 1 attachment(s)'. Below this is a table with columns: 'Filename', 'Type', 'Size', 'Edited By', 'Edited On', 'Author', 'ID', and 'Edit'. The table contains one row with the following data: 'Date Editing\_Screenshot.jpg', 'Screen Shot', '281 KB', 'Joe P Smith', '23-Apr-2006', 'Joe P Smith', 'DC:9', and an 'Edit' button. At the bottom, there is a 'Show 15 rows per page' dropdown and a pagination control showing 'Displaying page 1 of 1'.

Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
<a href="#">Date Editing_Screenshot.jpg</a>	Screen Shot	281 KB	Joe P Smith	23-Apr-2006	Joe P Smith	DC:9	Edit

The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To delete an existing attachment from an incident, click the “**Remove**” button and the attachment will be removed from the list.

To attach a new document to the incident, you need to first click the “**Add New**” link to display the new attachment dialog box:

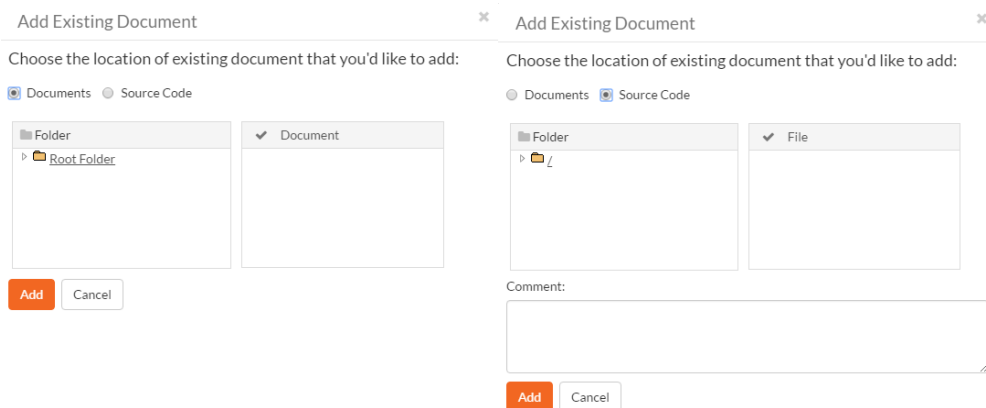
The image shows three instances of the 'Add New Document' dialog box. The first dialog is for 'File' type, with fields for 'Filename' (with a 'Choose File' button), 'Description', 'Document Type' (dropdown), 'Document Folder' (dropdown), and 'Tags'. The second dialog is for 'URL' type, with fields for 'URL', 'Description', 'Document Type' (dropdown), 'Document Folder' (dropdown), and 'Tags'. The third dialog is for 'Screenshot' type, with a 'Screenshot' field (with a note to use CTRL+V), 'Description', 'Document Type' (dropdown), 'Document Folder' (dropdown), and 'Tags'. Each dialog has 'Upload' and 'Cancel' buttons.

There are three different types of item that can be attached to an incident:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the “**Upload**” button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the “**Upload**” button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “**Upload**” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the incident. To do that, click on the “**Add Existing**” button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

## 6.2.6. History

This tab displays the list of changes that have been performed on the incident artifact since its creation. An example incident change history is depicted below:

Overview Attachments \* Associations \* History \*

Refresh Filter Admin View

Displaying 1 - 2 out of 2 change(s).

Change ID	Change Date	Field Name	Old Value	New Value	Changed By	Change Type
7	5-Mar-2005	Type	Incident	Bug	Fred Bloggs	Modified
5	4-Mar-2005	Status	New	Open	Fred Bloggs	Modified

Show 15 rows per page

Displaying page 1 of 1

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system.

## 6.2.7. Associations

This tab displays a list of any requirements, tasks, test runs, test steps or other incidents that are associated with this incident:

Overview Attachments Associations \* History \*

+ Add - Remove Refresh Filter

Displaying 1 - 4 out of 4 association(s).

Type	Artifact Type	Artifact Name	Status	Creation Date	Creator	Comment	Project Name	ID	Edit
Related-to	Requirement	<a href="#">Ability to associate books with different authors</a>	Developed	17-Mar-2004	Joe P Smith		Library Information System	[RQ:8]	Edit
Related-to	Incident	<a href="#">Cannot add a new book to the system</a>	Assigned	16-Mar-2004	Joe P Smith		Library Information System	[IN:7]	Edit
Related-to	Incident	<a href="#">Cannot log into the application</a>	New	15-Mar-2004	Joe P Smith	This incident and bug are related	Library Information System	[IN:1]	Edit
Related-to	Requirement	<a href="#">Ability to edit existing books in the system</a>	Developed	14-Mar-2004	Fred Bloggs		Library Information System	[RQ:5]	Edit

Show 15 rows per page

Displaying page 1 of 1

+ Create a new requirement from this incident

The incidents and tasks in this list are ones that a user has decided are relevant to the current one and has created a direct link between them. In the case of requirements and test cases, the association can be either due to the creator of an incident directly linking the incident to the requirement or test step, or it can be the result of a tester executing a test-run and creating an incident during the test run. In this latter case, the check-box to the left of the association will be unavailable as the link is not editable.

Each association is displayed with the type of association (related-to, vs. a dependency), name of the artifact being linked-to, type of artifact (requirement, incident, etc.), the name of the person who created the association, a comment that describes why the association was made, and the project of the linked artifact. In the case of an indirect association due to a test run, the comment will contain the name of the test run.

You can perform the following actions on an association from this screen:

- **Delete** – removes the selected association to the other artifact. This will only delete the association, not the linked artifact itself.
- **Refresh** – updates the list of associations from the server, useful if other people are adding associations to this incident at the same time.
- **Filter / Apply Filter** – Applies the entries in the filter boxes to the list of associations
- **Clear Filter** – Clears the current filter, so that all associations for the current incident are shown.
- **Edit** – Clicking the “*Edit*” button to the right of the associations allows you to edit the association type and comment fields inline directly on this screen.

To create a new association, click the “**Add**” button to display the “Add New Association” panel:

Overview Attachments Associations \* History \*

Select Artifact Type Filter by name, or search by ID (e.g. undefined4) Search

Save Cancel

+ Add x Remove Refresh Filter

Displaying 1 - 4 out of 4 association(s).

Once you have selected the appropriate artifact type, you will then be able to browse or search for the specific artifact you want to link to. You can also enter the ID of the artifact directly (if known). In either case you can also add a comment that explains the rationale for the association. If you’re adding an association to a test step, the test steps are grouped in their test cases. You can browse the list of test cases within each test case folder.

ID	Name	Project
TC:20	Create Author	Library Information System
TS:42	Step 1: Click on the 'Create new author' link- 	Library Information System
TS:43	Step 2: Enter in the new author information- 	Library Information System
TS:44	Step 3: Click the 'Insert' button- 	Library Information System
TC:21	Create Book	Library Information System
TC:17	Login to Application	Library Information System
TC:16	Open Up Web Browser	Library Information System

### 6.2.8. Creating a Requirement from an Incident

Sometimes you may have a situation where an enhancement has been logged in the incident tracker and now that it has been approved, it needs to be converted into a formal requirement so that test cases and tasks can be generated from it. To aid this process, there is a button on the Associations tab that allows you to create a new requirement from the current incident and have it be automatically added to the requirements list. When that is performed an association is automatically added that links this new requirement to the original incident.

### 6.2.9. Emailing the Incident

Using the **"Email"** button on the toolbar, you can send an email containing details of the incident to an email address or another user on the system:

**Email this artifact to** ✕

**Project User:**  Select a user in the project to send to.

**Email Addresses:**   
A list of email addresses, separated by ;

**Message Subject:**   
Leave blank for default.

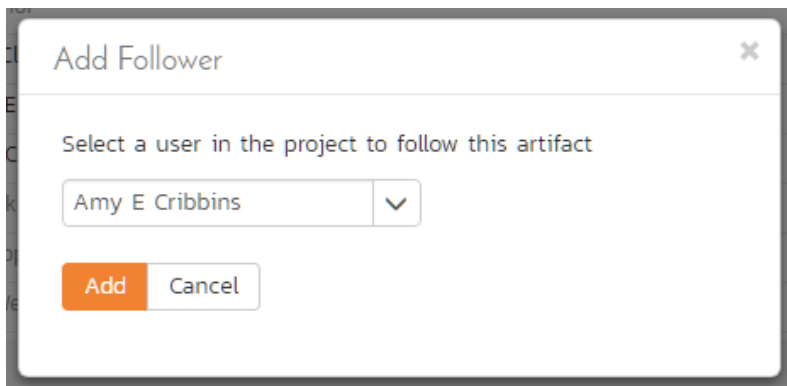
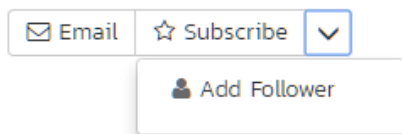


You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user. The content of the email is specified in the System Administration – Notification Templates.

To be notified of any changes made to the current artifact via email, click the “[Subscribe](#)” button. If you already subscribed, the button will instead let you “[Unsubscribe](#)” to stop receiving emails about that particular artifact.

### 6.2.10. Incident Followers

Using the “[Subscribe](#)” button on the toolbar, you can quickly follow the incident, and receive updates on certain changes to it. Depending on your role, you may also see a dropdown to this button, which let’s you add another project member as a follower to this incident.



You can also quickly see who is following an incident under the “People” section in the Overview tab.

Overview Attachments Associations \* His

---


**Releases**

Detected Release:	10.2.0 - Library S...	→
Resolved Release:	11.0.0 - Library S...	→
Fixed Build:	-- None --	

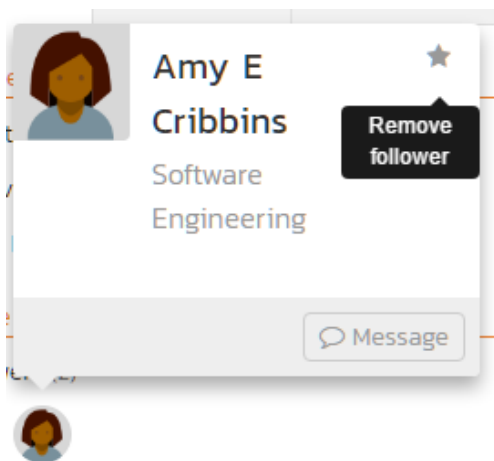
---

**People**

Followers (2)



To view information about the follower, or to unfollow them from the incident, hover over their avatar to display a user profile card.



A user profile card for Amy E Cribbins, Software Engineering. The card includes a star icon, a 'Remove follower' button, and a 'Message' button. Below the card is a smaller version of the user's avatar.

### 6.3. Incident Board

The incident board is an alternative to the incident list page (described in section 6.1) designed to let you view the incidents planned for the current project. You can access this feature by clicking on the **Board** icon in the top-right of the Incidents list page. You can switch back to the Incident list page by clicking on the **Table** view.

The incident board has the following different display modes:

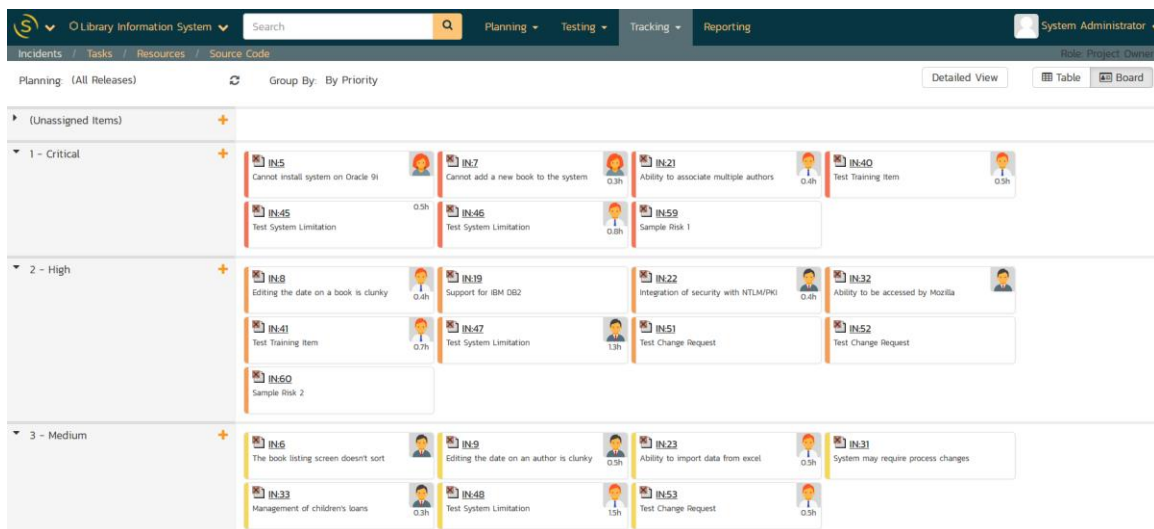
- All Releases
  - By Release
  - By Priority
  - By Status
  - By Person

- Release
  - By Iteration
  - By Priority
  - By Status
  - By Person
- Iteration
  - By Priority
  - By Status
  - By Person

Each of these views is described below:

### 6.3.1. Incidents – By Priority

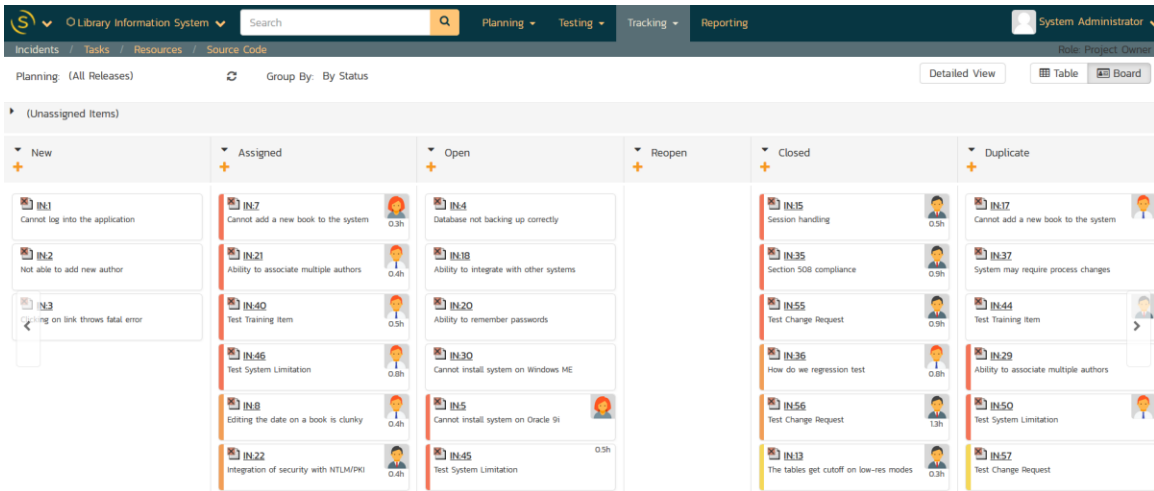
This view is designed to let you see the list of planned incidents organized by priority. Each of the possible priority values is displayed on the left-hand side and the incidents displayed in the same row on the right:



The top section will contain the list of incidents that are not assigned a priority, with the other sections containing the incidents that have been assigned to the specific priority.

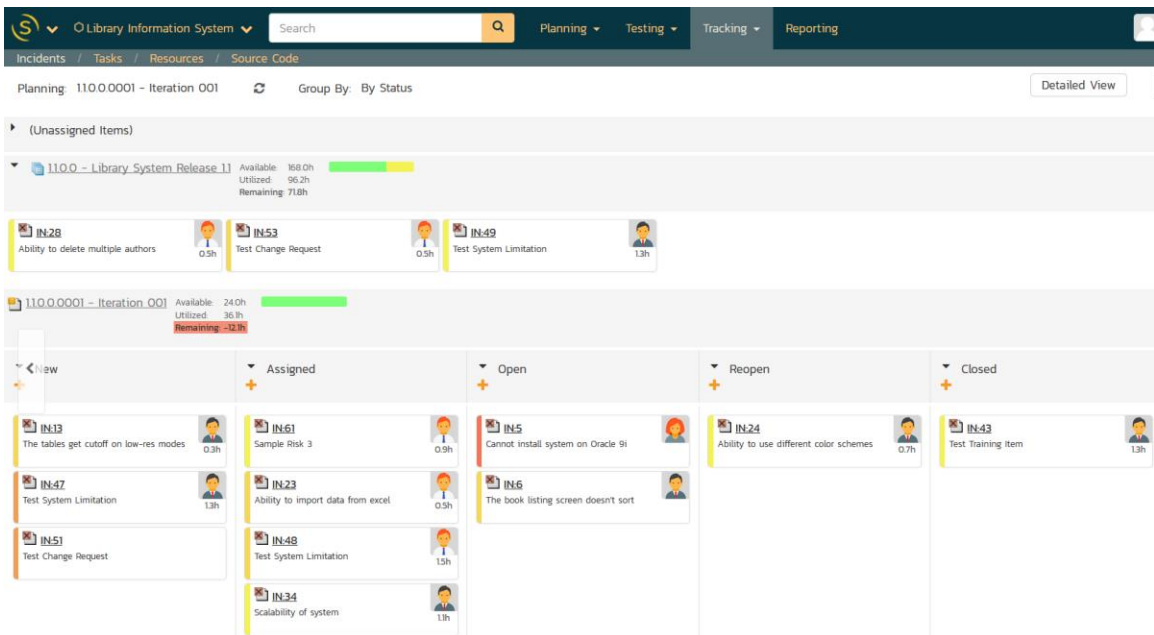
### 6.3.2. Incidents – By Status

This view is designed to let you see the incidents in the current project / release / iteration organized by their status. Each incident status (not started, in progress, completed, blocked, deferred) is displayed as a heading, with the incidents displayed in the same column underneath:



You can click on the expand/collapse icons to hide any resources that are not relevant.

Depending on the view (all releases, release, or iteration), there may be sections with the release and iteration name. You can drag and drop the incidents between statuses or to/from the release/iteration backlog. Any incidents not assigned to a release/iteration will be listed in the (Unassigned Items) section at the top.



### 6.3.4. Incidents - By Person

This view is designed to let you see the incidents in the current project / release / iteration organized by resource / person. Each of the users that is a member of the current project is displayed as a heading, with the incidents displayed in the same column underneath:

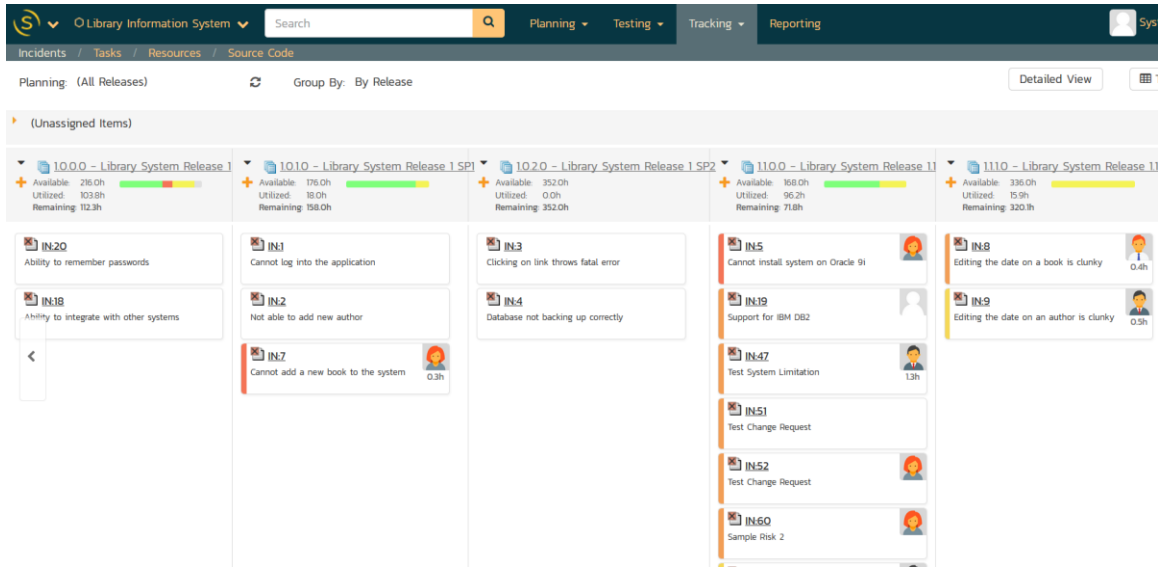
The screenshot displays the Jira incident board interface. At the top, there is a navigation bar with tabs for 'Incidents', 'Tasks', 'Resources', and 'Source Code'. Below this, the current view is 'Planning' for '11.0.0.0001 - Iteration 001', with a 'Group By: By Person' filter and a 'Detailed View' button. The main area shows a hierarchy of items: '(Unassigned Items)', '11.0.0 - Library System Release 11', and '11.0.0.0001 - Iteration 001'. Each item has a progress bar indicating available, utilized, and remaining hours. Below the hierarchy, resources are listed: 'System Administrator', 'Fred Bloggs', 'Donna Harkness', and 'Joe Smith'. Each resource has their own progress bar and a list of assigned incidents (IN-19, IN-23, IN-48, IN-61, IN-60, IN-52, IN-47, IN-13, IN-24) with their respective descriptions and durations.

You can click on the expand/collapse icons to hide any resources that are not relevant. The system will display a progress bar for each resource to illustrate the allocation for that resource. Any resource that has a progress bar that is completely green has been fully scheduled and should not have any additional incidents assigned. If the progress bar for that resource turns red, it means that they have been over-scheduled and you need to reassign some of the incidents.

Depending on the view (all releases, release, or iteration), there may be sections with the release and iteration name; they contain incidents that are scheduled for the current release or iteration but have not yet been assigned to a resource. You can drag and drop the incidents between resources or to/from the release/iteration backlog. Any incidents not assigned to a resource and release/iteration will be listed in the (Unassigned Items) section at the top.

### 6.3.4. Incidents - By Release

This view is only available when you are displaying the incident board for 'all releases'. Each of the active releases defined for the current project is displayed as a heading, with the incidents displayed in the same column underneath



You can drag and drop the incidents between the different releases. Once the incident has been added to the release, the utilized effort for the release will increase, and the available effort will decrease by the same amount.

Note: The system will allow you to assign more incidents to a release than it is possible to complete, however this will result in a negative value for 'available effort'. If this happens, the "Available Effort" value will be displayed in red, and you need to rebalance the items, extend the release length or add project personnel resources to the release.

Clicking on the release hyperlinks in the headers will switch the incident board into the release view.

### 6.3.4. Incidents - By Iteration

This view is only available when you are displaying the incident board for a specific release. Each of the iterations defined for the current release is displayed as a heading, with the incidents displayed in the same column underneath. This view is commonly used in **Scrum** projects:

The screenshot displays the Jira interface for managing incidents. At the top, there's a navigation bar with 'Incidents', 'Tasks', 'Resources', and 'Source Code'. Below this, the current view is 'Planning' for '110.0 - Library System Release 11', grouped by 'By Iteration'. A summary bar shows 'Available: 168.0h', 'Utilized: 96.2h', and 'Remaining: 71.8h'. Below this, three iterations are listed:

- Iteration 001:** Available: 24.0h, Utilized: 32.0h, Remaining: -8.0h (displayed in red). Incidents include IN-5 (Cannot install system on Oracle 9i), IN-51 (Test Change Request), IN-52 (Test Change Request), IN-13 (The tables get cutoff on low-res modes), IN-48 (Test System Limitation), and IN-61 (Sample Risk 3).
- Iteration 002:** Available: 72.0h, Utilized: 29.5h, Remaining: 42.5h. Incidents include IN-47 (Test System Limitation), IN-60 (Sample Risk 2), IN-23 (Ability to import data from excel), and IN-34 (Scalability of system).
- Iteration 003:** Available: 72.0h, Utilized: 15.7h, Remaining: 56.4h. Incidents include IN-19 (Support for IBM DB2), IN-6 (The book listing screen doesn't sort), and IN-24 (Ability to use different color schemes).

You can drag and drop the incidents between the different iterations. Once the incident has been added to the iteration, the utilized effort for the iteration will increase, and the available effort will decrease by the same amount.

Note: The system will allow you to assign more incidents to an iteration than it is possible to complete, however this will result in a negative value for 'available effort'. If this happens, the "Available Effort" value will be displayed in red, and you need to rebalance the items, extend the iteration length or add project personnel resources to the iteration.

Clicking on the iteration hyperlinks in the headers will switch the incident board into the iteration view.

## 7. Release Management

This section outlines how to use the Release Management features of SpiraTeam® to manage different versions of the system being tested in a particular project. This is an optional feature of the system, and you can manage the testing for a project successfully without tracking individual releases. Typically when you develop a system, it is important to ensure that features introduced in successive versions do not impair existing functionality - this is known as *regression testing*.

In such situations, you will want to be able to execute the same set of test scripts against multiple versions of the system and be able to track failures by version. A feature that works correctly in version 1.0 may fail in version 1.1, and the maintenance team may be testing the existing lifecycle of v1.0 in parallel with the development team testing v1.1. Therefore by developing a master set of releases/versions in the Release Management module, you can have the different testing teams correctly assign their testing actions to the appropriate version.

There are two types of release artifact in SpiraTeam® - major project releases that are displayed with the blue release icon and represent major versions of the system, and release iterations (aka builds) that are displayed with a yellow icon and represent intermediate builds/iterations of the system. *Note: Iterations can be contained within a Release, but not the other way round.*

The main differences between releases and iterations are as follows:

- Releases are independent versions of the system being tested and as such, you can map a requirement directly to a release, indicating the release of the system that the requirement will be fulfilled in.
- When you report on a release (e.g. on the project home or in one of the reports) any child iterations are automatically taken into account, and test runs and incidents that are related to the child builds/iterations will get included in the release reports. Child releases on the other hand are not aggregated up into the parent release.

### 7.1. Release List

When you click on the Planning > Releases global navigation link, you will initially be taken to the release list screen illustrated below:



Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit
Library System Release 1	10.0.0			29-Feb-2004	11-Mar-2004	216.0h	94.3h	Major Release	Completed	RL.1	Edit
Library System Release 1 SP1	10.1.0		No Tasks	12-Mar-2004	29-Mar-2004	176.0h	0.3h	Minor Release	Completed	RL.2	Edit
Iteration_001	10.1.0.0001	No Tests	No Tasks	12-Mar-2004	19-Mar-2004	80.0h		Iteration	Completed	RL.11	Edit
Iteration_002	10.1.0.0002	No Tests	No Tasks	20-Mar-2004	23-Mar-2004	48.0h		Iteration	Completed	RL.12	Edit
Iteration_003	10.1.0.0003	No Tests	No Tasks	24-Mar-2004	29-Mar-2004	64.0h		Iteration	Completed	RL.13	Edit
Library System Release 1 SP2	10.2.0		No Tasks	31-Mar-2004	29-Apr-2004	352.0h		Minor Release	Completed	RL.3	Edit
Iteration_001	10.2.0.0001	No Tests	No Tasks	31-Mar-2004	9-Apr-2004	112.0h		Iteration	Completed	RL.14	Edit
Iteration_002	10.2.0.0002	No Tests	No Tasks	10-Apr-2004	19-Apr-2004	112.0h		Iteration	Completed	RL.15	Edit
Iteration_003	10.2.0.0003	No Tests	No Tasks	20-Apr-2004	29-Apr-2004	128.0h		Iteration	Completed	RL.16	Edit
Iteration_001	10.0.0.0001	No Tests		29-Feb-2004	3-Mar-2004	96.0h	32.0h	Iteration	Completed	RL.8	Edit
Iteration_002	10.0.0.0002	No Tests		4-Mar-2004	7-Mar-2004	24.0h	32.0h	Iteration	Completed	RL.9	Edit
Iteration_003	10.0.0.0003	No Tests		8-Mar-2004	11-Mar-2004	72.0h	30.0h	Iteration	Completed	RL.10	Edit
Library System Release 11	11.0.0			14-Oct-2004	26-Oct-2004	168.0h	86.9h	Major Release	In Progress	RL.4	Edit
Library System Release 11 SP1	11.1.0		No Tasks	31-Oct-2004	29-Nov-2004	336.0h	0.9h	Minor Release	In Progress	RL.5	Edit
Library System Release 11 SP2	11.2.0	No Tests	No Tasks	30-Nov-2004	30-Dec-2004	320.0h		Minor Release	Cancelled	RL.7	Edit

The release list will contain all the releases and iterations associated with current project. When you create a new project, this list will initially be empty, and you will have to use the **“Insert”** button to start adding releases and iterations to the project. The hierarchical organization of releases in the list is configurable, so you can organize the various releases in the way that makes most sense for a particular project. Typically you have the major releases as the top-level items, with sub-releases, builds and iterations as the lower-level items.

All of the releases in the list have a release-name, together with the assigned version number for that release, the start-date and end-date for the release, the number of estimated project personnel working on that release, the planned effort for the release, the total effort currently scheduled (as tasks), the available effort for new tasking, the release id, the type of each release, its status, and a set of custom properties defined by the project owner.

For those releases that have test cases mapped against them, the execution status of the various test cases associated with the release is displayed in aggregate for each item as a graphical bar diagram. If you position the mouse over the execution status indicator you will see the detailed execution information displayed as a tooltip.

For those releases that have at least one requirement task associated with them, they will display a block graph that illustrates the relative numbers of task that are on-schedule (green), late-starting (yellow), late-finishing (red) or just not-started (grey). These values are weighted by the effort of the task, so that larger, more complex tasks will be change the graph more than the smaller tasks. To determine the exact task progress information, position the mouse pointer over the bar-chart and the number of associated tasks, along with the details of how many are in each status will be displayed as a “tooltip”.

Clicking on a release's hyperlink will take you to the release details page for the item in question (see section 7.2).

### 7.1.1. Filtering

You can easily filter the list of releases as illustrated in the screen-shot below:

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit
Iteration 003	1.0.1.0.0003	No Tests	No Tasks	24-Mar-2004	29-Mar-2004	64.0h		Iteration	Completed	RL:13	Edit
Iteration 001	1.0.2.0.0001	No Tests	No Tasks	31-Mar-2004	9-Apr-2004	112.0h		Iteration	Completed	RL:14	Edit
Iteration 002	1.0.2.0.0002	No Tests	No Tasks	10-Apr-2004	19-Apr-2004	112.0h		Iteration	Completed	RL:15	Edit
Iteration 002	1.0.1.0.0002	No Tests	No Tasks	20-Mar-2004	23-Mar-2004	48.0h		Iteration	Completed	RL:12	Edit
Iteration 001	1.0.1.0.0001	No Tests	No Tasks	12-Mar-2004	19-Mar-2004	80.0h		Iteration	Completed	RL:11	Edit

To filter the list by any of the displayed columns, you either choose an item from the appropriate drop-down list or enter a free-text phrase (depending on the type of field) and click “**Filter**” or press the <ENTER> key. Note that the name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, release numbers). Clicking on Filter > Clear Filters clears all the set filters and displays all the releases for the project.

In addition, if you have a set of filters that you plan on using on a regular basis, you can choose the option Filter > Save Filter to add the current filter to the list of saved filters that appear on your ‘My Page’. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter:

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit
Iteration 003	1.0.1.0.0003	No Tests	No Tasks	24-Mar-2004	29-Mar-2004	64.0h		Iteration	Completed	RL:13	Edit
Iteration 001	1.0.2.0.0001	No Tests	No Tasks	31-Mar-2004	9-Apr-2004	112.0h		Iteration	Completed	RL:14	Edit
Iteration 002	1.0.2.0.0002	No Tests	No Tasks	10-Apr-2004	19-Apr-2004	112.0h		Iteration	Completed	RL:15	Edit
Iteration 002	1.0.1.0.0002	No Tests	No Tasks	20-Mar-2004	23-Mar-2004	48.0h		Iteration	Completed	RL:12	Edit
Iteration 001	1.0.1.0.0001	No Tests	No Tasks	12-Mar-2004	19-Mar-2004	80.0h		Iteration	Completed	RL:11	Edit

### 7.1.2. Insert

The “**Insert**” button has an attached dropdown menu that allows you to choose whether to insert a release or iteration (if you just click “**Insert**” it defaults to inserting a release). In either case, it will insert the new release / iteration *above* the currently selected item – i.e. the one whose check-box has been selected, at the same level in the hierarchy. If you want to insert a release/iteration below a summary

item, you need to insert it first, then indent it with the “**Indent**” button. If you insert a release without first selecting an existing release from the list, the new release will simply be inserted at the end of the list.

Once the new release has been inserted, the item is switched to “Edit” mode so that you can change the default name, active flag, version number and creator.

### 7.1.3. Delete

Clicking on the “**Delete**” button deletes all the releases whose check-boxes have been selected. If any of the releases have child releases/iteration, then the child releases and iterations are also deleted.

### 7.1.4. Indent

Clicking on the “**Indent**” button indents all the releases whose check-boxes have been selected. Note: you cannot indent a release or iteration if it is *below* an iteration, as iterations are not allowed to have child items.

### 7.1.5. Outdent

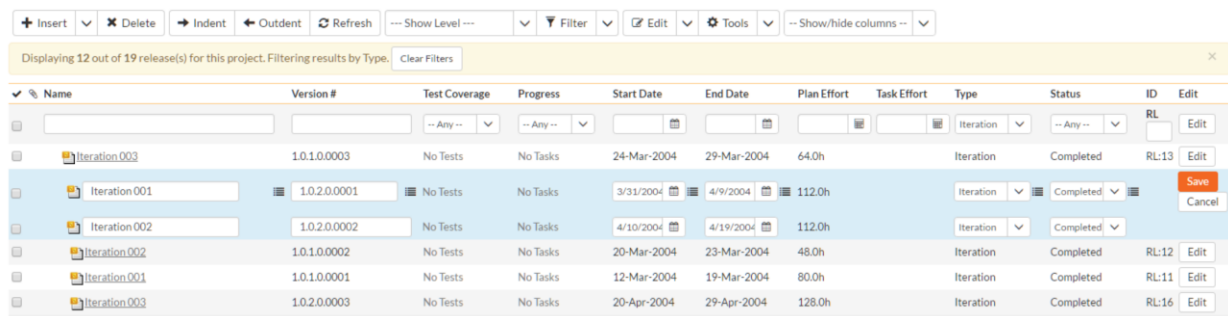
Clicking on the “**Outdent**” button de-indent all the releases whose check-boxes have been selected.

### 7.1.6. Refresh

Clicking on the “**Refresh**” button simply reloads the release list. This is useful as other people may be modifying the list of releases at the same time as you, and after stepping away from the computer for a short-time, you should click this button to make sure you are viewing the most current release list for the project.

### 7.1.7. Edit

Each release/iteration in the list has an “**Edit**” button display in its right-most column. When you click this button or click on any of the cells in the row, you change the item from “View” mode to “Edit” mode. The various columns are made editable, and “**Save**” “**Cancel**” buttons are displayed in the last column:



The screenshot shows a software interface with a toolbar at the top containing buttons for Insert, Delete, Indent, Outdent, Refresh, Show Level, Filter, Edit, Tools, and Show/hide columns. Below the toolbar is a status bar indicating "Displaying 12 out of 19 release(s) for this project. Filtering results by Type." and a "Clear Filters" button. The main area contains a table with the following columns: Name, Version #, Test Coverage, Progress, Start Date, End Date, Plan Effort, Task Effort, Type, Status, ID, and Edit. The table lists several iterations, including Iteration 003, Iteration 001, Iteration 002, and Iteration 002, with their respective version numbers, test coverage, progress, and dates. The "Edit" column for each row contains a button that, when clicked, changes the interface to show "Save" and "Cancel" buttons.

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit
Iteration 003	1.0.1.0.0003	No Tests	No Tasks	24-Mar-2004	29-Mar-2004	64.0h		Iteration	Completed	RL:13	Edit
Iteration 001	1.0.2.0.0001	No Tests	No Tasks	3/31/2004	4/9/2004	112.0h		Iteration	Completed		Save Cancel
Iteration 002	1.0.2.0.0002	No Tests	No Tasks	4/10/2004	4/19/2004	112.0h		Iteration	Completed		
Iteration 002	1.0.1.0.0002	No Tests	No Tasks	20-Mar-2004	23-Mar-2004	48.0h		Iteration	Completed	RL:12	Edit
Iteration 001	1.0.1.0.0001	No Tests	No Tasks	12-Mar-2004	19-Mar-2004	80.0h		Iteration	Completed	RL:11	Edit
Iteration 003	1.0.2.0.0003	No Tests	No Tasks	20-Apr-2004	29-Apr-2004	128.0h		Iteration	Completed	RL:16	Edit

If you click “**Edit**” on more than one row, the “**Save**” and “**Cancel**” buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one “**Save**” button. Also, if you want to make the same change to multiple rows (e.g. to change five releases from “active” to “inactive”), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the “**Edit**” button on the same row as the Filters and it will switch all the selected items into edit mode.

When you have made your updates, you can either click “**Save**” to commit the changes, or “**Cancel**” to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

#### **7.1.8. Show Level**

Choosing an indent level from the ‘Show Level’ drop down box allows you to quickly and easily view the entire release list at a specific indent level. For example you may want to see all releases drilled-down to the *third* level of detail. To do this you would simply choose ‘Level 3’ from the list, and the releases will be expanded / collapsed accordingly.

#### **7.1.9. Show / Hide Columns**

This drop-down list allows you to change the fields that are displayed in the release list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

#### **7.1.10. Copying Releases/Iterations**

To copy a release/iteration or set of releases/iterations, simply select the check-boxes of the release/iteration you want to copy and then select the Edit > Copy Items menu option. This will copy the current release/iteration selection to the clipboard. Then you should select the place where you want the releases/iterations to be inserted and choose the Edit > Paste Items option.

The releases/iterations will now be copied into the destination location you specified. The name of the copied releases/iterations will be prefixed with “Copy of...” to distinguish them from the originals. Note that copied releases/iterations will also include the test mapping information from the originals.

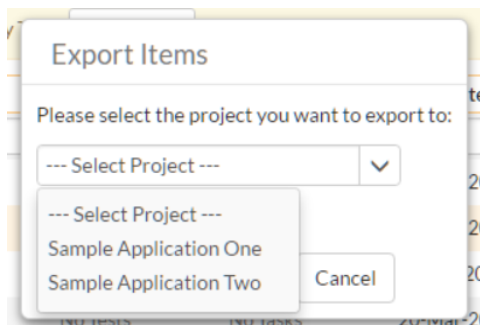
### 7.1.11. Moving Releases/Iterations

To move a release/iteration in the hierarchy, there are two options:

1. Click on the release/iteration you want to move and drag the icon to the location you want it moved. An empty space will appear to show you where it will be inserted. Once you have the requirement positioned at the correct place that you want it inserted, just release the mouse button. To move multiple items simply select their checkboxes and then drag-and-drop one of the selected items
2. Alternatively you can simply select the check-boxes of the release/iteration you want to move and then select the Edit > Cut Items menu option. This will cut the current release/iteration selection to the clipboard. Then you should select the place where you want the release/iteration to be inserted and choose the Edit > Paste Items option. The release/iteration will now be moved into the destination location you specified.

### 7.1.12. Exporting Releases/Iterations

To export releases/iterations from the current project to another project in the system, select the check-boxes of the releases/iterations you want to export and then click the Tools > Export to Project item. This will then bring up a list of possible destination projects:



Once you have chosen the destination project and clicked the “**Export**” button, the releases/iterations will be exported from the current project to the destination project. Any file attachments will also be copied to the destination project along with the release/iteration.

### 7.1.13. Creating Test Sets from Releases

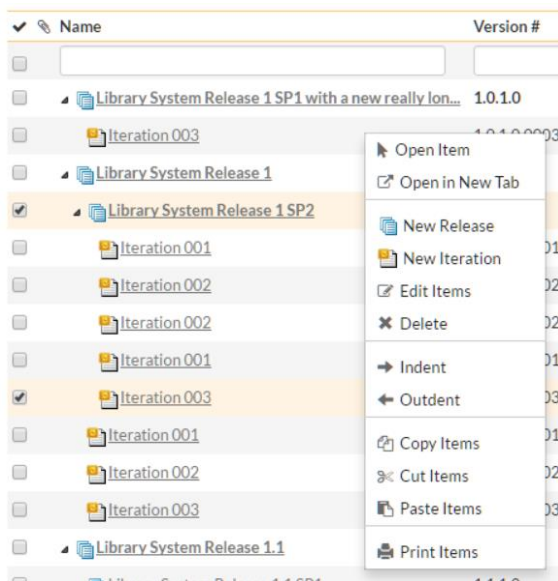
As a shortcut you can click the Tools > Create Test Set option to create a new test set for each of selected releases. The created test sets will include all of the test cases associated with a release. This is useful in regression testing when you have created a new release and want to be able to quickly assign a tester to ensure that all the functionality in the release works as expected.

#### 7.1.14. Printing or Saving Items

To quickly print a single release/iteration or list of releases/iterations you can select the items' checkboxes and then click Tools > Print Items. This will display a popup window containing a printable version of the selected items. You can also save the report in a variety of common formats from the same Tools menu.

#### 7.1.15. Right-Click Context Menu

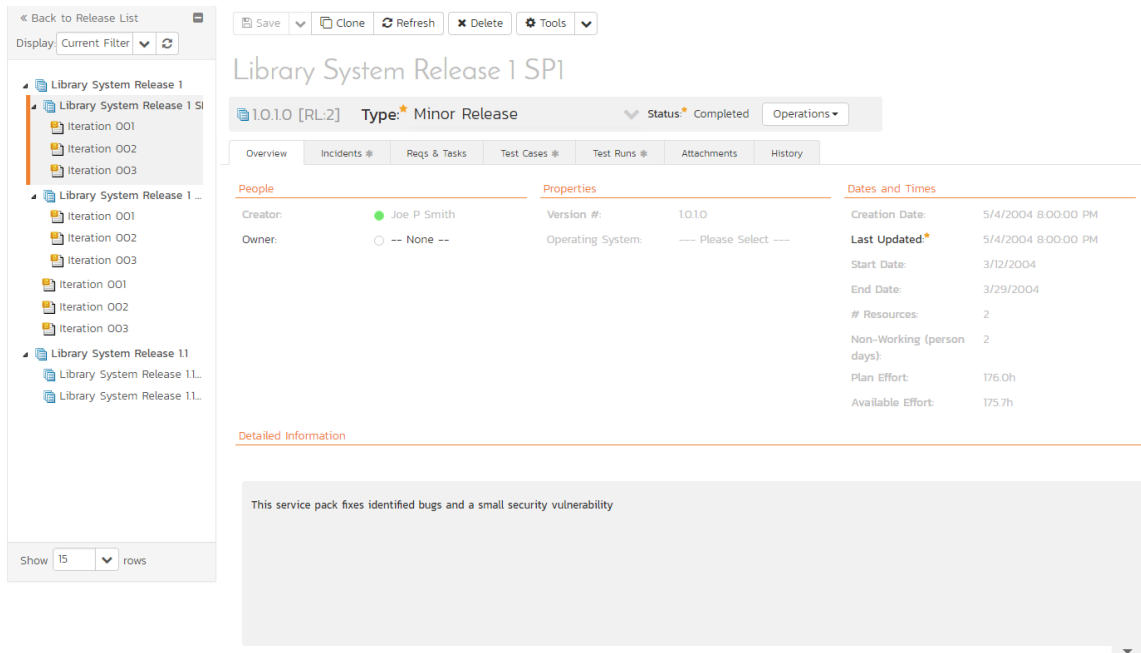
SpiraTeam® provides a shortcut – called the *context menu* - for accessing some of the most commonly used functions, so that you don't need to move your mouse up to the toolbar each time. To access the context menu, right-click on any of the rows in the release list and the following menu will be displayed:



You can now choose any of these options as an alternative to using the icons in the toolbar

#### 7.2. Release Details

When you click on release item in the release list described in section 7.1, you are taken to the release details page illustrated below:



This page is made up of *three* areas;

1. the left pane displays the releases list navigation;
2. the right pane's header, which displays: the operations toolbar; the editable name of the selected release; and the info bar (with a shaded background), which also contains the workflow status transitions (see below); and
3. the right pane's tabbed interface with rich information related to the release.

Please note that on smaller screen sizes the navigation pane is not displayed. While the navigation pane has a link to take you back to the releases list, on mobile devices a 'back' button is shown on the left of the operations toolbar.

The navigation pane can be collapsed by clicking on the "-" button, or expanded by clicking anywhere on the gray title area. On desktops the user can also control the exact width of the navigation pane by dragging and dropping a red handle that appears on hovering at the rightmost edge of the navigation pane.

The navigation pane consists of a link that will take you back to the release list, as well as a list of the other releases in the current project. This latter list is useful as a navigation shortcut; you can quickly view the test run information of all the other releases by clicking on the navigation links without having to first return to the release list page. The navigation list can be switched between two different modes:

- The list of releases matching the current filter
- The list of all releases, irrespective of the current filter

If you are editing an existing item, the fields that are available and the fields that are required will depend on your stage in its workflow. The types of change allowed and the email notifications that are sent will depend on how your project administrator has setup the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring workflows to meet their needs.

Depending on the user's role and whether they are listed as the owner or author of the requirement, displayed in the info bar beneath the requirement name is the current workflow status and an "operations" button which, when clicked, will show a set of allowed workflow operations.

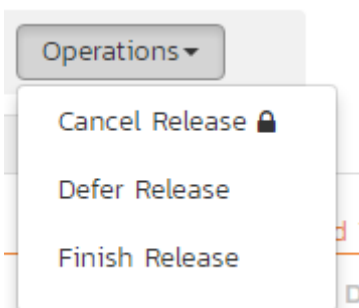


Releases can have the following statuses: planned, in progress, completed, closed, deferred, and cancelled. Note that releases marked as closed, deferred, or cancelled cannot be associated with other artifacts – for example an incident's resolved release cannot be a cancelled release.

Workflow transitions allow the user to move the item from one status to another. For example when the release is in the In Progress status, you will be given the options to:

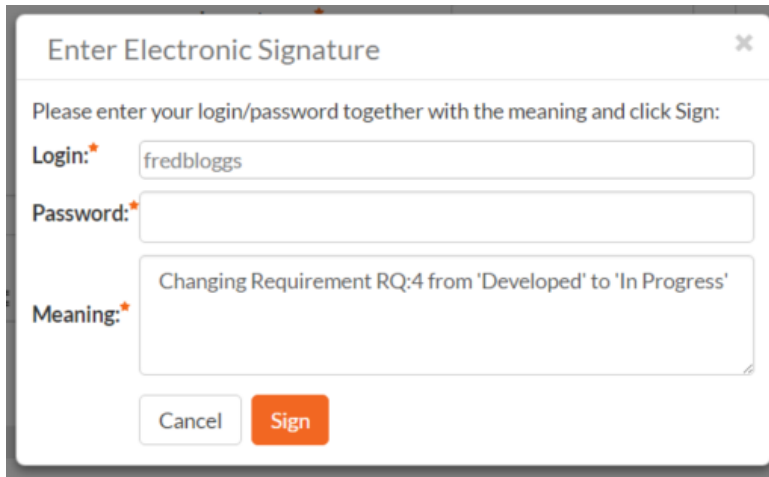
- **Cancel Release** – changes status to "Cancelled"
- **Defer Release** – changes the status to "Deferred"
- **Finish Release** - changes the status to "Completed"

Please note that if digital signatures have been enabled for a particular workflow operation (and therefore a digital signature is required to confirm the status change. Workflow operations requiring a digital signature are marked with a padlock icon as in the example below:





On attempting to save changes made after clicking a workflow operation that requires a digital signature you will be presented with a popup similar to the one below (which is for a requirement):



Enter Electronic Signature

Please enter your login/password together with the meaning and click Sign:

Login:\* fredbloggs

Password:\*

Meaning:\* Changing Requirement RQ:4 from 'Developed' to 'In Progress'

Cancel Sign

The top part of the right pane allows you to view and/or edit the details of the particular release. In addition you can delete the current artifact by choosing “[Delete](#)”, discard any changes made by clicking “[Refresh](#)”, or print or export it by clicking one of the options from the Tools dropdown menu. The lower part of the right pane can be in one of eight possible modes that can be selected: “Overview”, “Incidents”, “Reqs & Tasks”, “Test Cases”, “Test Runs”, “Attachments”, and “History”. Each of the different views is described separately below.

Using the “[Email](#)” button on the toolbar, you can send an email containing details of the release to an email address or another user on the system:

Email this artifact to

Project User:  
Amy E Cribbins  
Select a user in the project to send to.

Email Addresses:  
A list of email addresses, separated by ;

Message Subject:  
Leave blank for default

Send Cancel

You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user. The content of the email is specified in the System Administration – Notification Templates.

To be notified of any changes made to the current artifact via email, click the “[Subscribe](#)” button. If you already subscribed, the button will instead let you “[Unsubscribe](#)” to stop receiving emails about that particular artifact. Depending on your role, you may also see a dropdown arrow to the right of this button. This will let you subscribe others in the project to this artifact.

The bottom part of the right pane can be switched between six views: “Overview”, “Incidents”, “Requirements and Tasks”, “Test Cases”, “Test Runs”, “Attachments”, and “History”, each of which will be described in more detail below.

### 7.2.1. Overview – Details

The Overview tab is divided into a number of different sections. Each of these can be collapsed or expanded by clicking on the title of that section. It displays the description, fields and comments associated with the requirement.

The top part of this tab displays the various standard fields and custom properties associated with the requirement. Fields (both standard and custom) are grouped under the collapsible headings (marked by orange text and underline) in the screenshot below. For instance, all fields regarding dates are grouped together in the “Dates and Times” area.

Overview	Incidents *	Reqs & Tasks	Test Cases *	Test Runs *	Attachments	History *
<b>People</b>		<b>Properties</b>		<b>Dates and Times</b>		
Creator:*	<span style="color: green;">●</span> Joe P Smith	Version #:*	1.0.1.0	Creation Date:	5/4/2004 8:00:00 PM	
Owner:	<span style="color: gray;">○</span> -- None --	Operating System:	--- Please Select ---	Last Updated:*	10/10/2017 12:27:02 PM	
				Start Date:*	3/12/2004	
				End Date:*	3/29/2004	
				# Resources:*	2	
				Non-Working (person days):*	2	
				Plan Effort:	176.0h	
				Available Effort:	175.7h	

---

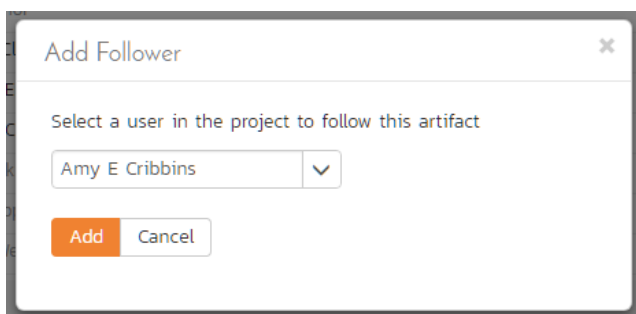
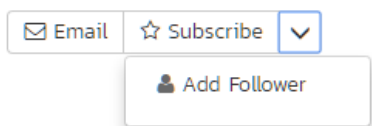
**Detailed Information**

This service pack fixes identified bugs and a small security vulnerability

When you make changes to the release/iteration’s start-date, end-date, number of project personnel resources, or number of non-working *person* days, the system will automatically calculate how many hours of effort (planned effort) are available in the release/iteration for assigning tasks. As you begin assigning tasks – either through the Tasks tab or the Iteration Planning screen – the total estimated effort of the tasks is subtracted from this planned effort to give the “available effort”.

### 7.2.1.1. Followers

Using the “**Subscribe**” button on the toolbar, you can quickly follow the item, and receive updates on certain changes to it. Depending on your role, you may also see a dropdown to this button, which let’s you add another project member as a follower to this item.



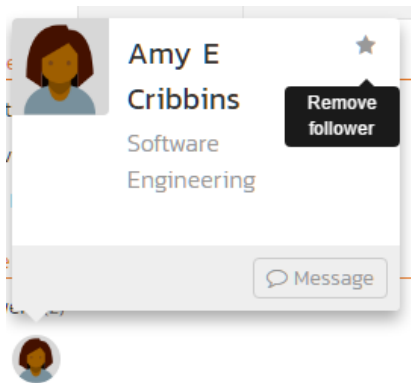
You can also quickly see who is following an incident under the “People” section in the Overview tab.

### People

Followers (2)



To view information about the follower, or to unfollow them from the item, hover over their avatar to display a user profile card.



#### 7.2.1.2. Overview – Detailed Information

The Detailed Information section contains the long, formatted description of the requirement, as well as any rich text custom fields. You can enter rich text or paste in from a word processing program or web page into these fields. Clicking on the shaded areas of one of these detailed fields will display the rich text toolbar.

#### 7.2.2. Overview - Comments

The Comments tab shows the current discussion thread for this release:

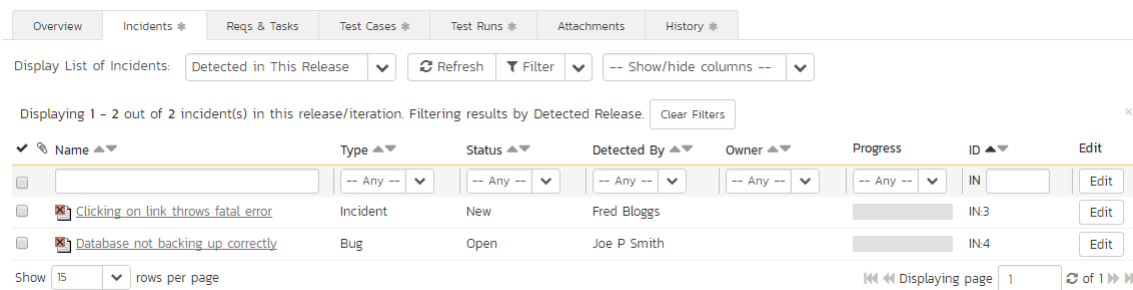


## 7.2.4. Incidents

This tab displays the incidents associated with the selected release. The incident list can be one of three modes:

- **Detected in this Release** – this will display a list of all the incidents that were detected during the testing of the selected release. This is useful in determining if there are open incidents associated with a release that need to be dealt with.
- **Resolved in this Release** – This will display a list of all the incidents that have been reportedly resolved in this release. This is useful for double-checking that all the resolved incidents for a release have indeed been fixed.
- **Verified in this Release** – This will display a list of the incidents that have been verified as being fixed in this release. This is useful for generating release notes for a specific release indicating what changes and enhancements have been made in the release.

Regardless of the mode, each incident is listed together with the type, status, priority, name, owner, detector, detection date and a link to the actual incident details (see section 6.2):



The screenshot shows the 'Incidents' tab interface. At the top, there are navigation tabs: Overview, Incidents (selected), Reqs & Tasks, Test Cases, Test Runs, Attachments, and History. Below the tabs, there is a 'Display List of Incidents:' section with a dropdown menu set to 'Detected in This Release', a 'Refresh' button, a 'Filter' button, and a 'Show/hide columns' dropdown. Below this, a status bar indicates 'Displaying 1 - 2 out of 2 incident(s) in this release/iteration. Filtering results by Detected Release.' and a 'Clear Filters' button. The main table has the following columns: Name, Type, Status, Detected By, Owner, Progress, ID, and Edit. The table contains two rows of incident data:

Name	Type	Status	Detected By	Owner	Progress	ID	Edit
Clicking on link throws fatal error	Incident	New	Fred Bloggs			IN-3	Edit
Database not backing up correctly	Bug	Open	Joe P Smith			IN-4	Edit

At the bottom of the table, there is a 'Show 15 rows per page' dropdown and a pagination control showing 'Displaying page 1 of 1'.

To change between the three modes outlined above, select the desired mode from the drop-down list contained within the header of the incident list table.

You can perform the following actions:

- **Refresh** – updates the list of incidents from the server, useful if other people are adding incidents to this release at the same time.
- You can **filter** the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.
- **Edit** – Clicking the “**Edit**” button to the right of the incident allows you to edit the incident inline directly on this screen. This functionality is limited to project owners.
- **Show/Hide Columns** – Allows you to choose which incident columns are visible

## 7.2.5. Reqs & Tasks

This tab displays the list of requirements and their associated child tasks that need to be completed for the release/iteration to be completed:

Requirement/Task Name	Importance	Progress	Owner	Est. Effort	Actual Effort	Projected Effort	Edit
Ability to add new books to the system	1 - Critical	100%	Joe P Smith	16.0h	15.5h	0.0h	Edit
Develop new book entry screen	1 - Critical	100%	Fred Bloggs	8.0h	7.3h	7.3h	Edit
Create book object insert method	1 - Critical	100%	Fred Bloggs	5.0h	5.3h	5.3h	Edit
Write book object insert queries	1 - Critical	100%	Fred Bloggs	3.0h	2.8h	2.8h	Edit
Ability to edit existing books in the system	1 - Critical	100%	Joe P Smith	16.0h	16.8h	0.0h	Edit
Ability to delete existing books in the system	1 - Critical	100%	Fred Bloggs	16.0h	15.2h	0.0h	Edit
Ability to create different editions	1 - Critical	75%	Fred Bloggs	16.0h	10.3h	7.5h	Edit
Ability to edit existing authors in the system	2 - High	0%	Fred Bloggs	16.0h	0.0h	16.0h	Edit
Ability to delete existing authors in the system	2 - High	12.5%	Fred Bloggs	14.0h	3.2h	10.8h	Edit

Each of the requirements and associated tasks is displayed together with its name, description (by hovering the mouse over the name), priority, progress indicator, current owner, estimated effort, actual effort, projected effort and numeric task identifier. Clicking on a requirement will bring up the requirement details page (see section 4.2). Clicking the triangle by a requirement will expand/collapse its list of tasks. Clicking on a task name will bring up the Task Details page which is described in more detail in section 8.2. This allows you to edit the details of an existing task.

You can perform the following actions on a task from this screen:

- **Insert Task** – inserts a new task in the task list under the specified requirement, with a default set of values. The task will be associated with the specified requirement and current release/iteration. If no requirement is selected, the task will only be associated with the current release/iteration
- **Delete** – deletes the task from the project.
- **Refresh** – updates the list of requirements and tasks from the server, useful if other people are adding requirements and/or tasks to this release/iteration at the same time.
- You can **filter** the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “**Filter**” button. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.
- **Edit** – Clicking the “**Edit**” button to the right of the requirement or task allows you to edit the item inline directly on this screen. Only columns visible will be editable.

- **Show Level** – Allows you to quickly expand/collapse all the requirements in the list.

## 7.2.6. Test Cases

This tab shows the test coverage information for the release in question:

Displaying 1 - 3 out of 3 association(s).

Type	Name	Status	Execution Status	Last Executed	Priority	Project Name	ID
<input type="checkbox"/>	-- Any --	-- Any --	-- Any --		-- Any --	-- Any --	TC
<input type="checkbox"/> Functional	Ability to create new book	Ready for Test	Passed	1-Dec-2003	1 - Critical	Library Information System	TC2
<input type="checkbox"/> Regression	Book management	Ready for Test	Passed	1-Dec-2003	2 - High	Library Information System	TC8
<input type="checkbox"/> Scenario	Adding new book and author to library	Approved	Not Run		3 - Medium	Library Information System	TC13

Show 15 rows per page      Displaying page 1 of 1

The tab displays a grid containing the test cases already mapped to this release. You can filter that list by the test case type, name, status, execution status, execution date, priority, project name and ID. You can remove an existing test case by selecting its check box and clicking the 'Delete' button. This doesn't delete the test case, just removes it from the release.

Hovering the mouse over the names of the test cases will display a "tooltip" consisting of the test case name, place in the folder structure and a detailed description.

To add a new test case to the release, simply click on the 'Add' button:

Root

~ No matches found: ~

You can search for a test case by its ID if you know it (make sure to include the "TC" prefix):

Root

ID	Name	Project
<input type="checkbox"/> TC:4	Ability to create new author	Library Information System

Otherwise, you can search for the test cases by choosing a folder from the dropdown and/or entering a partial name match:



Root ▾ book

ID	Name	Project
<input type="checkbox"/> TC: 3	Ability to edit existing book	Library Information System
<input type="checkbox"/> TC: 6	Ability to reassign book to different author	Library Information System
<input type="checkbox"/> TC: 19	Adding multiple new books	Library Information System
<input type="checkbox"/> TC: 18	Adding new author and book	Library Information System
<input type="checkbox"/> TC: 21	Create Book	Library Information System
<input type="checkbox"/> TC: 12	Person loses book and needs to report loss	Library Information System

Once you have found the desired test case(s), simply select their check boxes and click the 'Save' button to add them to the current release:

Root ▾ book

ID	Name	Project
<input type="checkbox"/> TC: 3	Ability to edit existing book	Library Information System
<input type="checkbox"/> TC: 6	Ability to reassign book to different author	Library Information System
<input checked="" type="checkbox"/> TC: 19	Adding multiple new books	Library Information System
<input checked="" type="checkbox"/> TC: 18	Adding new author and book	Library Information System
<input type="checkbox"/> TC: 21	Create Book	Library Information System
<input type="checkbox"/> TC: 12	Person loses book and needs to report loss	Library Information System

2 Row(s) selected

Finally, as a shortcut you can click the **["Create Test Set from This Release"](#)** link to create a new test set from this release, that will include all of the test cases associated with this release. This is useful in regression testing when you have created a new release and want to be able to quickly assign a tester to ensure that all the functionality in the release works as expected.

### 7.2.7. Test Runs

This view displays the list of all the test runs executed against the release. Each test run is listed together with the date of execution, the name of the test case, the name of the tester, the release/version of the system that the test was executed against, the name of the test set (if applicable), the overall execution status for the test case in that run and a link to the actual test run details (see section 5.6). In addition, you can choose to display any of the custom properties associated with the test run.

Overview Incidents \* Reqs & Tasks \* Test Cases \* Test Runs \* Attachments History \*

Displaying 1 - 5 out of 5 test run(s). Filtering results by Release.

Name	End Date	Type	Tester	Release	Execution Status	Act. Dur.	ID	Edit
Ability to edit existing book	1-Dec-2003	Manual	Fred Bloggs	1.0.0.0	Caution	0.9h	TR:10	<input type="button" value="Edit"/>
Ability to edit existing book	1-Dec-2003	Manual	Fred Bloggs	1.0.0.0	Passed	15h	TR:3	<input type="button" value="Edit"/>
Ability to create new author	1-Dec-2003	Manual	Joe P Smith	1.0.0.0	Failed	15h	TR:4	<input type="button" value="Edit"/>
Ability to create new book	1-Dec-2003	Automated	Fred Bloggs	1.0.0.0	Failed	1.2h	TR:12	<input type="button" value="Edit"/>
Ability to create new book	1-Dec-2003	Manual	Joe P Smith	1.0.0.0	Failed	1.3h	TR:1	<input type="button" value="Edit"/>

Show 15 rows per page Displaying page 1 of 1

The “Show/hide columns” drop-down list allows you to change the fields that are displayed in the test run list as columns. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. The displayed columns can be any standard field or custom property.

You can also filter the results by choosing items from the filter options displayed in the sub-header row of each field and clicking the “[Filter](#)” link. In addition, you can quickly sort the list by clicking on one of the directional arrow icons displayed in the header row of the appropriate field.

## 7.2.8. Attachments

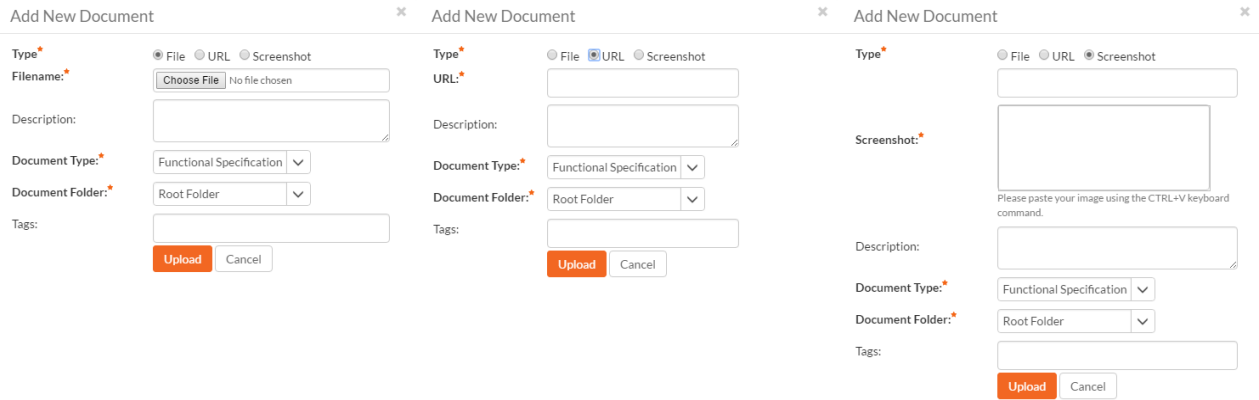
In this mode, the lower section of the screen displays the list of documents that have been “attached” to the release. The documents can be in any format, though SpiraTeam® will only display the icon for certain known types.

Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
<a href="#">CreateNewAuthor.js</a>	Functional Specification	1 KB	Fred Bloggs	9-Sep-2011	Fred Bloggs	DC.20	<a href="#">Edit</a>
<a href="#">CreateNewAuthor.objects.js</a>	Functional Specification	11 KB	Fred Bloggs	9-Sep-2011	Fred Bloggs	DC.21	<a href="#">Edit</a>
<a href="#">CreateNewAuthor.objects.metadata</a>	Functional Specification	87 KB	Fred Bloggs	9-Sep-2011	Fred Bloggs	DC.22	<a href="#">Edit</a>

The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To delete an existing attachment from an incident, click the “[Remove](#)” button and the attachment will be removed from the list.

To attach a new document to the release, you need to first click the “[Add New](#)” link to display the new attachment dialog box:

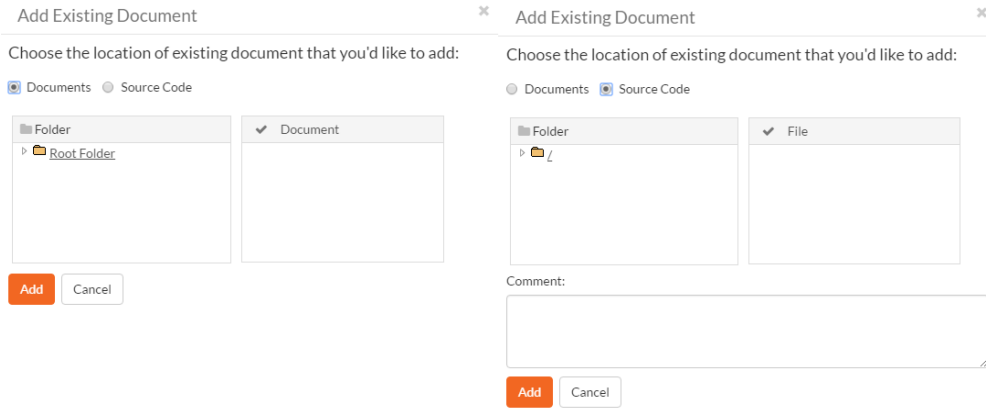


There are three different types of item that can be attached to a release:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the **“Upload”** button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the **“Upload”** button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click **“Upload”** to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn’t put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that’s already stored in SpiraTeam) with the incident. To do that, click on the **“Add Existing”** button to bring up the add file association dialog box:



You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

### 7.2.9. View History

In this mode, the main pane displays the list of changes that have been performed on the release artifact since its creation. An example release change history is depicted below:

Change ID	Change Date	Field Name	Old Value	New Value	Changed By	Change Type
17	10-Oct-2017	Description	This service pack fixes identified bugs and a small security vulnerability	This service pack fixes identified bugs and a small security vulnerability	System Administrator	Modified
17	10-Oct-2017	End Date	3/29/2004 7:00:00 PM	3/29/2004 12:00:00 AM	System Administrator	Modified
17	10-Oct-2017	Status	Completed	In Progress	System Administrator	Modified
17	10-Oct-2017	Start Date	3/12/2004 7:00:00 PM	3/12/2004 12:00:00 AM	System Administrator	Modified

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “Admin View” button to revert any unwanted changes.

### 7.3. Build Details

When you click on a build entry in the build list, you are taken to the build details page illustrated below:

The screenshot shows the SpiraTeam interface for 'Build 0014'. On the left is a navigation pane with a 'Back To Build List' link and a list of builds: Iteration 003, Build 005, Build 004 (highlighted), Build 003, and Build 002. The top right pane shows the build's description, status (Succeeded), creation date (3/10/2004 7:00:00 PM), and last updated date (3/10/2004 7:00:00 PM). Below this are tabs for 'Associations', 'Revisions', 'Incidents', and 'Test Runs'. The bottom right pane displays a table of associations with columns for Artifact Type, Name, Creation Date, Creator, Comment, and ID.

Artifact Type	Name	Creation Date	Creator	Comment	ID
Requirement	Ability to completely erase all books stored in the system with one click	25-Jul-2008	Fred Bloggs	This implements the deletion screen fixes	[RQ:10]
Task	Create book object delete all method	5-May-2005	Fred Bloggs		[TK:19]

This page is made up of three areas; the left pane is the navigation window, the upper part of the right pane contains the build detailed information itself, and the bottom part of the right pane displays different information associated with the build.

The navigation pane consists of a link that will take you back to the build list, as well as a list of the other builds that belong to the same release/iteration as the current one. The top part of the right pane allows you to view the details of the build including a detailed description of why it succeeded or failed. Since builds are populated from an external Continuous Integration server the build information will always be read-only inside the SpiraTeam user interface.

The lower part of the right pane contains tabs that can display different information associated with the build. Each of the tabs – “Associations”, “Incidents”, “Revisions”, and “Test Runs” - is described separately below.

### 7.3.1. Associations

This tab displays a list of SpiraTeam artifacts that have been associated with any of the source code revisions (see section 7.4.3 below) that were included in the current build:

The screenshot shows the 'Associations' tab selected. It features a 'Refresh' button and a 'Filter' dropdown. Below the buttons, it states 'Displaying 1 - 2 out of 2 association(s)'. The table below has columns for Artifact Type, Name, Creation Date, Creator, Comment, and ID.

Artifact Type	Name	Creation Date	Creator	Comment	ID
Requirement	Ability to completely erase all books stored in the system with one click	25-Jul-2008	Fred Bloggs	This implements the deletion screen fixes	[RQ:10]
Task	Create book object delete all method	5-May-2005	Fred Bloggs		[TK:19]

At the bottom, there is a 'Show 15 rows per page' dropdown and a pagination control showing 'Displaying page 1 of 1'.

### 7.3.2. Revisions

This tab displays a list of the source code revisions that were included in the current build. The grid can be sorted and filtered by using the appropriate controls:

Revision	Author	Summary	Commit Date	Content	Properties
rev0015	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	5-Dec-2017	Yes	No

### 7.3.3. Incidents

This tab displays the list of incidents that have been fixed in the current build. The grid can be sorted and filtered by using the appropriate controls:

Name	Type	Status	Detected By	Owner	Progress	ID	Edit
System may require process changes	Issue	Duplicate	Fred Bloggs			IN:37	Edit
User expectations from old client app	Training	Open	Fred Bloggs			IN:38	Edit

### 7.3.4. Test Runs

This tab displays a list of all the tests that have been executed against the current build. The grid can be sorted and filtered by using the appropriate controls:

Name	End Date	Type	Tester	Release	Execution Status	Act. Dur.	ID	Edit
------	----------	------	--------	---------	------------------	-----------	----	------

## 8. Task Tracking

This section outlines how you can use the Task Tracking features of SpiraPlan® and SpiraTeam® to view and manage the discrete activities that each member of the development team would need to carry out for the requirement to be fulfilled. Each task can be assigned to an individual user as well as associated with a particular release or iteration. The system can then be used by the project manager to track the completion of the different tasks to determine if the project is on schedule.

The tasks can be organized into different folders as well as categorized by different types (development, testing, infrastructure, etc.), each of which can have its own *workflow* which defines the process by which the task changes status during the project lifecycle.

### 8.1. Task List

When you click on the Tracking > Tasks global navigation link, you will initially be taken to the tasks list screen illustrated below:

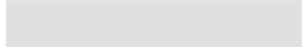




Name	Progress	Type	Status	Priority	Owner	Release	ID	Edit
Develop new book entry screen	Completed	Development	Completed	1 - Critical	Fred Bloggs	10.0.0.0001	TK1	Edit
Develop edit book details screen	Completed	Development	Completed	1 - Critical	Fred Bloggs	10.0.0.0001	TK4	Edit
Refactor book screen to include delete button	Completed	Development	Completed	1 - Critical	Joe P Smith	10.0.0.0002	TK7	Edit
Develop book-subject association screen	Completed	Development	Completed	1 - Critical	Fred Bloggs	11.0.0.0001	TK10	Edit
Refactor book details screen to include author drop-down	Completed	Development	Completed	1 - Critical	Joe P Smith	11.0.0.0001	TK14	Edit
Refactor book details screen to include edition drop-down	Completed	Development	Completed	1 - Critical	Fred Bloggs	11.0.0.0002	TK16	Edit
Add 'delete all' button to book list screen	Completed	Development	Completed	2 - High	Joe P Smith	12.0.0	TK18	Edit
Develop new edition entry screen	In Progress	Development	In Progress	1 - Critical	Fred Bloggs	10.0.0.0003	TK21	Edit
Develop edit author details screen	Not Started	Development	Not Started	2 - High	Joe P Smith	10.0.0.0002	TK24	Edit
Refactor author screen to include delete button	Not Started	Development	Not Started	2 - High	Fred Bloggs	10.0.0.0003	TK27	Edit
Refactor author details page to include contact info	Not Started	Development	Not Started	2 - High			TK30	Edit
Develop author-subject association screen	Completed	Development	Completed	2 - High	Fred Bloggs	11.0.0.0002	TK33	Edit
Develop new subject entry screen	Not Started	Development	Not Started	3 - Medium	Joe P Smith	11.0.0.0003	TK37	Edit
Develop edit subject details screen	Not Started	Development	Not Started	3 - Medium	Fred Bloggs	11.0.0.0003	TK40	Edit

The task list screen displays all the tasks entered for the current project by folder, in a filterable, sortable grid. The grid displays the task number together with fields such as priority, name, assigned owner, start date, end date, scheduled release, etc. The choice of columns displayed is configurable per-user, per-project, giving extensive flexibility when it comes to viewing and searching tasks.

In addition, you can view a more detailed description of the task by positioning the mouse pointer over the task name hyperlink and waiting for the popup “tooltip” to appear. If you click on the task name hyperlink, you will be taken to the task details page described in section 8.2. Clicking on any of the pagination links at the bottom of the page will advance you to the next set of tasks in the list according to the applied filter and sort-order. There is also a drop-down-list at the bottom of the page which allows you

to specify how many rows should be displayed in each page, helping accommodate different user preferences.

One special column that is unique to tasks is the 'progress indicator'. This illustrates graphically both the percentage completion of the task and also if the task is either starting late or finishing late. The following table illustrates the different type of status that can be conveyed by the indicator:

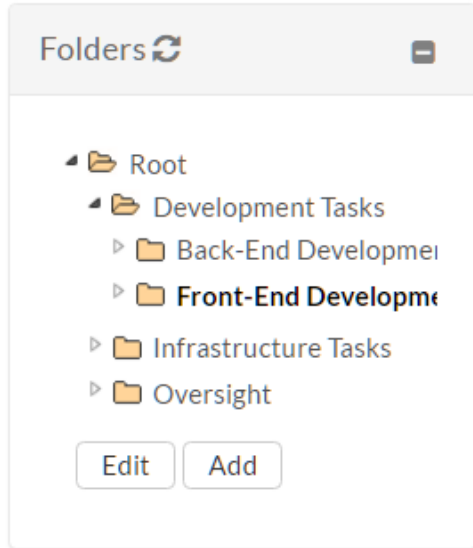
Indicator Display	Progress Description
	Task has not yet started, but the scheduled start date is still in the future.
	Task has not yet started, and the start date has elapsed. This is considered a 'Late Starting Task'
	Task has started, and is approximately 25% complete. The scheduled end date is still in the future.
	Task has started, and is approximately 50% complete. However the scheduled end date has elapsed already. This is a considered a 'Late Finishing Task'.
	Task has been 100% completed.

Essentially, the gray section of the bar indicates the % of the task yet to be completed, and the green/red section of the bar indicates the % of the task that has already been completed. If the bar changes from green to red it means that the end date has been reached and the task is not yet complete, and if the background changes from gray to yellow it means that the task has not yet started, but the scheduled start date has passed.

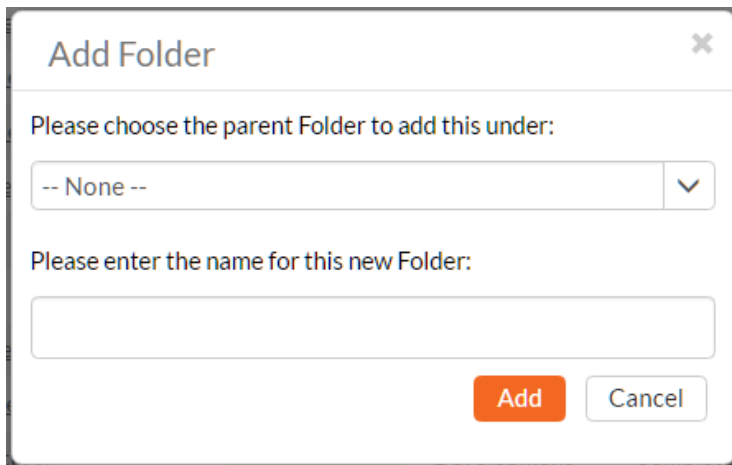
### 8.1.1. Task Folders

SpiraTeam lets you group project tasks into different folders to make organization easier. In the left-hand **Quick Filters** panel, the system displays the various task folders defined in the project:





If you are a project administrator, you will see the 'Edit' and 'Add' buttons beneath the folder tree, this lets you add, edit and delete task folders in the project. To add a new folder, click the 'Add' button:



Choose the parent folder that you want to add the new folder under (or None if you are adding a new top-level folder) from the dropdown list and then enter the name of the new folder. Then click 'Add' to save the new folder.

To edit or delete an existing folder, simply click the "Edit" button to switch the folder tree to edit mode. To edit or delete a specific folder, click on the "Edit" button next to the folder:

### Edit Folder ✕

Please choose the parent of this Folder:

Development Tasks ▼

Please edit the name of this Folder:

Front-End Development

Update
Delete
Cancel

You can change the parent folder and/or name of the folder and click “**Update**” to commit the change or click “**Delete**” to delete the folder entirely.

To move a task / tasks between folders, click and drag the relevant task/tasks from the table on the right, and drag them over the desired folder in the tree view on the left. The destination folder will be highlighted to show where the task will be placed.

### 8.1.2. Sorting and Filtering

You can easily filter and sort the list of tasks as illustrated in the screen-shot below:

+ New Task
✕ Delete
↻ Refresh
▼ Filter
📄 Clone
⚙️ Tools
-- Show/hide columns --

Displaying 1 - 2 out of 2 task(s) for this project Front-End Development Filtering results by Progress. Clear Filters ✕

Name ▲▼	Progress	Type ▲▼	Status ▲▼	Priority ▲▼	Owner ▲▼	Release ▲▼	ID ▲▼	Edit
<input type="checkbox"/> <input style="width: 100%;" type="text"/>	Running La	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	TK	<input type="button" value="Edit"/>
<input type="checkbox"/> <input checked="" type="checkbox"/> Develop new edition entry screen	<div style="width: 100%; height: 10px; background: linear-gradient(to right, red 50%, gray 50%);"></div>	Development	In Progress	1 - Critical	Fred Bloggs	1.0.0.0003	TK:21	<input type="button" value="Edit"/>
<input type="checkbox"/> <input checked="" type="checkbox"/> New Task	<div style="width: 100%; height: 10px; background: linear-gradient(to right, red 20%, gray 80%);"></div>	Development	In Progress		Amy E Cribbins	1.2.0.0	TK:44	<input type="button" value="Edit"/>

Show  rows per page Displaying page 1 of 1

To filter the list by progress, status, priority, owner or release, you simply choose an item from the appropriate drop-down list, and for the other fields, you enter a free-text phrase and click “**Filter**” or press the <ENTER> key to apply. Note that the name field is searched using a “LIKE” comparison, so that searching for “database” would include any item with the word database in the name. The other freetext fields need to be exact matches (e.g. dates, task numbers).

To change the column that is sorted, or to change the direction of the current sort, simply click on the up/down arrow icon in the appropriate column. The currently sorted column is indicated by the darker arrow. In the screen-shot above, we have filtered on tasks that are finishing late, sorted in order of decreasing priority.

Clicking on Filter > Clear Filter removes any set filters and expands the task list to display all tasks for the current project, and clicking on Filter > Save Filter allows you to save the filter to your 'My Page' for use in the future. The list of saved filters can also be retrieved by clicking Filter > Retrieve Filter.

As a shortcut, the left hand panel includes a set of **Quick Filters** that can be applied in a single-click:

- The topmost section displays any **saved filters** created by the current user or that are shared with the current user (the former are designated with an icon representing a single person, the latter a group of people)
- **Components** – This section lists the components defined for the current project. Clicking on any of the components in the list will filter the tasks to only show those that belong to the selected component. Tasks are linked to components indirectly through their associated requirement.
- **Releases** – This section lists the releases and iterations defined for the current project. Clicking on any of the releases or iterations in the list will filter the requirements by that release/iteration.

### 8.1.3. New Task

Clicking on the “[New Task](#)” button creates a new task in the grid with an initial set of information. You can click on the name of the task to edit its information.

### 8.1.4. Delete

Clicking on the “[Delete](#)” button deletes the tasks whose check-boxes have been selected in the task list.

### 8.1.5. Refresh

Clicking on the “[Refresh](#)” button simply reloads the list of tasks; this is useful when new tasks are being added by other users, and you want to make sure you have the most up-to-date list displayed.

### 8.1.6. Show / Hide Columns

This drop-down list allows you to change the fields that are displayed in the task list as columns for the current project. To show a column that is not already displayed, simply select that column from the list of “Show...” column names and to hide an existing column, simply select that column from the list of “Hide...” column names. This is stored on a per-project basis, so you can have different display settings for each project that you are a member of. The fields can be any of the built-in fields or any of the custom properties set up by the project owner.

### 8.1.7. Edit

Each task in the list has an “[Edit](#)” button display in its right-most column. When you click this button or just click on any of the cells in the row, you change the item from “View” mode to “Edit” mode. The various columns are made editable, and “[Save](#)” “[Cancel](#)” buttons are displayed in the last column:

Name ▲▼	Progress	Type ▲▼	Status ▲▼	Priority ▲▼	Owner ▲▼	Release ▲▼	ID ▲▼	Edit
<input type="checkbox"/>	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	TK	Edit
<input type="checkbox"/> Develop new book entry screen	<div style="width: 100%; height: 10px; background-color: green;"></div>	Development	Completed	1 - Critical	Fred Bloggs	1.0.0.0.0001	TK:1	Edit
<input type="checkbox"/> Develop edit book details scre	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developme	Completed	1 - Critical	Fred Bloggs	1.0.0.0.000		Save Cancel
<input type="checkbox"/> Refactor book screen to includ	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developme	Completed	1 - Critical	Joe P Smith	1.0.0.0.000		
<input type="checkbox"/> Develop book-subject association screen	<div style="width: 100%; height: 10px; background-color: green;"></div>	Development	Completed	1 - Critical	Fred Bloggs	1.1.0.0.0001	TK:10	Edit

If you click “**Edit**” on more than one row, the “**Save**” and “**Cancel**” buttons are only displayed on the first row, and you can make changes to all the editable rows and then update the changes by clicking the one “**Save**” button. Also, if you want to make the same change to multiple rows (e.g. to change five tasks from “Not Started” status to “In Progress”), you can click on the “fill” icon to the right of the editable item, which will propagate the new value to all editable items in the same column.

If you want to edit lots of items, first select their checkboxes and then click the “**Edit**” button on the same row as the Filters and it will switch all the selected items into edit mode.

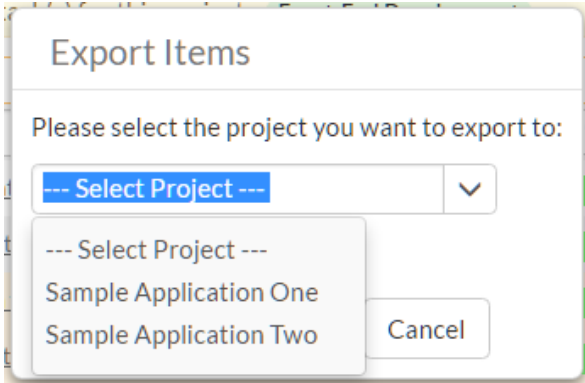
When you have made your updates, you can either click “**Save**” to commit the changes, or “**Cancel**” to revert back to the original information. Alternatively, pressing the <ENTER> key will commit the changes and pressing the <ESCAPE> key will cancel the changes.

### 8.1.8. Duplicating Tasks

To create a clone of a task or set of tasks, select the check-boxes of the tasks you want to clone and then click “**Clone**”. This will make a clone of the current task in the current folder with its name prefixed ‘Copy of ...’ to distinguish itself from the original. Any file attachments will also be copied along with the task itself.

### 8.1.9. Exporting Tasks to Another Project

To export a task or set of tasks from the current project to another project in the system, select the check-boxes of the task(s) you want to export and then click Tools > Export to Project. This will bring up a list of possible destination projects:



Once you have chosen the destination project and clicked the “**Export**” button, the tasks will be exported from the current project to the destination project. Any file attachments will also be copied to the destination project along with the tasks.

### 8.1.10. Printing and Saving Items

To quickly print a single task or list of tasks you can select the items’ checkboxes and then click Tools > Print Items. This will display a popup window containing a printable version of the selected items. You can also save the report in a variety of common formats from the same Tools menu.

## 8.2. Task Details

When you click on a task item in the lists displayed on either the main task list page or on the requirement / release details pages, you are taken to the task details page illustrated below:

This page is made up of *three* areas;

1. the left pane displays the tasks list navigation;
2. the right pane's header, which displays: the operations toolbar; the editable name of the selected task; and the info bar (with a shaded background), which also contains the workflow status transitions (see below); and
3. the right pane's tabbed interface with rich information related to the task.

Please note that on smaller screen sizes the navigation pane is not displayed. While the navigation pane has a link to take you back to the tasks list, on mobile devices a 'back' button is shown on the left of the operations toolbar.

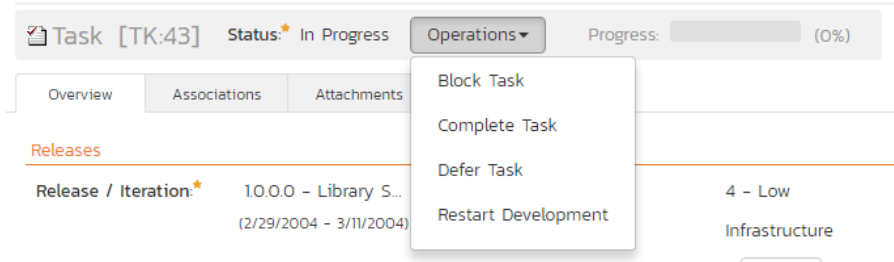
The navigation pane can be collapsed by clicking on the "-" button, or expanded by clicking anywhere on the gray title area. On desktops the user can also control the exact width of the navigation pane by dragging and dropping a red handle that appears on hovering at the rightmost edge of the navigation pane.

The navigation pane consists of a link that will take you back to the task list, as well as a list of tasks, and another list of the other related tasks, nested under their parent task. This latter list is useful as a navigation shortcut; you can quickly view the peer tasks by clicking on the navigation links without having to first return to the tasks list pages. The navigation list can be switched between five different modes:

- **Current Filter** - The list of tasks matching the current filter organized by task folder
- **All Items** - The list of all tasks, irrespective of the current filter, organized by task folder
- **Assigned** - The list of tasks assigned to the current user grouped by their parent requirement
- **For Release** - The list of tasks assigned to the current release or iteration, grouped under that parent release/iteration.
- **For Requirement** – The list of tasks associated to the same requirement as the current task as well as other tasks at the same level in the requirement hierarchy.

On the main right hand side of the page, which of the fields for the currently selected task are available and which are required will depend on your stage in the task workflow. For example, a completed task might not require a "Release" whereas an In Progress task could well do. The types of change allowed and the fields that are enabled/visible/required will depend on how your project administrator has set up the system for you. Administrators should refer to the *SpiraTeam Administration Guide* for details on configuring the task workflows to better meet their needs.

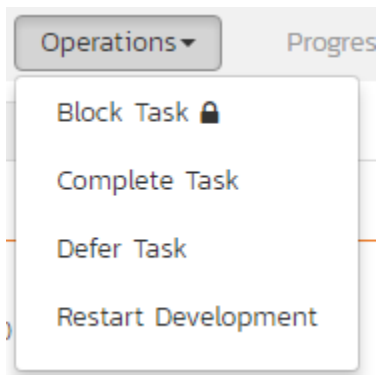
Depending on the user's role and whether they are listed as the owner or author of the task, displayed in the info bar beneath the task name is the current workflow status and an "operations" button which, when clicked, will show a set of allowed workflow operations:



These workflow transitions allow the user to move the item from one status to another. For example when the task is in the In Progress status, you will be given the options to:

- **Block Task** – changes status to “Blocked”
- **Complete Task** – changes the status to “Completed”
- **Defer Task** – changes the status to “Deferred”
- **Restart Development** – changes the status to “Not Started”

Please note that if digital signatures have been enabled for a particular workflow operation (and therefore a digital signature is required to confirm the status change. Workflow operations requiring a digital signature are marked with a padlock icon as in the example below:



On attempting to save changes made after clicking a workflow operation that requires a digital signature you will be presented with a popup similar to the one below (which is for a requirement):

Enter Electronic Signature

Please enter your login/password together with the meaning and click Sign:

Login:\* fredbloggs

Password:\*

Meaning:\* Changing Requirement RQ:4 from 'Developed' to 'In Progress'

Cancel Sign

Once you've made the changes to the appropriate task fields, you can either click "**Save**" or one of the options from the "**Save**" dropdown to commit the changes, or "**Refresh**" to discard the changes and reload the task from the database. In addition you can print or export the current task to a number of common formats via the Tools menu.

To send the task to a colleague click the email button:

Email this artifact to

Project User: Amy E Cribbins

Select a user in the project to send to.

Email Addresses:

A list of email addresses, separated by ;

Message Subject:

Leave blank for default.

Send Cancel

You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user. The content of the email is specified in the System Administration – Notification Templates.

The lower part of the right pane can be in one of *four* possible tabs that can be selected: "Overview Properties", "Attachments", "History" and "Associations". Each of the different views is described separately below.



## 8.2.1. Overview – Details

The Overview tab is divided into a number of different sections. Each of these can be collapsed or expanded by clicking on the title of that section. It displays the description, fields and comments associated with the task.

The top part of this tab displays the various standard fields and custom properties associated with the task. Fields (both standard and custom) are grouped under the collapsible headings (marked by orange text and underline) in the screenshot below. For instance, all fields regarding dates are grouped together in the “Dates and Times” area.

Overview Associations Attachments History #

**Releases**

Release / Iteration\* 1.0.0.0 - Library S... (2/29/2004 - 3/11/2004)

**Properties**

Priority: 4 - Low

Type\* Infrastructure

Requirement: - Change

Component: -

Difficulty: --- Please Select ---

**Dates and Times**

Creation Date: 11/30/2003 7:00:00 PM

Last Updated: 10/10/2017 2:38:11 PM

Start Date\* 2/29/2004

End Date\* 3/1/2004

Projected Effort (h): 3.0h

Est. Effort (h)\* 3.00

Actual Effort (h):

Remaining Effort (h): 3.00

**People**

Creator\*  Joe P Smith

Owner\*  Joe P Smith

Reviewer:  --- Please Select ---

**Detailed Information**

Description:

### 8.2.1.1. Effort Fields

You can enter/edit the start-date, end-date (i.e. the due-date), estimated, actual and remaining effort. From this the system will calculate the progress, percentage complete and projected final effort.

The different effort values mean the following:

- **Estimated Effort** – This is the original estimate for how long the task would take to complete.
- **Actual Effort** – This is the current amount of effort that has been expended in completing the task. This does not indicate the completion progress
- **Remaining Effort** – This is the estimate for how it will take from the current state to complete the task. The % complete is calculated from this value in conjunction with the estimated effort:  
$$\% \text{ Complete} = 100\% - (\text{Remaining Effort} / \text{Estimated Effort})$$
- **Projected Effort** – This is value that the system is projecting it will take to complete the task. This is calculated from the Actual Effort and Remaining Effort:

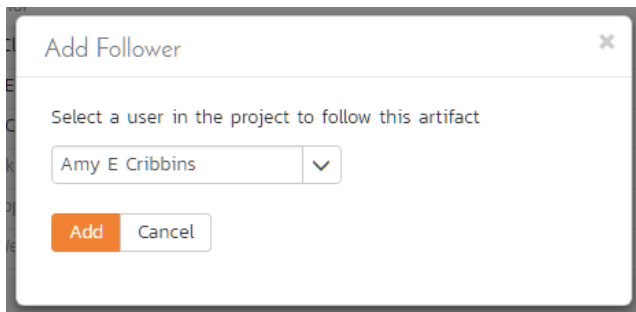
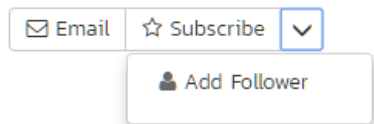
Projected Effort = (Actual Effort + Remaining Effort)

**Note:** If the actual effort is not specified, the projected effort will be the same as the estimated effort.

**Note:** if the task is currently assigned to a release or iteration, the start-date and end-date of the task must lie within the date-range of the parent release/iteration. If your task looks like it will not be completed in the available timeframe, you will need to contact the project manager to get them to either extend the date-range of the task, or consider moving the task to the next iteration.

### 8.2.1.2. Followers

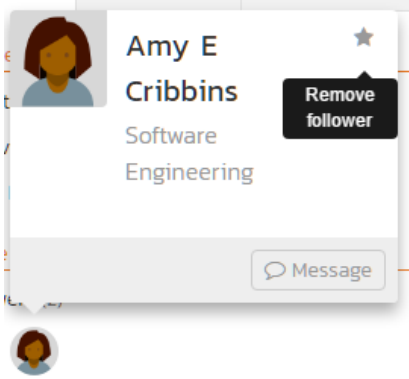
Using the “**Subscribe**” button on the toolbar, you can quickly follow the item, and receive updates on certain changes to it. Depending on your role, you may also see a dropdown to this button, which let’s you add another project member as a follower to this item.



You can also quickly see who is following an incident under the “People” section in the Overview tab.

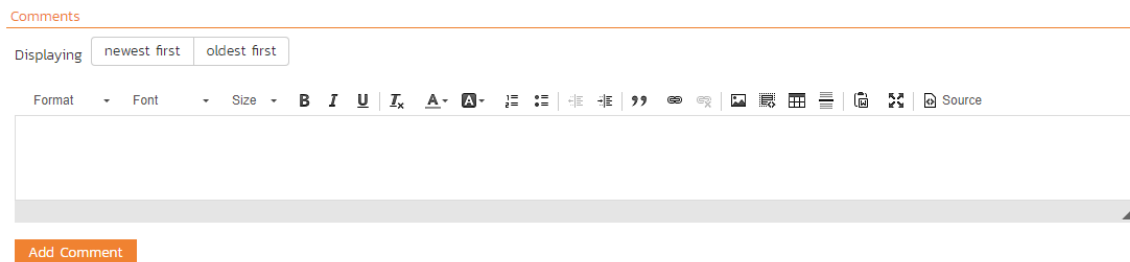


To view information about the follower, or to unfollow them from the item, hover over their avatar to display a user profile card.



### 8.2.2. Overview – Comments

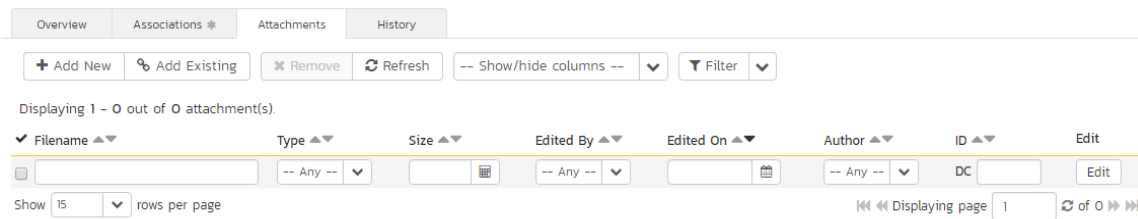
The comments tab will display the comments associated with the task:



All existing comments are displayed in date entered underneath the textbox. To enter a new comment, enter the text into the textbox, and then click the “[Add Comment](#)” button.

### 8.2.3. Attachments

This tab displays the list of documents that have been “attached” to the task. The documents can be in any format, though SpiraTeam® will only display the icon for certain known types.



The attachment list includes the filename that was originally uploaded together with the file-size (in KB), name of the person who attached it and the date uploaded. In addition, if you position the pointer over the filename and hold it there for a few seconds, a detailed description is displayed as a tooltip.

To actually view the document, simply click on the filename hyperlink and a new web browser window will open. Depending on the type of file, this window will either display the document or prompt you for a place to save it on your local computer. To remove an existing attachment from a task, click the "**Remove**" button and the attachment will be removed from the list.

To attach a new document or web link to the task, you need to click the "**Add New**" button to open the "Add Attachment" dialog box. There are three different types of item that can be attached to a task:

- To upload a file, choose "File" as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the "**Upload**" button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose "URL" as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the "**Upload**" button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose "Screenshot" as the type and then copy the image to your computer's clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click "**Upload**" to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn't put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

You can also associate an existing document (that's already stored in SpiraTeam) with the task. To do that, click the "**Add Existing**" button to bring up the add file association dialog box. You can then choose to either associate a document stored in the SpiraTeam Documents repository or (in the case of SpiraPlan/SpiraTeam but not SpiraTest) from the linked source code repository. In either case you first select the appropriate folder, and then pick the document(s) from the file list on the right. In the case of a source code file association you can also add a comment.

#### **8.2.4. History**

This tab displays the list of changes that have been performed on the task since its creation. An example task change history is depicted below:

Overview Associations \* Attachments History

Refresh Filter Admin View

Displaying 1 - 0 out of 0 change(s).

Change ID	Change Date	Field Name	Old Value	New Value	Changed By	Change Type
					-- Any --	-- Any --

Show 15 rows per page

Displaying page 1 of 1

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “Admin View” hyperlink to revert any unwanted changes.

### 8.2.5. Associations

In this mode, the main pane displays a list of any incidents, source code revisions or other tasks that are associated with this task:

Overview Associations \* Attachments History

+ Add Remove Refresh Filter

Displaying 1 - 2 out of 2 association(s).

Type	Artifact Type	Name	Status	Creation Date	Creator	Comment	Project Name	ID	Edit
Related-to	Incident	<a href="#">Validation on the edit book page</a>	Resolved	30-Jun-2010	Joe P Smith	Need to refactor the screen before fixing the bug	Library Information System	[IN:11]	Edit
Depends-on	Task	<a href="#">Develop edit book details screen</a>	Completed	30-Apr-2010	Joe P Smith	Need to create the screen before refactoring	Library Information System	[TK:4]	Edit

Show 15 rows per page

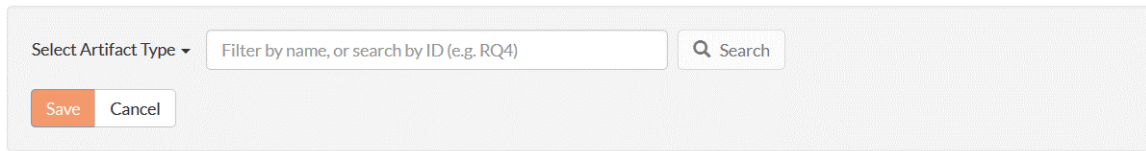
Displaying page 1 of 1

Each association is displayed with the type of association (related-to, vs. a dependency), name of the artifact being linked-to, type of artifact (task, incident, etc.), the name of the person who created the association, and a comment that describes why the association was made.

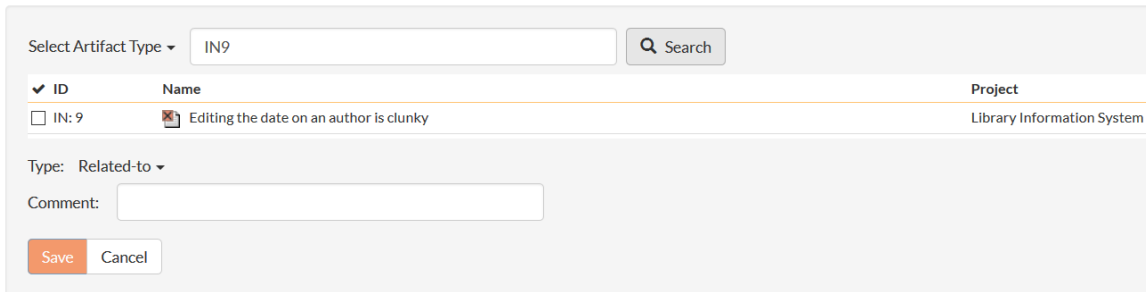
You can perform the following actions:

- **Remove** – removes the selected association to the other artifact. This will only delete the association, not the linked artifact itself.
- **Refresh** – updates the list of associations from the server, useful if other people are adding associations to this task at the same time.
- **Apply Filter** – Applies the entries in the filter boxes to the list of associations
- **Clear Filters** – Clears the current filter, so that all associations for the current task are shown.
- **Edit** – Clicking the “[Edit](#)” button to the right of the associations allows you to edit the association type and comment fields inline directly on this screen.

To create a new association, click the “**Add**” button to display the add association panel:



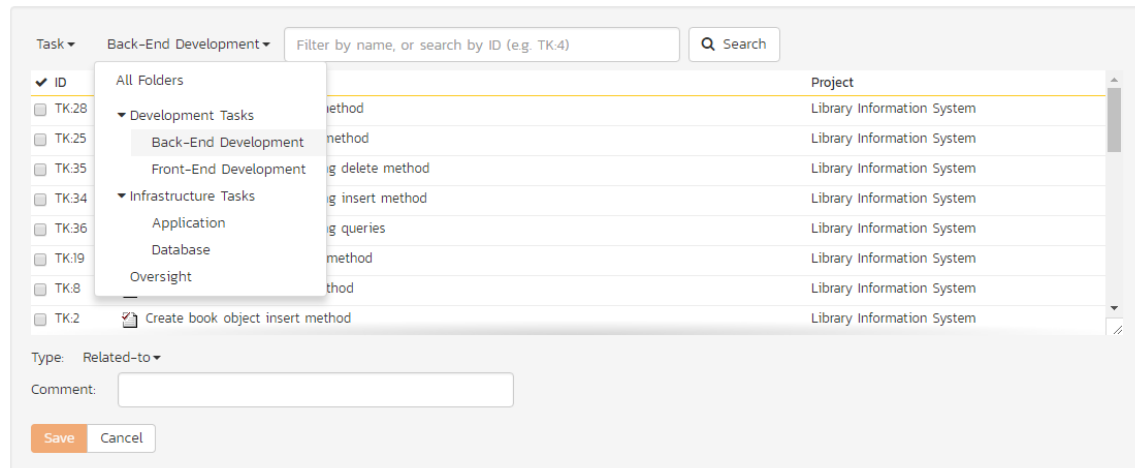
If you know the ID of the item you want to associate, you can enter its ID prefixed by the appropriate token (“TK” for task or “IN” for incident):



<input checked="" type="checkbox"/> ID	Name	Project
<input type="checkbox"/> IN: 9	Editing the date on an author is clunky	Library Information System

Type: Related-to ▾  
Comment:

Otherwise you should choose the Artifact Type. You can narrow down your search by entering a keyword.



<input checked="" type="checkbox"/> ID	Name	Project
<input type="checkbox"/> TK:28	method	Library Information System
<input type="checkbox"/> TK:25	method	Library Information System
<input type="checkbox"/> TK:35	g delete method	Library Information System
<input type="checkbox"/> TK:34	g insert method	Library Information System
<input type="checkbox"/> TK:36	g queries	Library Information System
<input type="checkbox"/> TK:19	method	Library Information System
<input type="checkbox"/> TK:8	thod	Library Information System
<input type="checkbox"/> TK:2	Create book object insert method	Library Information System

Type: Related-to ▾  
Comment:

Once you have a list of artifacts, you should select the checkboxes of the items you want to associate with the current task and click the ‘Save’ button.

You can add a comment that explains the rationale for the association and choose the type of association being created:

- **Related-to:** this is used to specify that the two artifacts are simply related
- **Depends-on:** this is used to specify that the current artifact has a dependency on the one being linked to.

### 8.3. Task Board

The task board is an alternative to the task list page (described in section 8.1) designed to let you view the tasks planned for the current project. You can access this feature by clicking on the **Board** icon in the top-right of the Tasks list page. You can switch back to the Task list page by clicking on the **Table** view.

The task board has the following different display modes:

- All Releases
  - By Release
  - By Priority
  - By Status
  - By Person
- Release
  - By Iteration
  - By Priority
  - By Status
  - By Person
- Iteration
  - By Priority
  - By Status
  - By Person

Each of these views is described below:

#### 8.3.1. Tasks – By Priority

This view is designed to let you see the list of planned tasks organized by priority. Each of the possible priority values is displayed on the left-hand side and the tasks displayed in the same row on the right:

Library Information System | Search | Planning | Testing | Tracking | Reporting

Incidents / Tasks / Resources / Source Code

Planning: (All Releases) | Group By: By Priority | Detailed View

- (Unassigned Items)
  - TK-1: Develop new book entry screen (7.3h)
  - TK-3: Write book object insert queries (3.0h)
  - TK-4: Develop edit book details screen (7.3h)
  - TK-21: Develop new edition entry screen (9.0h)
  - TK-22: Create edition object insert method (5.8h)
  - TK-23: Write edition object insert queries (3.0h)
- 2 - High
  - TK-24: Develop edit author details screen (8.0h)
  - TK-25: Create author object update method (5.0h)
  - TK-26: Write author object update queries (3.0h)
  - TK-27: Refactor author screen to include delete button (6.0h)
  - TK-28: Create author object delete method (4.8h)
  - TK-29: Write author object delete query (3.1h)
  - TK-30: Refactor author details page to include contact info
  - TK-31: Update author select query to include contact info
  - TK-32: Update author update/insert queries to include contact info
- 3 - Medium
  - TK-37: Develop new subject entry screen (7.0h)
  - TK-38: Create subject object insert method (3.0h)
  - TK-39: Write subject object insert queries (3.0h)
  - TK-40: Develop edit subject details screen (7.0h)
  - TK-41: Create subject object update method (5.0h)
  - TK-42: Write subject object update queries (3.0h)

The top section will contain the list of tasks that are not assigned a priority, with the other sections containing the tasks that have been assigned to the specific priority.

### 8.3.2. Tasks – By Status

This view is designed to let you see the tasks in the current project / release / iteration organized by their status. Each task status (not started, in progress, completed, blocked, deferred) is displayed as a heading, with the tasks displayed in the same column underneath:

Library Information System | Search | Planning | Testing | Tracking | Reporting

Incidents / Tasks / Resources / Source Code

Planning: (All Releases) | Group By: By Status

- (Unassigned Items)
- Not Started
  - TK-23: Write edition object insert queries (3.0h)
  - TK-24: Develop edit author details screen (8.0h)
  - TK-25: Create author object update method (5.0h)
  - TK-26: Write author object update queries (3.0h)
  - TK-27: Refactor author screen to include delete button (6.0h)
  - TK-30: Refactor author details page to include contact info
- In Progress
  - TK-21: Develop new edition entry screen (9.0h)
  - TK-22: Create edition object insert method (5.8h)
  - TK-28: Create author object delete method (4.8h)
  - TK-29: Write author object delete query (3.1h)
- Completed
  - TK-1: Develop new book entry screen (7.3h)
  - TK-2: Create book object insert method (5.3h)
  - TK-3: Write book object insert queries (2.8h)
  - TK-4: Develop edit book details screen (7.3h)
  - TK-5: Create book object update method (6.0h)
  - TK-6: Write book object update queries (3.5h)

You can click on the expand/collapse icons to hide any resources that are not relevant.



Depending on the view (all releases, release, or iteration), there may be sections with the release and iteration name. You can drag and drop the tasks between statuses or to/from the release/iteration backlog. Any tasks not assigned to a release/iteration will be listed in the (Unassigned Items) section at the top.

Planning: 1.0.0.0.0001 - Iteration 0... Group By: By Status

(Unassigned Items)

1.0.0.0 - Library System Release 1 Available: 216.0h Utilized: 103.8h Remaining: 112.3h

1.0.0.0.0001 - Iteration 001 Available: 96.0h Utilized: 40.5h Remaining: 55.5h

Not Started	In Progress	Completed
<p>TK:3 Write book object insert queries 2.8h</p>	<p>TK:1 Develop new book entry screen 7.3h</p> <p>TK:4 Develop edit book details screen 7.3h</p>	<p>TK:2 Create book object insert method 5.3h</p> <p>TK:5 Create book object update method 6.0h</p> <p>TK:6 Write book object update queries 3.5h</p>

### 8.3.4. Tasks - By Person

This view is designed to let you see the tasks in the current project / release / iteration organized by resource / person. Each of the users that is a member of the current project is displayed as a heading, with the tasks displayed in the same column underneath. This view is often called the **Task Board**:

The screenshot shows the 'Library Information System' planning interface. At the top, there is a search bar and navigation tabs for 'Planning', 'Testing', 'Tracking', and 'Reporting'. Below the navigation, the current view is 'Planning: (All Releases)' and 'Group By: By Person'. The main area is divided into three columns, one for each resource:

- Donna Harkness:** Available: 0.0h, Utilized: 0.3h, Remaining: 0.0h. Tasks: TK-21 (Develop new edition entry screen, 9.0h), TK-22 (Create edition object insert method, 5.8h), TK-23 (Write edition object insert queries, 3.0h).
- Fred Bloggs:** Available: 0.0h, Utilized: 123.6h, Remaining: 0.0h. Tasks: TK-1 (Develop new book entry screen, 7.3h), TK-2 (Create book object insert method, 5.3h), TK-3 (Write book object insert queries, 2.8h), TK-4 (Develop edit book details screen, 7.3h), TK-10 (Develop book-subject association screen, 8.3h).
- Joe Smith:** Available: 0.0h, Utilized: 103.9h, Remaining: 0.0h. Tasks: TK-5 (Create book object update method, 6.0h), TK-6 (Write book object update queries, 3.5h), TK-7 (Refactor book screen to include delete button, 7.7h), TK-8 (Create book object delete method, 4.2h), TK-9 (Write book object delete query, 3.3h).

You can click on the expand/collapse icons to hide any resources that are not relevant. The system will display a progress bar for each resource to illustrate the allocation for that resource. Any resource that has a progress bar that is completely green has been fully scheduled and should not have any additional tasks assigned. If the progress bar for that resource turns red, it means that they have been over-scheduled and you need to reassign some of the tasks.

The screenshot shows the 'Library Information System' planning interface in a different view. At the top, there is a search bar and navigation tabs for 'Planning', 'Testing', 'Tracking', and 'Reporting'. Below the navigation, the current view is 'Planning: 10.0.0.0001 - Iteration 0...' and 'Group By: By Person'. The main area is divided into four columns, one for each resource:

- System Administrator:** Available: 32.0h, Utilized: 0.0h, Remaining: 32.0h.
- Fred Bloggs:** Available: 32.0h, Utilized: 22.8h, Remaining: 9.2h. Tasks: TK-1 (Develop new book entry screen, 7.3h), TK-2 (Create book object insert method, 5.3h), TK-3 (Write book object insert queries, 2.8h), TK-4 (Develop edit book details screen, 7.3h).
- Donna Harkness:** Available: 32.0h, Utilized: 0.0h, Remaining: 32.0h.
- Joe Smith:** Available: 32.0h, Utilized: 17.5h, Remaining: 14.5h. Tasks: TK-5 (Create book object update method, 6.0h), TK-6 (Write book object update queries, 3.5h).

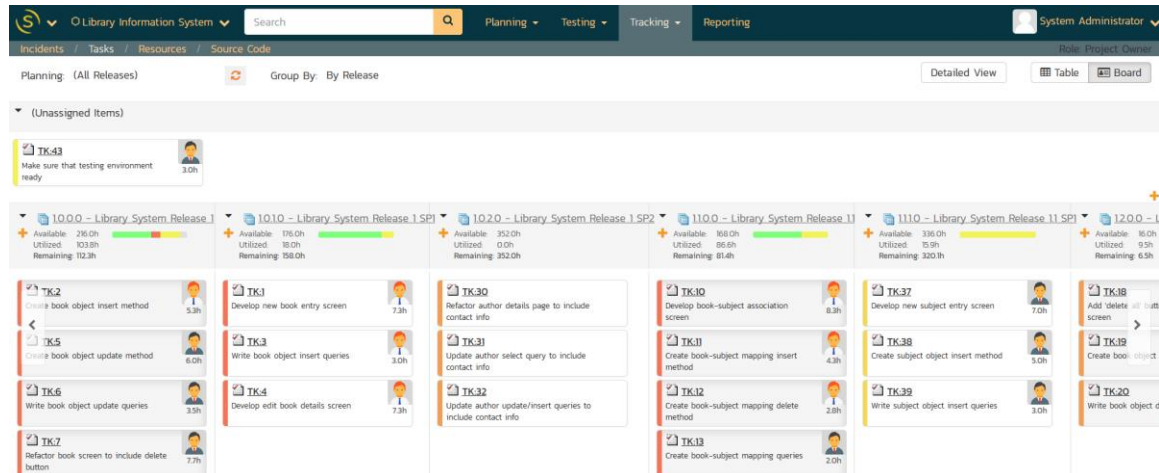
At the top of the main area, there are two sections for backlogs:

- 10.0.0 - Library System Release\_1:** Available: 216.0h, Utilized: 103.6h, Remaining: 112.4h.
- 10.0.0.0001 - Iteration 00:** Available: 96.0h, Utilized: 40.3h, Remaining: 55.7h.

Depending on the view (all releases, release, or iteration), there may be sections with the release and iteration name; they contain tasks that are scheduled for the current release or iteration but have not yet been assigned to a resource. You can drag and drop the tasks between resources or to/from the release/iteration backlog. Any tasks not assigned to a resource and release/iteration will be listed in the (Unassigned Items) section at the top.

### 8.3.4. Tasks - By Release

This view is only available when you are displaying the task board for 'all releases'. Each of the active releases defined for the current project is displayed as a heading, with the tasks displayed in the same column underneath



You can drag and drop the tasks between the different releases. Once the task has been added to the release, the utilized effort for the release will increase, and the available effort will decrease by the same amount.

Note: The system will allow you to assign more tasks to a release than it is possible to complete, however this will result in a negative value for 'available effort'. If this happens, the "Available Effort" value will be displayed in red, and you need to rebalance the items, extend the release length or add project personnel resources to the release.

Clicking on the release hyperlinks in the headers will switch the task board into the release view.

### 8.3.4. Tasks - By Iteration

This view is only available when you are displaying the task board for a specific release. Each of the iterations defined for the current release is displayed as a heading, with the tasks displayed in the same column underneath. This view is commonly used in **Scrum** projects:

The screenshot displays the Jira project management interface for 'Library Information System'. The top navigation bar includes 'Planning', 'Testing', 'Tracking', and 'Reporting'. Below the navigation, the current view is 'Planning' for the '10.0.0 - Library System' project, grouped by 'Iteration'. The interface shows a list of tasks and their distribution across three iterations:

- Iteration 001 (10.0.0.0001):** Available: 96.0h, Utilized: 22.0h, Remaining: 73.2h. Tasks include TK2 (3.0h), TK5 (6.0h), and TK6 (3.0h).
- Iteration 002 (10.0.0.0002):** Available: 24.0h, Utilized: 31.2h, Remaining: -7.2h (displayed in red). Tasks include TK7 (7.2h), TK9 (3.3h), TK25 (5.0h), TK8 (4.2h), TK24 (8.0h), and TK26 (3.0h).
- Iteration 003 (10.0.0.0003):** Available: 72.0h, Utilized: 31.0h, Remaining: 40.3h. Tasks include TK27 (6.0h), TK29 (3.1h), TK22 (5.0h), TK28 (4.8h), TK21 (9.0h), and TK23 (3.0h).

You can drag and drop the tasks between the different iterations. Once the task has been added to the iteration, the utilized effort for the iteration will increase, and the available effort will decrease by the same amount.

Note: The system will allow you to assign more tasks to an iteration than it is possible to complete, however this will result in a negative value for 'available effort'. If this happens, the "Available Effort" value will be displayed in red, and you need to rebalance the items, extend the iteration length or add project personnel resources to the iteration.

Clicking on the iteration hyperlinks in the headers will switch the task board into the iteration view.

## 9. Resource Tracking

This section outlines how you can use the Resource Tracking features of SpiraPlan® and SpiraTeam® to view the total workload for each of the project personnel resources assigned to a specific project. This allows you to verify that the work is evenly distributed amongst the project members and that no individual resource is overloaded.

When you click Tracking > Resources on the global navigation bar, you will initially be taken to the project resources list screen illustrated below:

The screenshot shows the SpiraPlan interface for the 'Library Information System' project. The 'Tracking' menu is active, and the 'Resources' sub-menu is selected. The page displays a table of 12 resources. The 'Allocation' column shows progress bars for each resource, with some resources like Fred Bloggs and Joe Smith showing red bars, indicating they are over-scheduled. The 'Remaining Effort' column for these resources is also highlighted in red. The table includes columns for Resource Name, Role, Allocation, Available Effort, Req / Task Effort, Incident Effort, Total Effort, and Remaining Effort. The user is logged in as 'System Administrator'.

Resource Name	Role	Allocation	Available Effort	Req / Task Effort	Incident Effort	Total Effort	Remaining Effort	ID
Amy Cribbins	Incident User			0.0h	0.0h	0.0h		US:13
Bernard Tylert	Developer			0.0h	0.0h	0.0h		US:11
Donna Harkness	Tester			0.0h	0.0h	0.0h		US:6
Fred Bloggs	Manager			136.1h	11.5h	147.6h		US:2
Henry Cooper	Tester			0.0h	0.0h	0.0h		US:12
Jack Van Stanten	Developer			0.0h	0.0h	0.0h		US:7
Joe Smith	Observer			137.3h	14.9h	152.2h		US:3
Martha Noble	Tester			0.0h	0.0h	0.0h		US:10
Ricky Pond	Developer			0.0h	0.0h	0.0h		US:5
Rory Jones	Developer			0.0h	0.0h	0.0h		US:9
Rose Smith	Tester			0.0h	0.0h	0.0h		US:8
System Administrator	Project Owner			0.0h	0.0h	0.0h		US:1

This screen lists all the personnel (project resources) that belong to the current project together with the total value of the projected effort of all the work assigned to them, the available effort based on the length of the current release/iteration, and the remaining effort (the difference between the previous two values). The effort is shown for tasks and incidents as well as a total of the two together.

Using the dropdown on the far right, you can display the workload:

- For the project as a whole (as above).
- For a specific release (including all child iterations)
- For a specific iteration

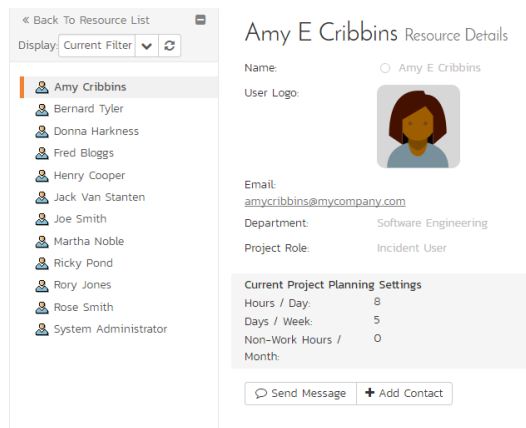
You can also display the workload for the entire program by selecting the program from the project/program selector from the navigation bar

There is a colored progress bar column called “Allocation” that graphically illustrates the % of the person’s available effort that has been scheduled. If a person is over-scheduled, this bar will turn red. In addition, if any project resources have been assigned more work that they have time to complete during the length of the release/iteration, the background color of the remaining effort value will be also be colored in red, indicating that you need to offload some of the work to other project resources.

Clicking on a resource name will take you to the Resource Details page.

## 9.1 Resource Details

The resource details page will show you what artifacts a resource has been assigned, and time values for the items. A small panel on the left will show current configured values for the project for # of hours per workday, # of days per week, and how many non-work hours per month there are.



There are two options related to the instant messenger beneath the user's avatar. When you click the "[Send Message](#)" button it will open up a new instant message window to start a conversation with the selected resource. If the resource is not a contact of the current user, clicking the "[Add Contact](#)" button adds the selected resource to the user's 'My Contacts' list on the 'My Page' dashboard. Similarly if the resource is already a contact of the current user, clicking 'Remove Contact' will remove the resource as a contact.

Tabs along the bottom will show assigned requirements and tasks, incidents, test cases, test sets and recent actions. The views for each item are a subset of available columns, to show progress and completion information for all items listed. Clicking on an artifact's name will take you to the artifact details page. The data in all of these tabs can be filtered by all releases, by a release and its children, or by a specific iteration.

### 9.1.1. Reqs & Tasks

This tab displays the list of requirements and child tasks that are assigned to the current resource:

Display data for:

--- All Releases ---

Reqs & Tasks \* Incidents \* Test Cases \* Test Sets \* Actions \*

Refresh Filter Show Level --- Displaying 17 out of 8 item(s).

Requirement/Task Name	Importance	Progress	Owner	Est. Effort	Actual Effort	Projected Effort	Edit
	-- Any --	-- Any --	-- Any --				Edit
Ability to delete existing books in the system	1 - Critical	<div style="width: 100%; height: 10px; background-color: green;"></div>	Fred Bloggs	16.0h	15.2h	0.0h	Edit
Ability to completely erase all books stored in the system with one click	1 - Critical	<div style="width: 100%; height: 10px; background-color: green;"></div>	Fred Bloggs	10.0h	9.5h	0.0h	Edit
Ability to create different editions	1 - Critical	<div style="width: 75%; height: 10px; background-color: green;"></div>	Fred Bloggs	16.0h	10.3h	7.5h	Edit
Ability to edit existing authors in the system	2 - High	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	Fred Bloggs	16.0h	0.0h	16.0h	Edit
Ability to delete existing authors in the system	2 - High	<div style="width: 50%; height: 10px; background-color: yellow;"></div>	Fred Bloggs	14.0h	3.2h	10.8h	Edit
Ability to link authors to their contact information	2 - High	<div style="width: 0%; height: 10px; background-color: yellow;"></div>	Fred Bloggs	0.0h	0.0h	0.0h	Edit
Ability to import from legacy system x	4 - Low	No Tasks	Fred Bloggs				Edit

### 9.1.2. Incidents

This tab displays the list of incidents that are assigned to the current resource:

Display data for:

--- All Releases ---

Reqs & Tasks \* Incidents \* Test Cases \* Test Sets \* Actions \*

Name	ID	Creation Date	Status	Priority	Severity	Progress	Est. Effort	Projected Effort
Ability to associate multiple authors	[IN.000021]	16-Nov-2003	Assigned	1 - Critical	1 - Critical	<div style="width: 25%; height: 10px; background-color: green;"></div>	0.3	0.4
Test System Limitation	[IN.000046]	3-Dec-2003	Assigned	1 - Critical		<div style="width: 75%; height: 10px; background-color: green;"></div>	0.7	0.8
Test Training Item	[IN.000040]	2-Dec-2003	Assigned	1 - Critical	2 - High	<div style="width: 50%; height: 10px; background-color: green;"></div>	0.5	0.5
Editing the date on a book is clunky	[IN.000008]	3-Nov-2003	Assigned	2 - High	4 - Low	<div style="width: 75%; height: 10px; background-color: green;"></div>	0.4	0.4
Test Training Item	[IN.000041]	2-Dec-2003	Assigned	2 - High		<div style="width: 75%; height: 10px; background-color: green;"></div>	0.7	0.7
Test Change Request	[IN.000053]	6-Dec-2003	Assigned	3 - Medium		<div style="width: 50%; height: 10px; background-color: green;"></div>	0.5	0.5
Ability to import data from excel	[IN.000023]	24-Nov-2003	Assigned	3 - Medium	2 - High	<div style="width: 75%; height: 10px; background-color: green;"></div>	0.5	0.5
Test System Limitation	[IN.000048]	3-Dec-2003	Assigned	3 - Medium	3 - Medium	<div style="width: 100%; height: 10px; background-color: green;"></div>	13	15
Sample Risk 3	[IN.000061]	9-Dec-2003	Assigned	4 - Low	4 - Low	<div style="width: 75%; height: 10px; background-color: green;"></div>	0.7	0.9

### 9.1.3. Test Cases

This tab displays the list of test cases that are assigned to the current resource:

Display data for:

--- All Releases ---

Reqs & Tasks \* Incidents \* Test Cases \* Test Sets \* Actions \*

Name	ID	Last Executed	Execution Status	Priority	Est. Dur.
Ability to create new book	[TC.000002]	30-Nov-2003	Passed	1 - Critical	0.2h
Ability to edit existing book	[TC.000003]	30-Nov-2003	Caution	1 - Critical	0.1h

### 9.1.4. Test Sets

This tab displays the list of test sets that are assigned to the current resource:

Display data for:

--- All Releases ---

Reqs & Tasks *	Incidents *	Test Cases *	Test Sets *	Actions *			
Name	ID	Status	Planned Date	Execution Status	Last Executed	Est. Dur.	Act. Dur.
Exploratory Testing	[TX-000006]	Deferred	-	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	-	h	h
Regression Testing for Windows 8	[TX-000003]	Completed	-	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	-	0.3h	h
Testing New Functionality	[TX-000005]	In Progress	9-Feb-2007	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>	-	0.3h	h

### 9.1.5. Actions

This tab displays the list of recent actions made by the user in the project. It lets you quickly see all the changes they have made:

Reqs & Tasks *	Incidents *	Test Cases *	Test Sets *	Actions *		
Change Date ▲▼	Project ▲▼	Artifact Type ▲▼	Artifact Name ▲▼	Artifact ID ▲▼	Change Type ▲▼	
Refresh	Filter	Displaying 1 - 8 out of 8 items.				
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	2-May-2006	Library Information System [PR:1]	Incident	Cannot add a new book to the system	[IN:7]	Modified
<input type="checkbox"/>	2-May-2006	Library Information System [PR:1]	Requirement	Ability to add new books to the system	[RQ:4]	Modified
<input type="checkbox"/>	2-May-2006	Library Information System [PR:1]	Test Step	User clicks link to create author	[TS:3]	Modified
<input type="checkbox"/>	2-May-2006	Library Information System [PR:1]	Release	Library System Release 1	[RL:1]	Modified
<input type="checkbox"/>	2-May-2006	Library Information System [PR:1]	Test Case	Ability to create new book	[TC:2]	Modified
<input type="checkbox"/>	5-Mar-2005	Library Information System [PR:1]	Incident	Cannot add a new book to the system	[IN:7]	Modified
<input type="checkbox"/>	5-Mar-2005	Library Information System [PR:1]	Incident	The book listing screen doesn't sort	[IN:6]	Modified
<input type="checkbox"/>	4-Mar-2005	Library Information System [PR:1]	Incident	The book listing screen doesn't sort	[IN:6]	Modified
Show	15	rows per page		Displaying page	1	of 1

This can be useful when auditing the changes made by a specific user.



## 10. Document Management

This section outlines the document management features of SpiraTeam® that can be used to upload, manage and share documents between the different members of the project. This module includes support for uploading files and URLs, versioning of documents, the ability to organize into folders and categorize and search using meta-tags.

In addition the document management features are fully integrated into the rest of the system, so that documents attached to other artifacts (e.g. requirements, test cases, etc.) are automatically connected to the project documentation repository.

### 10.1. Document List

When you click Project Home > Documents on the global navigation bar, you will initially be taken to the project documents list screen illustrated below:

The screenshot displays the SpiraTeam interface for document management. At the top, there is a navigation bar with the SpiraTeam logo, a search bar, and tabs for 'Planning', 'Testing', 'Tracking', and 'Reporting'. Below this, there are tabs for 'Requirements', 'Planning Board', 'Releases', and 'Documents'. The 'Documents' tab is selected. The main content area is divided into three sections:

- Left-hand pane (Folders):** A hierarchical list of folders. The 'Design Documents' folder is selected and expanded, showing sub-folders like 'CreateNewAuthor', 'CreateNewBook', 'EditExistingAuthor', 'Misc Documents', 'Screen Captures', 'Specifications', 'Test Results', and 'Test Scripts'.
- Central pane (Document List):** A table displaying 5 documents in the 'Design Documents' folder. The table has columns for 'Filename', 'Type', 'Size', 'Edited By', 'Edited On', 'Author', 'ID', and 'Edit'.

Filename	Type	Size	Edited By	Edited On	Author	ID	Edit
Sequence Diagram for Book Mgt.pdf	UML Diagram	35 KB	Joe P Smith	9-May-2006	Fred Bloggs	DC.7	Edit
Graphical Design Mockups.psd	Screen Layout	1009 KB	Joe P Smith	30-Apr-2006	Joe P Smith	DC.13	Edit
Use Case Diagram.vsd	UML Diagram	43 KB	Fred Bloggs	22-Apr-2006	Fred Bloggs	DC.12	Edit
Author Management Screen Wireframe.vsd	Screen Layout	533 KB	Fred Bloggs	1-Apr-2006	Joe P Smith	DC.8	Edit
Book Management Screen Wireframe.ai	Screen Layout	392 KB	Fred Bloggs	31-Mar-2006	Joe P Smith	DC.11	Edit
- Bottom-left pane (Tag Cloud):** A list of tags associated with documents in the project. The tags are 'book', 'management', 'error', 'functional', 'specification', and 'libraries'. The size of the font is proportional to the number of documents associated with each tag.

This screen consists of three main sections:

- The top left-hand pane displays a hierarchical list of the various folders that have been setup for the current project. Clicking on the triangle icon will expand the child folders and clicking on the name of the folder will display the list of documents in the folder in the main pane to the right.
- The main right-hand pane displays a list of all the documents contained within the currently selected folder. This list can be filtered and sorted, and you can choose how many rows of documents to display on the page at one time.
- The bottom left-hand pane contains the “Tag Cloud”. This is a list of all the tag names associated with documents in the project. The size of the font is proportional to the number of documents

associated with the tag. Clicking on a tag name will automatically filter the list of documents to find items that contain the selected tag.

The main toolbar contains icons for all the operations that can be performed on the document list. You can add documents to the current folder, delete existing documents from the project, refresh the list of documents, export documents to another project, apply a filter, and clear the current filter. In addition there is the option to either display just the documents in the current folder or all documents in all folders. The latter is useful when you want to search for a specific document by keyword or tag name.

### 10.1.1. Add New Document

To attach a new document to the incident, you need to first click the “**Add New**” button to display the new attachment dialog box:

The image shows three instances of the 'Add New Document' dialog box, each with a different document type selected. The first instance has 'File' selected, showing a 'Filename' field with a 'Choose File' button and 'No file chosen' text. The second instance has 'URL' selected, showing a 'URL' field. The third instance has 'Screenshot' selected, showing a 'Screenshot' field with a placeholder image and a note: 'Please paste your image using the CTRL+V keyboard command.' All three instances have 'Description', 'Document Type' (set to 'Functional Specification'), 'Document Folder' (set to 'Root Folder'), and 'Tags' fields, along with 'Upload' and 'Cancel' buttons.

There are three different types of item that can be attached to an incident:

- To upload a file, choose “File” as the type and then click the Browse button and select the file from your local computer, optionally enter a detailed description then click the “**Upload**” button. The document will be copied from your computer and attached to the artifact.
- To attach a web-link (URL) to the artifact, you need to choose “URL” as the type and then enter the fully qualified URL (e.g. <http://mywebsite.com?Document=1>), an optional description and then click the “**Upload**” button to attach the web-link.
- To attach a screenshot to the artifact, you need to choose “Screenshot” as the type and then copy the image to your computer’s clipboard (e.g. on Windows computers, the PRINT SCREEN button captures the current page and adds to the clipboard). Once the image is in the clipboard, paste it into the editor using CTRL+V (or the equivalent keystroke for your operating system) and the item will appear in the preview window. You can then fill in the other fields and click “**Upload**” to attach the image.

Note: If you are using a non-Windows® computer (e.g. Macintosh®) that doesn't put file extensions on filenames (e.g. .xls for an Excel sheet) automatically, then you will need to manually add the file extension to the filename before uploading if you want it to be displayed with the correct icon in the attachment list.

### 10.1.2. View Document Information

When you hover the mouse pointer over any of the documents displayed in the document list, an information panel will be displayed that contains the name, description, version, document type and meta-tags of the document:

The screenshot shows a document management interface. At the top, there are buttons for '+ Add Document', 'Refresh', 'Items in Current Folder', 'Filter', 'Tools', and '-- Show/hide columns --'. Below this is a status bar indicating 'Displaying 1 - 5 out of 5 document(s) in the current folder Design Documents'. The main area is a table with columns: Filename, Type, Size, Edited By, Edited On, Author, ID, and Edit. The table contains five rows of document information. A popup window titled 'Sequence Diagram for Book Mgt.pdf' is overlaid on the table, showing detailed information for the selected document:

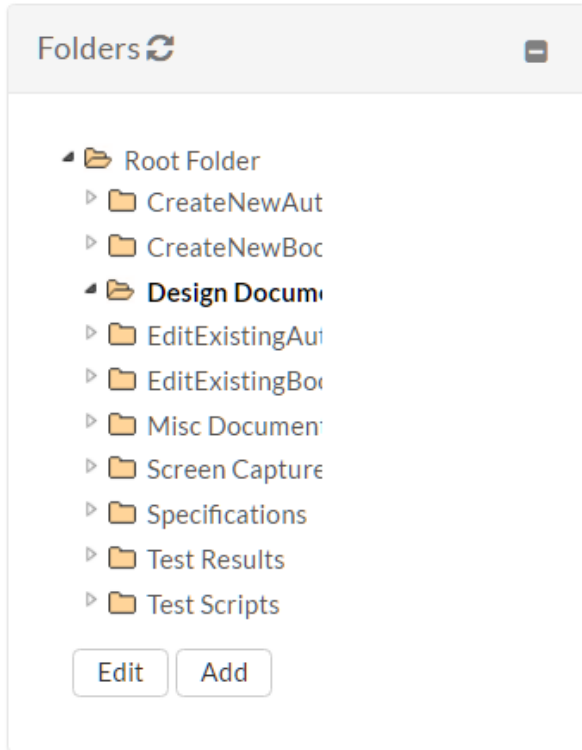
- Filename: [Sequence Diagram for Book Mgt.pdf](#)
- Document Type: UML Diagram
- File Type: PDF
- Description: Sequence diagram in UML format that provides additional detail surrounding the book management use-case / test case 1.2
- Version: 1.2
- Tags:
- Created By: Fred Bloggs 5/2/2006 8:00:00 PM
- Edited By: Joe P Smith 5/9/2006 8:00:00 PM
- ID: [DC:000007]

The popup also includes 'View Details' and 'Cancel' buttons.

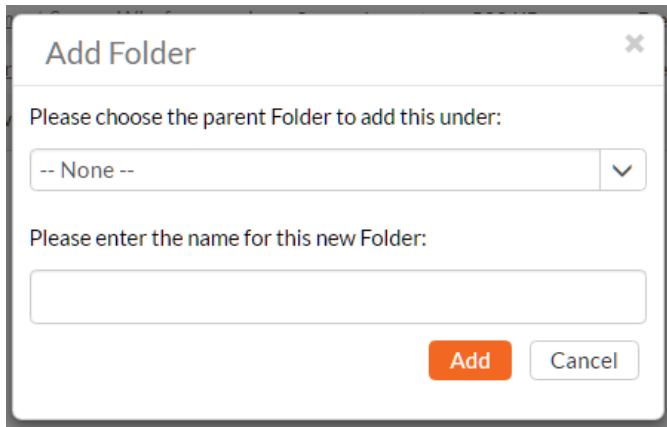
You can click on the document URL to actually open the document itself in a new window, click on the meta-tag links to find related documents that contain the same meta-tag, or click on "[View Details](#)" to see more information regarding the document, including an ability to edit its meta-information and see the different versions of the document.

### 10.1.3. Edit Document Folders

If you are a project administrator, you will see the "Edit" and "Add" buttons beneath the folder tree:

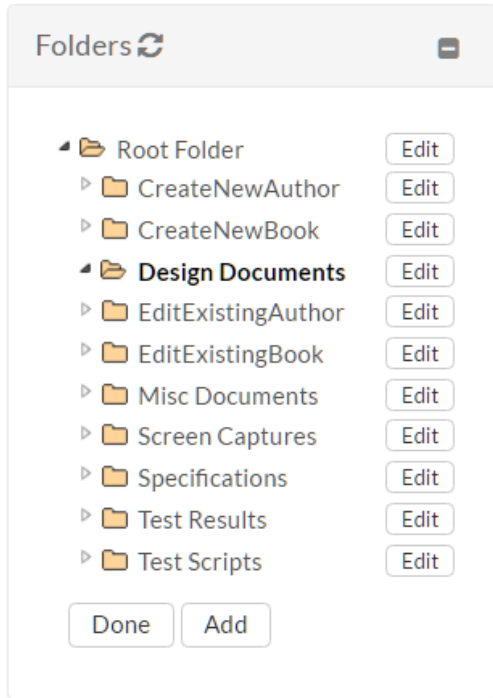


This lets you add, edit and delete task folders in the project. To add a new folder, click the “**Add**” button:

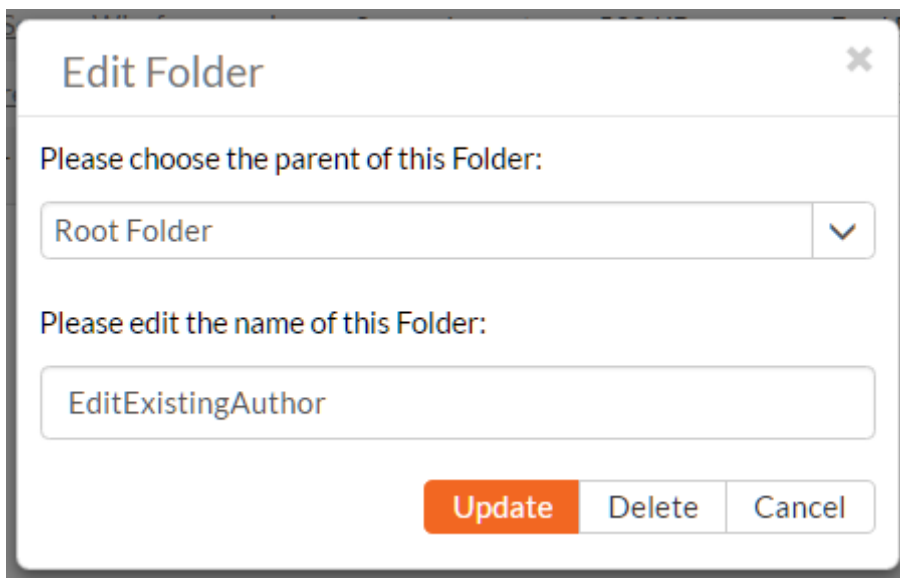


Choose the parent folder that you want to add the new folder under (or None if you are adding a new top-level folder) from the dropdown list and then enter the name of the new folder. Then click ‘Add’ save the new folder.

To edit or delete an existing folder, click the ‘Edit’ button to switch the folder tree to edit mode:



To edit or delete a specific folder, click on the 'Edit' button next to the folder:



You can change the parent folder and/or name of the folder and click "**Update**" to commit the change or click "**Delete**" to delete the folder entirely (including its contents).

## 10.2. Document Details

When you click on an item in the document list described above, you are taken to the document details page illustrated below:

The screenshot shows a document details page for 'Sequence Diagram for Book Mgt.pdf'. The interface is divided into several sections:

- Left Pane:** A navigation pane showing a folder structure. The 'Design Documents' folder is expanded, and 'Sequence Diagram for Book Mgt.pdf' is selected. Other items include 'Graphical Design Mockups...', 'Use Case Diagram.vsd', 'Author Management Screenshot', and 'Book Management Screen ...'.
- Top Bar:** Contains a toolbar with 'Save', 'Delete', 'Refresh', 'Email', and 'Subscribe' buttons. The document title 'Sequence Diagram for Book Mgt.pdf' and a 'Document [DC:7]' label are also present.
- Info Bar:** A shaded bar at the top of the right pane containing the document's name and a download icon.
- Properties Section:** A tabbed interface with three tabs: 'People', 'Properties', and 'Dates and Times'.
  - People:** Lists 'Creator' as Fred Bloggs and 'Edited By' as Joe P Smith.
  - Properties:** Lists 'File Type (Size)' as PDF (35 KB), 'Document Folder' as Design Documents, 'Document Type' as UML Diagram, 'Current Version' as 12, 'Tags' as 'sequence diagram, book ...', 'Classification' as '--- Please Select ---', and 'Notes'.
  - Dates and Times:** Lists 'Creation Date' as 5/2/2006 8:00:00 PM and 'Last Edited' as 5/9/2006 8:00:00 PM.
- Detailed Information Section:** A large text area containing the text: 'Sequence diagram in UML format that provides additional detail surrounding the book management use-case / test case'.
- Bottom Bar:** Contains a 'Show 15 rows' dropdown and a set of tabs: 'Preview', 'Versions', 'Associations', and 'History'.

This page is made up of *three* areas;

1. the left pane displays the documents list navigation;
2. the right pane's header, which displays: the operations toolbar; the editable name of the selected document; and the info bar (with a shaded background), which also contains the workflow status transitions (see below); and
3. the right pane's tabbed interface with rich information related to the document, including, where available, a preview of the document, the list of document versions, the list of artifacts that the document is associated with, and history of changes made to the document).

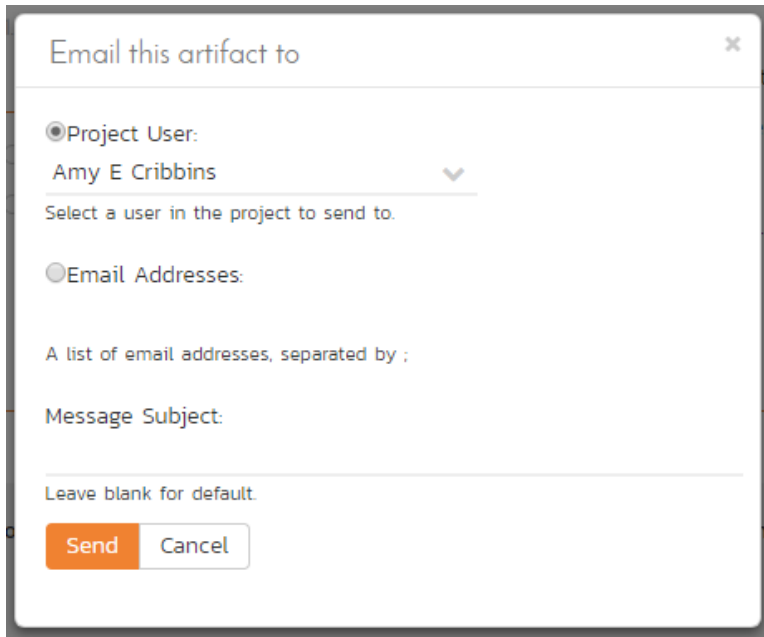
Please note that on smaller screen sizes the navigation pane is not displayed. While the navigation pane has a link to take you back to the documents list, on mobile devices a 'back' button is shown on the left of the operations toolbar.

The navigation pane can be collapsed by clicking on the "-" button, or expanded by clicking anywhere on the gray title area. On desktops the user can also control the exact width of the navigation pane by dragging and dropping a red handle that appears on hovering at the rightmost edge of the navigation pane.

The navigation pane consists of a link that will take you back to the project document list, as well as a list of other documents in the current folder. This latter list is useful as a navigation shortcut; you can quickly

view the detailed information of all the peer documents by clicking on the navigation links without having to first return to the main document list page.

Using the **Email** button on the toolbar, you can send an email containing details of the requirement to an email address or another user on the system:



You can specify the subject line for the email, and either a list of email addresses, separated by semicolons, or an existing project user. The content of the email is specified in the System Administration – Notification Templates.

To be notified of any changes made to the current artifact via email, click the **Subscribe** button. If you already subscribed, the button will instead let you **Unsubscribe** to stop receiving emails about that particular artifact. Depending on your role, you may also see a dropdown arrow to the right of this button. This will let you subscribe others in the project to this artifact.

The top part of the main pane allows you to view and/or edit the details of the particular document. You can edit the various fields (name, description, etc.) and once you are satisfied with them, click one of the **Save** buttons to commit the changes. In addition, you can delete the current document by choosing **Delete**, or discard any changes made by clicking **Refresh**.

The lower part of the main pane can be switched between four different views by clicking the appropriate tab. Initially the pane will be in “Versions” mode. The functionality in each of these views is described below.

### 10.2.1. Preview

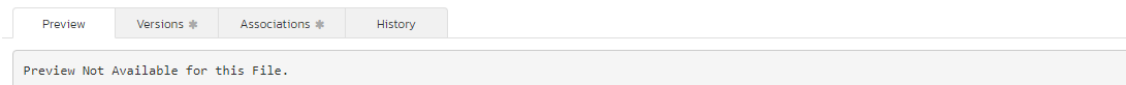
This tab displays a preview of the currently active version of the document. Previews are shown for a number of file types, notably plain text or code files, and images.



The screenshot shows a software interface with four tabs: 'Preview \*', 'Versions \*', 'Associations', and 'History'. The 'Preview \*' tab is active and displays a code editor with the following JavaScript code:

```
1 function TestInit()
2 {
3     //Input variables - allows SpiraTest to configure as parameters
4     //Provide backup values if not defined
5     if ('undefined' == typeof(g_author_age))
6     {
7         g_author_age = 35;
8     }
9     if ('undefined' == typeof(g_author_name))
10    {
11        g_author_name = 'Roger Hammersmith';
12    }
13
14    Tester.SetReportAttribute("Browser", g_browserLibrary);
15    KillBrowser();
16 }
17
18
19 //##### Script Steps #####
20
21 function Test()
22 {
23     var author_id = 2;
24     Login();
25     EditAuthor(author_id, g_author_name, g_author_age);
26     Logout();
27 }
28
29 g_load_libraries=["%g_browserLibrary:Internet Explorer HTML%"];
```

If a format cannot be previewed (for example a PDF or Microsoft Word document), the following message is displayed:



### 10.2.2. Document Versions

This view displays the list of different versions that exist for the current document. When you initially create a new document there will be only a single version (e.g. v1.0), however as revisions are made to the document, rather than having to create a whole new document, you can just upload the new revision as a new version (e.g. v1.1) and it will be added to the list of versions.

Each version in the list is displayed with its name, a description of what changed in the version, the version number assigned to the revision, the file-size, who uploaded the new version and a link to actually open the new version:



Active	Filename	Version	Version Comments	Size	Author	Upload Date	Operations
<input checked="" type="checkbox"/>	Sequence Diagram for Book Mgt.pdf	12	Sequence diagram in UML format that provides additional detail surrounding the book management use-case / test case	35 KB	Fred Bloggs	10-May-2006	
<input type="checkbox"/>	Sequence Diagram for Book Mgt.pdf	11	Sequence diagram in UML format that provides additional detail surrounding the book management use-case / test case	30 KB	Fred Bloggs	5-May-2006	<input type="button" value="Make Active"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Sequence Diagram for Book Mgt.pdf	10	Sequence diagram in UML format that provides additional detail surrounding the book management use-case / test case	28 KB	Joe P Smith	3-May-2006	<input type="button" value="Make Active"/> <input type="button" value="Delete"/>

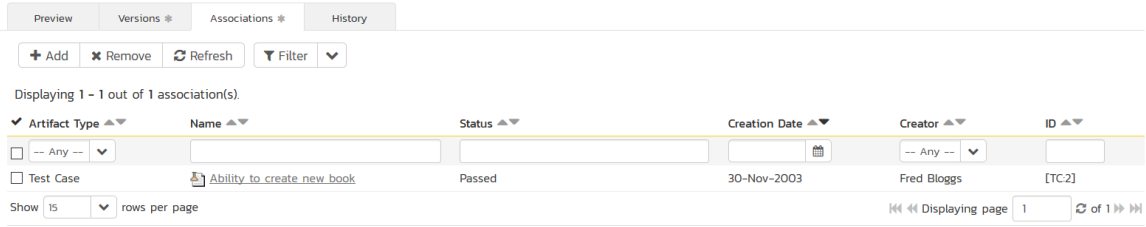
On this page, you have the option to delete an existing version, make a different version the active one (the one that users see when they view the document list and click on the link) and upload a new revision. To upload a new version, click on the 'Upload New Version' hyperlink:

In the popup dialog, you need to drag the file to be uploaded onto the upload icon (or click on the icon to browse to the file), enter a description of the changes made, a new version number and whether the new version should be made the active one, then click the [Upload] button to confirm the changes.

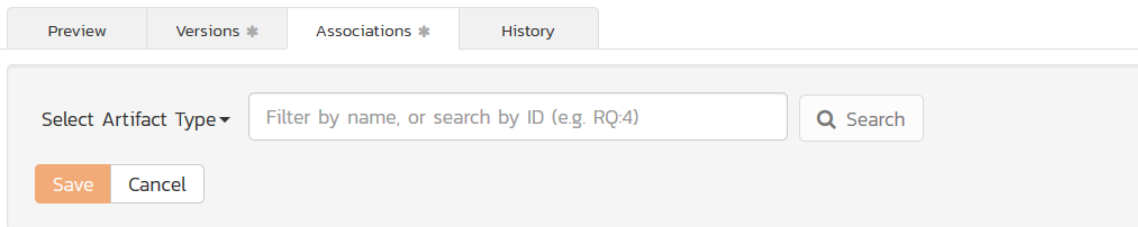
Note: This option is only available for File attachments. To change a URL attachment, you can simply edit the Filename field directly.

### 10.2.3. Document Associations

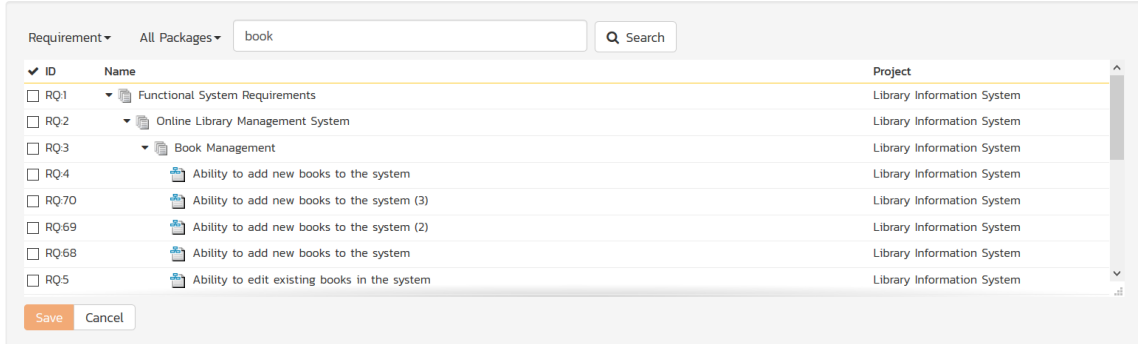
This view displays a list of the artifacts in the current project that are associated with the current document. If you originally uploaded the document as an attachment to a requirement, test case, etc. then an initial association will be already listed, otherwise it will be empty.



From this screen you can either remove an existing artifact association or add a new association from the current document to a pre-existing artifact in the system. To add the association, click on the **Add** button in the toolbar:



Then, you need to select the type of artifact being associated (requirement, test case, incident, etc.) and then enter in the name or ID (with the artifact prefix) of the artifact to search on:



Once you have selected the items you want to associate, simply click the 'Save' button to associate them with the current document.

#### 10.2.4. History

This tab displays the list of changes that have been performed on the document since its creation.

[Preview \\*](#)
[Versions \\*](#)
[Associations](#)
[History](#)

[Refresh](#)
[Filter](#)
[Admin View](#)

Displaying 1 - 0 out of 0 change(s).

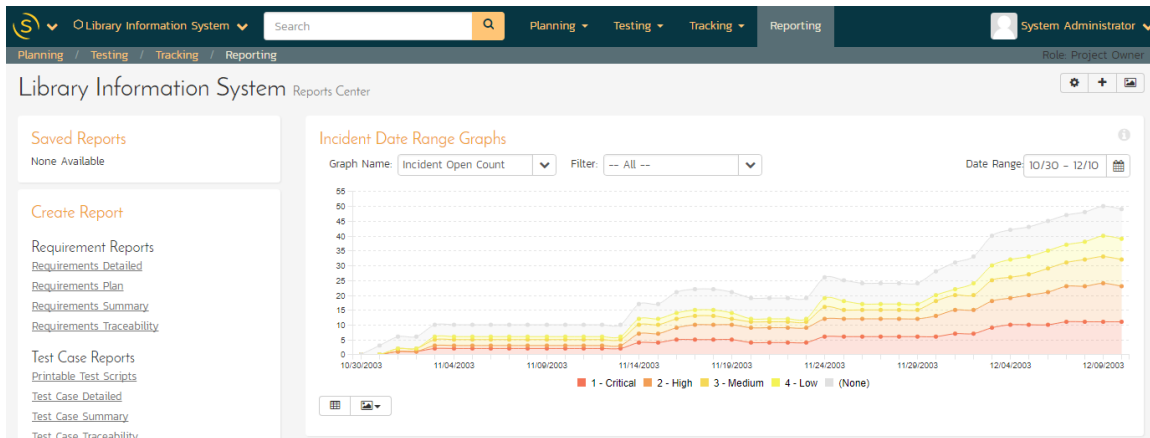
Change ID ▲▼	Change Date ▲▼	Field Name ▲▼	Old Value ▲▼	New Value ▲▼	Changed By ▲▼	Change Type ▲▼
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-- Any --	-- Any --

Show  rows per page
 
 ⏪ ⏩ Displaying page  of 1 ⏪ ⏩

The change history displays the date that each change was made, together with the fields that were changed, the old and new values and the person who made the change. This allows a complete audit trail to be maintained of all changes in the system. In addition, if you are logged in as a project administrator you can also click on the “Admin View” hyperlink to revert any unwanted changes.

## 11. Reports Center

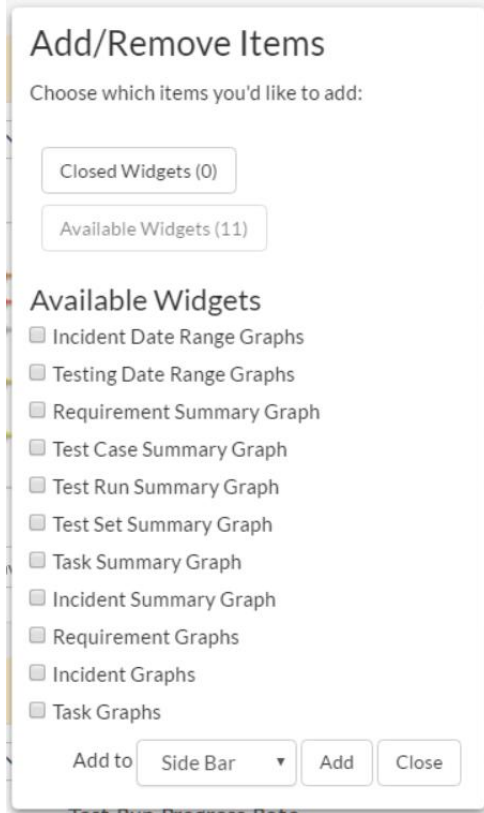
This section describes the reporting features of SpiraTeam®, including an overview of each of the report types that are available. When you click on the “Reports” tab on the global navigation bar, you will initially be taken to the reports home page illustrated below:



This page consists of three main areas:

- The top left-hand pane displays a list of any reports that have either been saved by the currently logged in user, or those reports created by other members of the project, that have been marked (by that user) as ‘shareable’.
- The bottom left-hand main pane displays a list of the printable reports available in the system, categorized by the artifact they primarily relate to (requirements, test cases, incidents and releases). Clicking on any of the report hyperlinks will take you to the configuration page for the report in question (see section 11.1 below for details).
- The right-hand pane is a dashboard that contains the set of graph widgets configured by the current user. By default the dashboard will display: the Incident Progress Rate, Test Run Progress Rate, Requirement Summary, Test Case Summary, Incident Aging and Task Burndown.

In addition to the graphs displayed by default, you can click on the “[Add Items](#)” buttons to add additional graphs to the reporting dashboard:



Each of the graphs is described in more detail in sections 11.7 – 11.9.

### *11.1. Reports Configuration*

The configuration page for each report differs slightly, but the general format is illustrated below (please note all sections are shown in orange text with a line beneath and are shown here in the collapsed state – click the orange text to expand the section):

## Requirements Detailed Report

Please choose from the various options below to specify how you would like this report to appear. You can filter the results displayed by various parameters as well as choose which elements of the report are displayed.

Report Format	+
Report Elements	+
Standard Field Filters	+
Custom Property Filters	+

If you would like to save this report for future use, please give it a name below before clicking the [Create Report] button:

Report Name:

I would like to share this report with other members of the project

You can configure the reports in the following ways:

- **Report Format** – This allows you to specify the display format of the report. Depending on the specific report, they can be displayed as a web-page (HTML), downloaded as a Microsoft Word document, downloaded as a Microsoft Excel spreadsheet or downloaded as a Microsoft Project file. In addition there is a raw-XML format that allows you to export the underlying report data into any external reporting system that supports XML import.

Report Format ×

Format:  Adobe Acrobat 

HTML 

MS-Word 2003+ 

MS-Word 2007+ 

XML 

- **Report Elements** – This allows you to determine which types of information to include in the report. This varies by report type, but includes the dependent items related to the artifact being reported on (attachments, test steps, coverage, history, etc.)

## Report Elements



---

- Requirements Details:
- Artifact Change History
  - Associated Tasks
  - Linked Incidents
  - Linked Requirements
  - List of Attached Documents
  - Source Code
  - Test Case Coverage

- **Standard Field Filters** – This allows you to constrain the range of data being reported on, based on the various fields associated with the artifact in question. These filters are typically selections from multi-valued-dropdown lists and date-ranges.

### Standard Field Filters

---

Author:	<input type="text" value="-- All --"/>	▼
Component:	<input type="text" value="-- All --"/>	▼
Importance:	<input type="text" value="-- All --"/>	▼
Owner:	<input type="text" value="-- All --"/>	▼
Status:	<input type="text" value="-- All --"/>	▼
Type:	<input type="text" value="-- All --"/>	▼
Creation Date:	<input type="text"/>	
Last Updated:	<input type="text"/>	
ID:	<input type="text"/>	
Progress:	<input type="text" value="-- All --"/>	▼
Test Coverage:	<input type="text" value="-- All --"/>	▼
Name:	<input type="text"/>	

- **Custom Property Filters** – This allows you to constrain the range of data being reported on, based on the custom fields associated with the artifact by your project administrator. These filters can be either freetext or drop-down lists.

#### Custom Property Filters



URL:

Difficulty:

Classification:

Notes:

Review Date:

Ranking:

Decimal:

- **Sort Options** - This option is only available for the non-hierarchical data reports (i.e. for test cases, test sets, test runs, incidents and tasks) and allows you to specify the sort order of the results returned in the report. For the hierarchical-data based reports the sort order is always the order of the hierarchy.

Sort Field:

Sort Ascending

- **Report Name** – If you would like to save the report configuration so that you can quickly re-run it at a later date, you just need to enter a name for the report and indicate (by selecting the checkbox or not) whether you want this report to be private or shared by all members of the project.

If you would like to save this report for future use, please give it a name below before clicking the [Create Report] button:

Report Name:

I would like to share this report with other members of the project

Once you have selected the format, elements and filters, clicking the “[Create Report](#)” button launches the report in a new window. Each of the reports is described in sections 11.2 – 11.6 below:



## 11.2. Requirement Reports

### 11.2.1. Requirements Summary Report

This report displays all of the requirements defined for the current project in the order they appear in the requirements list. The requirement's details and coverage status are displayed in a summary list form:

[Print Report](#)

#### Requirements Summary Report

This report displays all of the requirements defined for the current project in the order they appear in the requirements list. The requirement's details and coverage status are displayed in a summary list form.

#### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

Req #	Name	Description	Priority	Status	Author	Owner	Creation Date	Test Coverage	Task Progress	Last Modified	Release #	Planned Effort	Task Effort	Actual Effort	URL
1	Functional System Requirements			In Progress	Fred Bloggs		01-Dec-2003	0 Covering, 0 Failed, 0 Passed, 0 Blocked, 0 Caution	42 Tasks; 60% On Schedule, 6% Running Late, 4% Starting Late, 29% Not Started	01-Dec-2003		145 hours 0 mins	190 hours 0 mins	188 hours 40 mins	
2	Online Library Management System			In Progress	Fred Bloggs		01-Dec-2003	0 Covering, 0 Failed, 0 Passed, 0 Blocked, 0 Caution	42 Tasks; 60% On Schedule, 6% Running Late, 4% Starting Late, 29% Not Started	01-Dec-2003		145 hours 0 mins	190 hours 0 mins	188 hours 40 mins	

### 11.2.2. Requirements Detailed Report

This printable report displays all of the requirements defined for the current project in the order they appear in the requirements list. For each individual requirement, the name, priority, author, status and coverage status are displayed, along with tables containing the list of covering test cases, linked incidents/requirements, associated tasks, attached documents, and the change history:

#### Req #4 - Ability to add new books to the system

The ability to add new books into the system, complete with ISBN, publisher and other related information

<b>Priority:</b>	1 - Critical	<b>Status:</b>	Completed
<b>Author:</b>	Fred Bloggs	<b>Creation Date:</b>	01-Dec-2003
<b>Coverage:</b>	3 Covering, 1 Failed, 1 Passed 0 Blocked 0 Caution	<b>Last Modified:</b>	01-Dec-2003
<b>Owner:</b>	Joe P Smith	<b>Planned Effort:</b>	15 hours 0 mins
<b>Release #:</b>	1.0.0.0	<b>Task Est. Effort:</b>	16 hours 0 mins
		<b>Task Actual Effort:</b>	15 hours 30 mins

**URL:** <http://www.libraries.org>

**Difficulty:** Moderate

**Requirement Type:**

**Test Coverage:**

Test #	Name	Status	Est. Duration	Last Execution Date
TC2	Ability to create new book	Failed	0 hours 10 mins	04-Dec-2003
TC8	Book management	Passed	0 hours 4 mins	01-Dec-2003
TC13	Adding new book and author to library	Not Run	-	--

**Linked Requirements**

Name	Created By	Comment	Date	Req Id
Ability to delete existing books in the system	Fred Bloggs	These two requirements are related	12-Mar-2004	RQ6

**Associated Incidents**

Name	Created By	Comment	Date	Inc Id
Cannot install system on Oracle 9i	Fred Bloggs	This bug affects the requirement	14-Mar-2004	IN5
Cannot add a new book to the system	Joe P Smith	Test Run: Ability to create new book	04-Nov-2003	IN7

**Associated Tasks:**

### 11.2.3. Requirements Plan

This report displays a complete work breakdown structure of the project from a requirements perspective, including all requirements and tasks organized by schedule:

Requirements Plan Report												
This report displays a complete work breakdown structure of the project, including all requirements and tasks organized by schedule.												
Project 1: Library Information System												
Sample application that allows users to manage books, authors and lending records for a typical branch library												
ID #	Name	Type	Status	Priority	Owner	Start Date	End Date	Release #	% Complete	Plan Effort	Est. Effort	Actual Effort
1	Functional System Requirements	Requirement	In Progress							145 hours 0 mins	190 hours 0 mins	188 hours 40 mins
2	Online Library Management System	Requirement	In Progress							145 hours 0 mins	190 hours 0 mins	188 hours 40 mins
3	Book Management	Requirement	Completed	1 - Critical						90 hours 0 mins	96 hours 0 mins	95 hours 0 mins
4	Ability to add new books to the system	Requirement	Completed	1 - Critical	Joe P Smith			1.0.0.0		15 hours 0 mins	16 hours 0 mins	15 hours 30 mins
1	Develop new book entry screen	Task	Completed	1 - Critical	Fred Bloggs	01-Mar-2004	02-Mar-2004	1.0.0.0.0001	100 %		8 hours 0 mins	7 hours 20 mins
2	Create book object insert method	Task	Completed	1 - Critical	Fred Bloggs	01-Mar-2004	02-Mar-2004	1.0.0.0.0001	100 %		5 hours 0 mins	5 hours 0 mins
3	Write book object insert queries	Task	Completed	1 - Critical	Fred Bloggs	01-Mar-2004	02-Mar-2004	1.0.0.0.0001	100 %		3 hours 0 mins	2 hours 50 mins
5	Ability to edit existing books in the system	Requirement	Completed	1 - Critical	Joe P Smith			1.0.0.0		15 hours 0 mins	16 hours 0 mins	16 hours 50 mins
4	Develop edit book details screen	Task	Completed	1 - Critical	Fred Bloggs	03-Mar-2004	04-Mar-2004	1.0.0.0.0001	100 %		8 hours 0 mins	7 hours 20 mins
5	Create book object update method	Task	Completed	1 - Critical	Joe P Smith	03-Mar-2004	04-Mar-2004	1.0.0.0.0001	100 %		5 hours 0 mins	6 hours 0 mins
6	Write book object update queries	Task	Completed	1 - Critical	Joe P Smith	03-Mar-2004	04-Mar-2004	1.0.0.0.0001	100 %		3 hours 0 mins	3 hours 30 mins
6	Ability to delete existing books in the system	Requirement	Completed	1 - Critical	Fred Bloggs			1.0.0.0		14 hours 0 mins	16 hours 0 mins	15 hours 10 mins

### 11.2.4. Requirements Traceability Matrix

This report displays a matrix of the requirements in the system with their list of covering test cases and associated, mapped requirements:

Project 1: Library Information System							
Sample application that allows users to manage books, authors and lending records for a typical branch library							
Requirements Forward Traceability							
This section displays a list of all the requirements with the associated test cases/requirements.							
Req #	Name	Importance	Status	Release #	Test Traceability	Requirements Traceability	
RQ1	Functional System Requirements		In Progress				
RQ2	Online Library Management System		In Progress				
RQ3	Book Management	1 - Critical	Completed				
RQ4	Ability to add new books to the system	1 - Critical	Completed	1.0.0.0	TC2, TC8, TC13	RQ6	
RQ5	Ability to edit existing books in the system	1 - Critical	Completed	1.0.0.0	TC3, TC8	RQ7	
RQ6	Ability to delete existing books in the system	1 - Critical	Completed	1.0.0.0	TC8, TC12	RQ4	
RQ7	Ability to associate books with different subjects	1 - Critical	Completed	1.1.0.0	TC4, TC8	RQ5	
RQ8	Ability to associate books with different authors	1 - Critical	Completed	1.1.0.0	TC6, TC13		
RQ9	Ability to associate books with different editions	1 - Critical	Completed	1.1.0.0	TC4, TC8, TC12		
RQ10	Ability to completely erase all books stored in the system with one click	1 - Critical	Completed	1.2.0.0	TC4, TC8, TC12		
RQ11	Edition Management	1 - Critical	In Progress				
RQ12	Ability to create different editions	1 - Critical	In Progress	1.0.0.0			

## 11.3. Test Case Reports

### 11.3.1. Test Case Summary Report

This report displays all of the test cases defined for the current project in the order they appear in the test case list. The test case's details and execution status are displayed in a summary grid form with the test steps optionally displayed:

### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

Test # Name	Description	Priority	Test Step	Test Step Description	Test Step Expected Result	Test Step Sample Data	Status	Author	Owner	Est. Duration	Created On	Last Modified
1	Functional Tests						N/A	Fred Bloggs	Fred Bloggs		01-Dec-2003	13-Oct-2009 15:07:47
2	Ability to create new book	Tests that the user can create a new book in the system	1 - Critical				Failed	Fred Bloggs	Fred Bloggs	10	01-Dec-2003	13-Oct-2009 15:07:47
			1	Call Login to Application			Not Run					
			2	User clicks link to create book	User taken to first screen in wizard		Not Run					
			3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	Not Run					
			4	User chooses book's genre and sub-genre from list	User sees screen displaying all entered information	Play, Tragedy	Not Run					
			5	User clicks submit button	Confirmation screen is displayed		Not Run					

### 11.3.2. Test Case Detailed Report

This report displays all of the test cases defined for the current project in the order they appear in the test case list. The test case's details and execution status are displayed, along with sub-tables containing the list of test steps, test runs, attached documents, the change history, and a list of any associated open incidents:

Step	Description	Expected Result	Sample Data	Last Status
1	Call Login to Application			Not Run
2	User clicks link to create book	User taken to first screen in wizard		Not Run
3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	Not Run
4	User chooses book's genre and sub-genre from list	User sees screen displaying all entered information	Play, Tragedy	Not Run
5	User clicks submit button	Confirmation screen is displayed		Not Run

Run #	Tester	Test Set	Release	Version	Status	Est. Duration	Actual Duration	Execution Date
TR18	Fred Bloggs		Iteration 003	1.1.0.0.0003	Failed	2 mins	70 mins	04-Dec-2003
TR15	Joe P Smith		Iteration 002	1.1.0.0.0002	Passed	2 mins	70 mins	03-Dec-2003
TR13	Fred Bloggs		Iteration 001	1.1.0.0.0001	Passed	2 mins	70 mins	02-Dec-2003
TR12	Fred Bloggs		Library System Release 1	1.0.0.0	Failed	10 mins	70 mins	01-Dec-2003
TR2	Fred Bloggs	Testing Cycle for Release 1.1	Library System Release 1 SP1	1.0.1.0	Passed	10 mins	90 mins	01-Dec-2003
TR1	Joe P Smith	Testing Cycle for Release 1.0	Library System Release 1	1.0.0.0	Failed	10 mins	75 mins	01-Dec-2003

Req #	Name	Status	Priority
RQ4	Ability to add new books to the system	Completed	1 - Critical

### 11.3.3. Test Set Summary Report

This report displays all of the test sets defined for the current project in the order they appear in the test set list. The test set's details and execution status are displayed in a summary list form:

### Test Set Summary Report

This report displays all of the test sets defined for the current project in the order they appear in the test set list. The test set's details and execution status are displayed in a summary list form.

#### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

Test Set #	Name	Description	Status	Release	Creator	Owner	Created On	Planned Date	Last Modified	Last Executed	# Passed	# Failed	# Caution	# Blocked	# Not Run	Notes
TX8	Functional Test Sets		In Progress		Fred Bloggs		02-Jan-2007	05-Feb-2007	13-Oct-2009	--	0	0	0	0	0	
TX1	Testing Cycle for Release 1.0	This tests the functionality introduced in release 1.0 of the library system	In Progress	1.0.0.0	Fred Bloggs	Joe P Smith	02-Jan-2007	05-Feb-2007	13-Oct-2009	01-Dec-2003	1	2	0	0	4	
TX2	Testing Cycle for Release 1.1	This tests the functionality introduced in release 2.0 of the library system	Not Started	1.1.0.0	Fred Bloggs	Joe P Smith	03-Jan-2007	07-Feb-2007	13-Oct-2009	01-Dec-2003	3	0	0	0	6	

### 11.3.4. Test Set Detailed Report

This report displays all of the test sets defined for the current project in the order they appear in the test set list. The test set's details and execution status are displayed, along with sub-tables containing the list of test cases, test runs, attached documents, and the change history:

#### Test Set #1 - Testing Cycle for Release 1.0

This tests the functionality introduced in release 1.0 of the library system

Owner: Joe P Smith  
 Release: 1.0.0.0  
 Status: In Progress  
 Planned Date: 05-Feb-2007

Creator: Fred Bloggs  
 Creation Date: 02-Jan-2007  
 Last Execution: 01-Dec-2003  
 Last Updated: 13-Oct-2009

Notes:  
 Operating System:

#### Test Cases:

Test #	Name	Priority	Est. Duration	Status	Last Execution Date
TC2	Ability to create new book	1 - Critical	10 mins	Failed	01-Dec-2003
TC3	Ability to edit existing book	1 - Critical	5 mins	Passed	01-Dec-2003
TC4	Ability to create new author	1 - Critical	8 mins	Failed	01-Dec-2003
TC5	Ability to edit existing author	2 - High	5 mins	Not Run	--
TC6	Ability to reassign book to different author	2 - High	8 mins	Not Run	--
TC8	Book management	2 - High	4 mins	Not Run	--
TC9	Author management	2 - High	4 mins	Not Run	--

#### Test Runs:

Run #	Tester	Release	Version	Status	Est. Duration	Actual Duration	Execution Date
TR4	Joe P Smith	Library System Release 1	1.0.0.0	Failed	8 mins	90 mins	01-Dec-2003
TR3	Fred Bloggs	Library System Release 1	1.0.0.0	Passed	5 mins	90 mins	01-Dec-2003
TR1	Joe P Smith	Library System Release 1	1.0.0.0	Failed	10 mins	75 mins	01-Dec-2003

### 11.3.5. Printable Test Scripts

This printable report is useful when you want to be able to conduct the testing activities offline on paper, or when testers need paper copies of the test script in addition to using the online test execution wizard.

In either case, this report simply displays all of the test cases defined for the current project in the order they appear in the test case list together with their detailed test steps and a list of any attached documents.

### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

#### Test #2 - Ability to create new book

Tests that the user can create a new book in the system

##### Test Steps:

Step	Description	Expected Result	Sample Data	Status	Actual Result
1	User opens up browser and enters application URL: http://www.libraryinformationsystem.com/beta	The browser loads the login web page	http://www.libraryinformationsystem.com/beta	<input type="checkbox"/> Passed <input type="checkbox"/> Failed <input type="checkbox"/> Blocked <input type="checkbox"/> Caution	
2	User logs in to application	User taken to main menu screen	Login=librarian, Password=password1	<input type="checkbox"/> Passed <input type="checkbox"/> Failed <input type="checkbox"/> Blocked <input type="checkbox"/> Caution	
2	User clicks link to create book	User taken to first screen in wizard		<input type="checkbox"/> Passed <input type="checkbox"/> Failed <input type="checkbox"/> Blocked <input type="checkbox"/> Caution	
3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	<input type="checkbox"/> Passed <input type="checkbox"/> Failed <input type="checkbox"/> Blocked <input type="checkbox"/> Caution	
4	User chooses book's genre and sub-genre from list	User sees screen displaying all entered information	Play, Tragedy	<input type="checkbox"/> Passed <input type="checkbox"/> Failed <input type="checkbox"/> Blocked <input type="checkbox"/> Caution	
5	User clicks submit button	Confirmation screen is displayed		<input type="checkbox"/> Passed <input type="checkbox"/> Failed <input type="checkbox"/> Blocked <input type="checkbox"/> Caution	

##### File Attachments:

Filename	Description	Author	Date Uploaded
Sequence Diagram for Book Mgt.pdf	Sequence diagram in UML format that provides additional detail surrounding the book management use-case / test case	Fred Bloggs	03-May-2006

### 11.3.6. Test Run Summary Report

This report displays all of the test runs defined for the current project. The test run's details and execution status are displayed in a summary grid form:

Test Run Summary Report																
This report displays all of the test runs defined for the current project in date order (most recent first). The test run's details and execution status are displayed in a summary list form.																
Project 1: Library Information System																
Sample application that allows users to manage books, authors and lending records for a typical branch library																
Test Run #	Name	Test Case #	Release	Test Set	Type	Tester	Est. Duration	Actual Duration	Start Date	End Date	Status	Runner	Message	Notes	Web Browser	Operating System
TR10	Ability to edit existing book	TC3	1.0.0.0		Manual	Fred Bloggs	0 hours 5 mins	0 hours 50 mins	01-Dec-2003	01-Dec-2003	Caution					
TR12	Ability to create new book	TC2	1.0.0.0		Automated	Fred Bloggs	0 hours 10 mins	1 hours 10 mins	01-Dec-2003	01-Dec-2003	Failed	NUnit	Expected 1 but 2 was found		Opera	Windows 2003
TR13	Ability to create new book	TC2	1.1.0.0.0001		Automated	Fred Bloggs	0 hours 2 mins	1 hours 10 mins	02-Dec-2003	02-Dec-2003	Passed	JUnit	Expected 1 but 2 was found			
TR14	Ability to edit existing book	TC3	1.1.0.0.0001		Automated	Fred Bloggs	0 hours 5 mins	1 hours 10 mins	02-Dec-2003	02-Dec-2003	Passed	JUnit	Expected 1 but 2 was found			

### 11.3.7. Test Run Detailed Report

This report displays all of the test runs defined for the current project in date order (most recent first). The test run's details and execution status are displayed, along with sub-tables containing the list of test run steps, and a list of any associated open incidents:

**Test Run #1 - Ability to create new book**  
 Tests that the user can create a new book in the system

<b>Test Case #:</b> TC2	<b>Status:</b> Failed
<b>Release #:</b> 1.0.0.0	<b>Execution Date:</b> 01-Dec-2003
<b>Tester:</b> Joe P Smith	<b>Test Set:</b> Testing Cycle for Release 1.0
<b>Type:</b> Manual	<b>Actual Duration:</b> 1 hours 15 mins
<b>Est. Duration:</b> 0 hours 10 mins	

**Notes:**  
**Web Browser:** Internet Explorer  
**Operating System:** Windows XP

Step	Description	Expected Result	Sample Data	ActualResult	Status
1	User logs in to application	User taken to main menu screen			Passed
2	User clicks link to create book	User taken to first screen in wizard			Passed
3	User enters books name and author, then clicks Next	User taken to next screen in wizard	Macbeth, William Shakespeare	An error page is displayed - "No such object or with block variable at line 473"	Failed

**Associated Incidents:**

Inc #	Type	Status	Priority	Severity	Name	Owned By	Detected On
7	Bug	Assigned	1 - Critical	3 - Medium	Cannot add a new book to the system	Joe P Smith	04-Nov-2003

**File Attachments:**

Filename	Description	Author	Date Uploaded
Error Logging-in Screen-shot.gif	Captured screen-shot of the error that was raised when attempting to log in to the library application	Fred Bloggs	24-Apr-2006

### 11.3.8. Test Case Traceability

This report displays a matrix of the test cases in the system with the list of mapped releases, incidents and test sets:

[Print Report](#)

**Test Case Traceability Matrix**  
 This report displays a matrix of the test cases in the system with the list of mapped releases, incidents and test sets.

**Test Case Forward Traceability**  
 This section displays a list of all the test cases with the associated releases, incidents and test sets.

Test #	Name	Priority	Releases	Test Sets	Incidents
TC1	Functional Tests				
TC2	Ability to create new book	1 - Critical	RL1, RL2, RL3, RL4, RL17, RL18, RL19	TX1, TX2	IN7
TC3	Ability to edit existing book	1 - Critical	RL1, RL2, RL3, RL4, RL17, RL18, RL19, RL6	TX1, TX2	
TC4	Ability to create new author	1 - Critical	RL1, RL2, RL3, RL4, RL5, RL18, RL19, RL6	TX1, TX2, TX5	IN2
TC5	Ability to edit existing author	2 - High	RL1, RL2, RL3, RL4, RL5, RL19, RL6	TX1, TX2	
TC6	Ability to reassign book to different author	2 - High	RL1, RL2, RL3, RL4, RL5, RL6	TX1, TX2, TX5	
TC7	Regression Tests				
TC8	Book management	2 - High	RL1, RL2, RL3, RL4, RL5	TX1, TX2, TX3, TX4	
TC9	Author management	2 - High	RL1, RL2, RL3, RL4, RL5, RL6	TX1, TX2, TX3, TX4	
TC10	Scenario Tests				
TC11	Exception Scenario Tests	3 - Medium			
TC12	Person loses book and needs to report loss	3 - Medium	RL4, RL5, RL6	TX2, TX5, TX6	
TC13	Adding new book and author to library	3 - Medium	RL4, RL5, RL6	TX2, TX5, TX6	
TC15	Common Tests				
TC16	Open Up Web Browser				
TC17	Login to Application				
TC18	New Test Case (Ability to add new books to the system)				
TC19	New Test Case (Ability to edit existing books in the system)				
TC20	New Test Case (Ability to delete existing books in the system)				

## 11.4. Incident Reports

### 11.4.1. Incident Summary Report

This report displays all of the incidents tracked for the current project. The incident's details are displayed in a summary list form:

### Incident Summary Report

This report displays all of the incidents tracked for the current project. The incident's details are displayed in a summary list form.

#### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

Inc #	Name	Description	Resolution	Type	Status	Priority	Severity	Detected By	Owned By	Detected On	Last Modified	Closed On	Detected Release	Resolved Release
1	Cannot log into the application	When trying to log into the application with a valid username and password, the system throws a fatal exception		Incident	New			Fred Bloggs		01-Nov-2003	01-Dec-2003	--	1.0.0.0	1.0.1.0
2	Not able to add new author	When I try and click on the button to add a new author the system simply displays the main screen and does nothing		Incident	New			Joe P Smith		01-Nov-2003	01-Dec-2003	--	1.0.0.0	1.0.1.0
3	Clicking on link throws fatal error	When I click on the logout link, instead of logging out, I get an ASP session not valid error		Incident	New			Fred Bloggs		01-Nov-2003	01-Dec-2003	--	1.0.1.0	1.0.2.0

### 11.4.2. Incident Detailed Report

This printable report displays all of the incidents tracked for the current project sorted by incident number. For each individual incident, the name, type, priority, status, opener, owner and close date are displayed, along with tables containing the detailed description and resolutions as well as a tabular list of attached documents, linked requirements/incidents and the change history:

#### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

##### Inc #1 - Cannot log into the application

When trying to log into the application with a valid username and password, the system throws a fatal exception

Type:	Incident	Priority:	
Status:	New	Severity:	
Opened By:	Fred Bloggs	Opened On:	01-Nov-2003
Assigned To:		Last Modified:	01-Dec-2003
Detected In Release:	1.0.0.0	Closed On:	--
Resolved In Release:	1.0.1.0	Verified In Release:	1.0.1.0

##### Notes:

Operating System:

##### Associations:

Artifact Type	Name	Created By	Comment	Date	Artifact Id
Test Run	Sample Test	Fred Bloggs	Test Run: Sample Test	01-Nov-2006	TR 9
Incident	The book listing screen doesn't sort	Joe P Smith	This incident and bug are related	16-Mar-2004	IN 6
Requirement	Ability to create new users in the system	Joe P Smith	Test Run: Sample Test	01-Dec-2003	RQ 26

##### File Attachments:

Filename	Description	Author	Date Uploaded
Bug Stack Trace.txt		Joe P Smith	04-May-2006
Error Logging-in Screen-shot.gif	Captured screen-shot of the error that was raised when attempting to log in to the library application	Fred Bloggs	24-Apr-2006

## 11.5. Task Reports

### 11.5.1. Task Summary Report

This report displays all of the tasks tracked for the current project. The task's details are displayed in a summary list form:

Project 1: Library Information System														
Sample application that allows users to manage books, authors and lending records for a typical branch library														
Task #	Name	Description	Status	Priority	Owned By	Created On	Last Modified	Release #	Requirement #	Start Date	End Date	% Complete	Est. Effort	Actual Effort
23	Write edition object insert queries		Not Started	1 - Critical	Fred Bloggs	01-Dec-2003	01-Dec-2003	1.0.0.0.0003	RQ12	11-Mar-2004	12-Mar-2004	0%	3 hours 0 mins	-
24	Develop edit author details screen		Not Started	2 - High	Joe P Smith	01-Dec-2003	01-Dec-2003	1.0.0.0.0002	RQ15	07-Mar-2004	08-Mar-2004	0%	8 hours 0 mins	-
25	Create author object update method		Not Started	2 - High	Joe P Smith	01-Dec-2003	01-Dec-2003	1.0.0.0.0002	RQ15	07-Mar-2004	08-Mar-2004	0%	5 hours 0 mins	-
26	Write author object update queries		Not Started	2 - High	Joe P Smith	01-Dec-2003	01-Dec-2003	1.0.0.0.0002	RQ15	07-Mar-2004	08-Mar-2004	0%	3 hours 0 mins	-
27	Refactor author screen to include delete button		Not Started	2 - High	Fred Bloggs	01-Dec-2003	01-Dec-2003	1.0.0.0.0003	RQ16	09-Mar-2004	10-Mar-2004	0%	6 hours 0 mins	-

### 11.5.2. Task Detailed Report

This report displays all of the tasks tracked for the current project. The task's details are displayed, along with a tabular list of attached documents and the change history:

Task Detailed Report	
This report displays all of the tasks tracked for the current project. The task's details are displayed, along with a tabular list of attached documents and the change history.	
Project 1: Library Information System	
Sample application that allows users to manage books, authors and lending records for a typical branch library	
Task #23 - Write edition object insert queries	
Requirement ID:	RQ 12
Release #:	1.0.0.0.0003
Assigned To:	Fred Bloggs
Start Date:	11-Mar-2004
End Date:	12-Mar-2004
% Complete:	0%
Status:	Not Started
Priority:	1 - Critical
Created On:	01-Dec-2003
Last Modified:	01-Dec-2003
Estimated Effort:	3 hours 0 mins
Actual Effort:	-

## 11.6. Release Reports

### 11.6.1. Release Summary Report

This report displays all of the releases and iterations defined for the current project in the order they appear in the release/iteration hierarchy. The release's details are displayed in a summary list form:



## Release Summary Report

This report displays all of the releases and iterations defined for the current project in the order they appear in the release/iteration hierarchy. The release's details are displayed in a summary list form.

### Project 1: Library Information System

Sample application that allows users to manage books, authors and lending records for a typical branch library

Rel #	Name	Version Number	Description	General						Testing Information					Task Progress	Planned Effort
				Creator	Creation Date	Iteration	Active	Start Date	End Date	# Failed	# Passed	# Blocked	# Caution	# Not Run		
1	Library System Release 1	1.0.0.0	This is the initial release of the Library Management System	Fred Bloggs	15-Feb-2004	N	Y	01-Mar-2004	12-Mar-2004	2	0	0	1	4	18 Tasks; 50% On Schedule, 12% Running Late, 9% Starting Late, 26% Not Started	216 hours 0 mins
2	Library System Release 1 SP1	1.0.1.0	This service pack fixes identified bugs and a small security vulnerability	Joe P Smith	05-May-2004	N	Y	13-Mar-2004	30-Mar-2004	0	3	1	0	3	0 Tasks; 0% On Schedule, 0% Running Late, 0% Starting Late, 0% Not Started	176 hours 0 mins

## 11.6.2. Release Detailed Report

This report displays all of the releases and iterations defined for the current project in the order they appear in the release/iteration hierarchy. The release's details are displayed, along with sub-tables containing the list of requirements added, mapped test cases, test runs executed, incidents resolved, attached documents, scheduled tasks and the change history:

1.1.0.0 - Library System Release 1.1			
This version adds additional reporting functionality to the 1.0 version			
Version #:	1.1.0.0		
Creator:	Fred Bloggs		
Start Date:	15-Oct-2004		
End Date:	27-Oct-2004		
# Resources:	3		
Non-Working Days:	6		
Notes:			
Operating System:			
Active:	Y		
Creation Date:	15-Oct-2004		
Planned Effort:	168 hours 0 mins		
Available Effort:	82 hours 0 mins		
Task Est. Effort:	86 hours 0 mins		
Actual Effort:	85 hours 40 mins		
<b>Requirements Added:</b>			
Req #	Name	Status	Priority
RQ1	Functional System Requirements	In Progress	
RQ2	Online Library Management System	In Progress	
RQ3	Book Management	Completed	1 - Critical
RQ7	Ability to associate books with different subjects	Completed	1 - Critical
RQ8	Ability to associate books with different authors	Completed	1 - Critical
RQ9	Ability to associate books with different editions	Completed	1 - Critical
RQ13	Author Management	In Progress	2 - High
RQ17	Ability to link authors to their contact information	Requested	2 - High
<b>Mapped Test Cases:</b>			
Test #	Name	Status	Last Execution Date
TC4	Ability to create new author	Failed	01-Dec-2003
TC2	Ability to create new book	Failed	04-Dec-2003
TC5	Ability to edit existing author	Blocked	01-Dec-2003

## 11.6.3. Release Plan Report

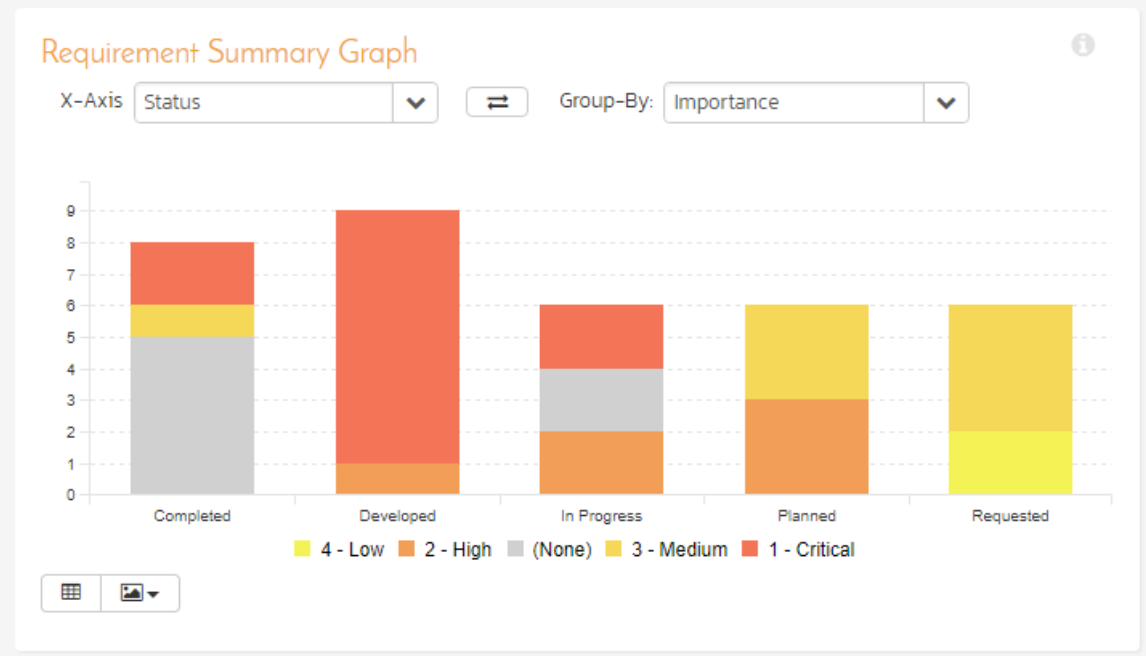
This report displays a complete work breakdown structure of the project from a release perspective, including all releases, iterations, requirements, tasks and incidents organized by schedule:

ID #	Name	Type	Status	Priority	Owner	Start Date	End Date	% Complete	Plan Effort	Est. Effort	Actual Effort
RL1	1.0.0.0 - Library System Release 1	Release				01-Mar-2004	12-Mar-2004		216 hours 0 mins	94 hours 0 mins	93 hours 30 mins
RQ4	Ability to add new books to the system	Requirement	Completed	1 - Critical	Joe P Smith				15 hours 0 mins	16 hours 0 mins	15 hours 30 mins
RQ5	Ability to edit existing books in the system	Requirement	Completed	1 - Critical	Joe P Smith				15 hours 0 mins	16 hours 0 mins	16 hours 50 mins
RQ6	Ability to delete existing books in the system	Requirement	Completed	1 - Critical	Fred Bloggs				14 hours 0 mins	16 hours 0 mins	15 hours 10 mins
RQ12	Ability to create different editions	Requirement	In Progress	1 - Critical	Fred Bloggs				-	16 hours 0 mins	16 hours 0 mins
RQ15	Ability to edit existing authors in the system	Requirement	Planned	2 - High	Fred Bloggs				15 hours 0 mins	16 hours 0 mins	16 hours 0 mins
RQ16	Ability to delete existing authors in the system	Requirement	In Progress	2 - High	Fred Bloggs				10 hours 0 mins	14 hours 0 mins	14 hours 0 mins
RL2	1.0.1.0 - Library System Release 1 SP1	Release				13-Mar-2004	30-Mar-2004		176 hours 0 mins	-	-
IN1	Cannot log into the application	Incident	New			--	--	0 %		-	-
IN2	Not able to add new author	Incident	New			--	--	0 %		-	-
IN7	Cannot add a new book to the system	Bug	Assigned	1 - Critical	Joe P Smith	06-Nov-2003	--	25 %		0 hours 20 mins	-
RL11	1.0.1.0.0001 - Iteration 001	Iteration				13-Mar-2004	20-Mar-2004		80 hours 0 mins	-	-
RL12	1.0.1.0.0002 - Iteration 002	Iteration				21-Mar-2004	24-Mar-2004		48 hours 0 mins	-	-
RL13	1.0.1.0.0003 - Iteration 003	Iteration				25-Mar-2004	30-Mar-2004		64 hours 0 mins	-	-
RL3	1.0.2.0 - Library System Release 1 SP2	Release				01-Apr-	30-Apr-		352 hours 0		

### 11.7. Summary Graphs

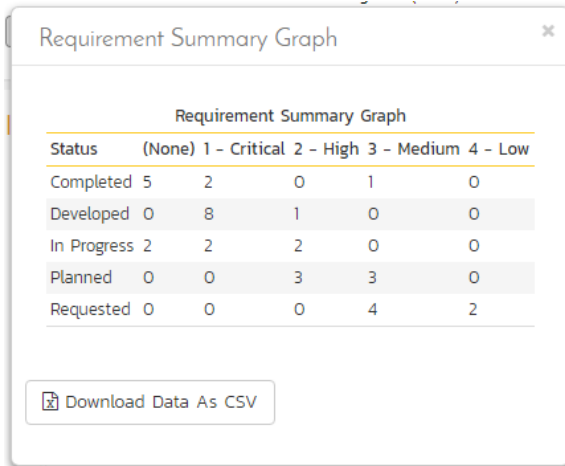
#### 11.7.1. Requirements Summary Graph

The requirements summary graph shows how many requirements are currently in a project. The number of requirements is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the requirement information which is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



In this version of the report, the x-axis represents the requirements' status, and the individual bars are grouped by requirement importance. Each data-value can be viewed by positioning the mouse pointer over the bar, and a "tooltip" will pop-up listing the actual data value.

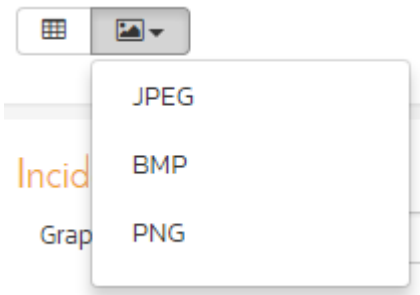
Clicking on the "**Display Data Grid**" button will display the underlying data that is being used to generate the graph:



Status	(None)	1 - Critical	2 - High	3 - Medium	4 - Low
Completed	5	2	0	1	0
Developed	0	8	1	0	0
In Progress	2	2	2	0	0
Planned	0	0	3	3	0
Requested	0	0	0	4	2

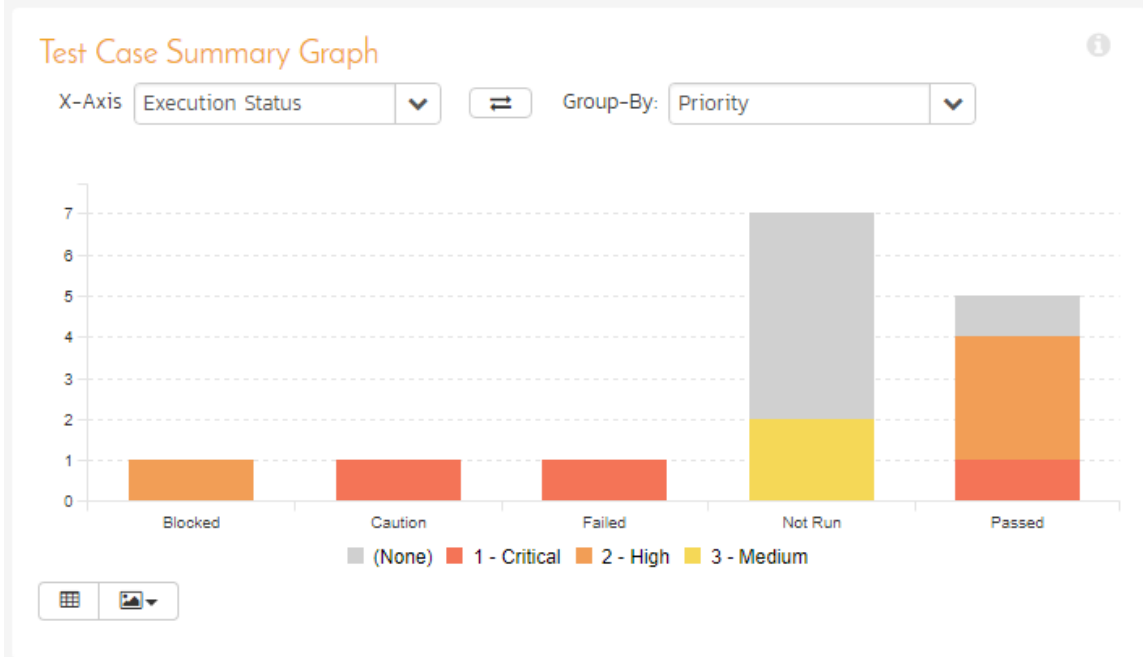
Download Data As CSV

Clicking on the "**Download Data as CSV**" button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).



### 11.7.2. Test Case Summary Graph

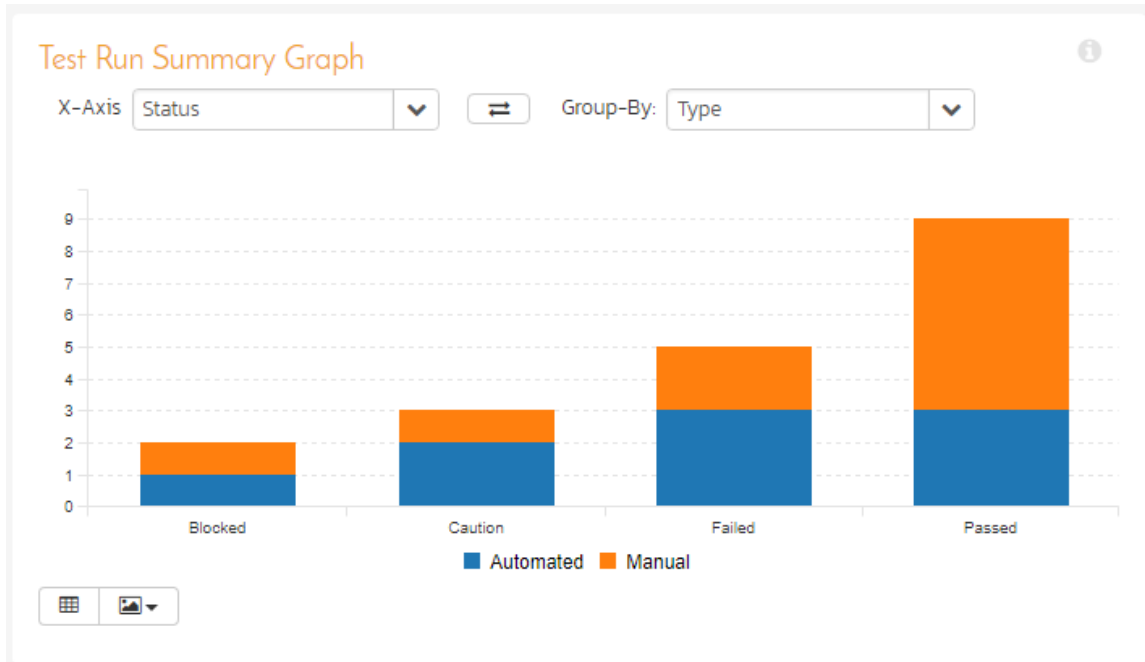
The test case summary graph shows how many test cases are currently in a project. The number of test cases is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the test case information which is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



In this version of the report, the x-axis represents the test case execution status, and the individual bars are grouped by test case priority. Each data-value can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.7.3. Test Run Summary Graph

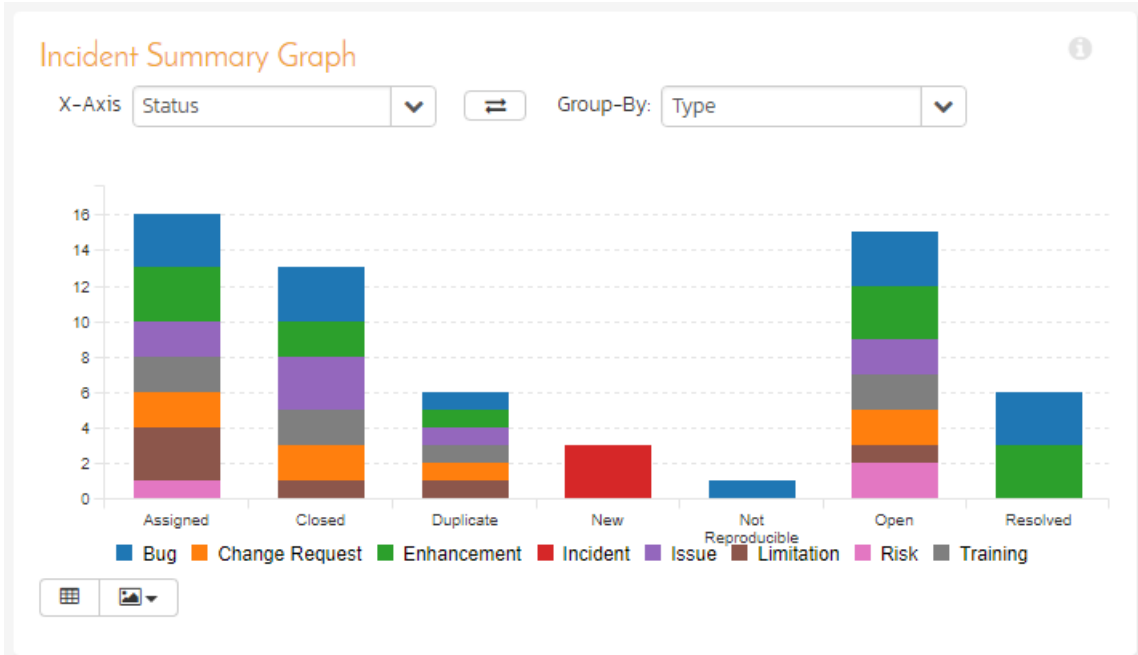
The test run summary graph shows how many test runs are currently in a project. The number of test runs is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the test run information which is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



In this version of the report, the x-axis represents the test run execution status, and the individual bars are grouped by test run type. Each data-value can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

#### 11.7.4. Incident Summary Graph

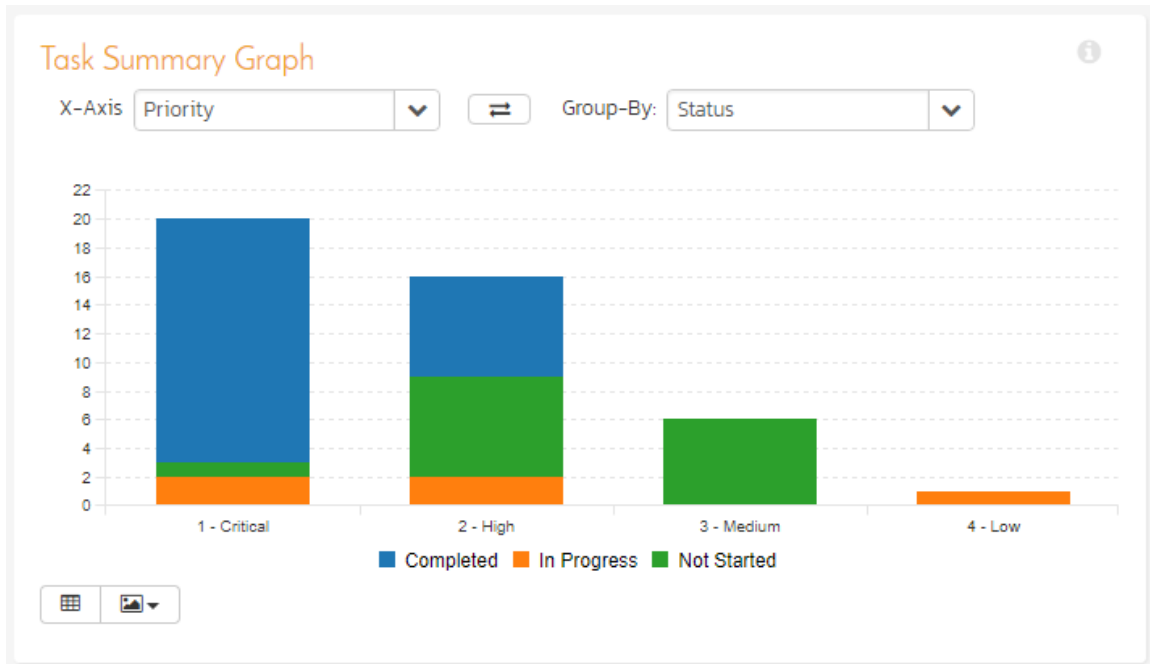
The incident summary graph shows how many incidents are currently in a project. The number of incidents is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the incident information which is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



In this version of the report, the x-axis represents the incidents' status, and the individual bars are grouped by the type of incident. Each data-value can be viewed by positioning the mouse pointer over the bar, and a "tooltip" will pop-up listing the actual data value. Clicking on the "[Display Data Grid](#)" button will display the underlying data that is being used to generate the graph. In addition, clicking on the "[Download Data as CSV](#)" button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.7.5. Task Summary Chart

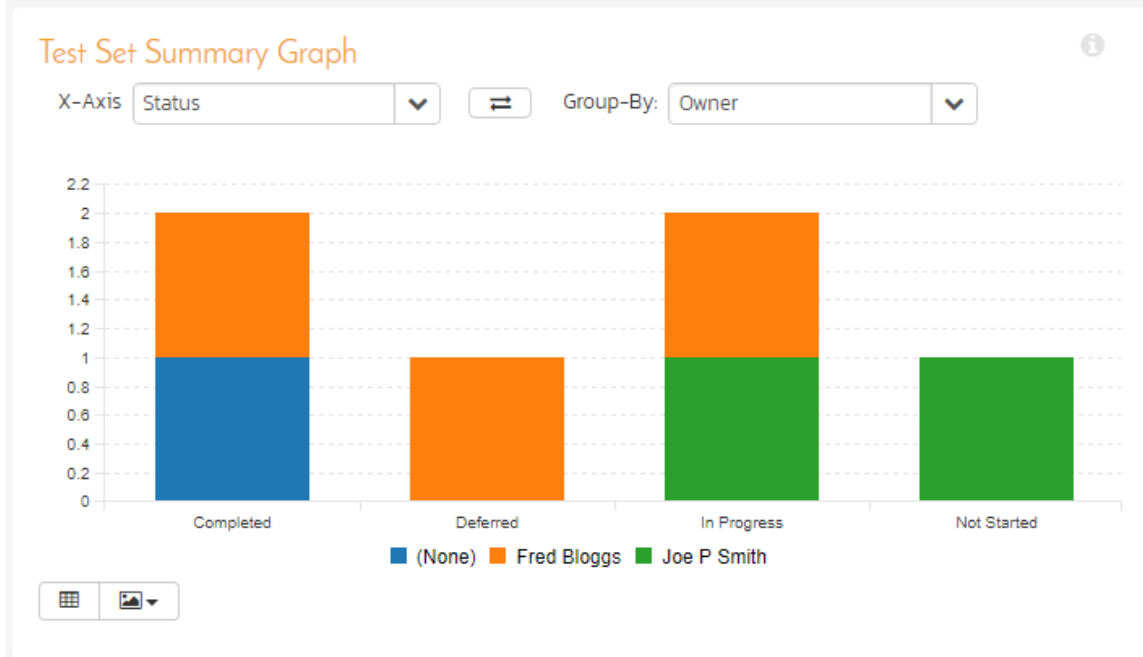
The task summary graph shows how many tasks are currently in a project. The number of tasks is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the task information which is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



In this version of the report, the x-axis represents the tasks' priority, and the individual bars are grouped by the status of task. Each data-value can be viewed by positioning the mouse pointer over the bar, and a "tooltip" will pop-up listing the actual data value. Clicking on the "[Display Data Grid](#)" button will display the underlying data that is being used to generate the graph. In addition, clicking on the "[Download Data as CSV](#)" button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

#### 11.7.6. Test Set Summary Graph

The test set summary graph shows how many test set are currently in a project. The number of test sets is displayed according to the criteria that you specify. You can specify the type of data displayed along the x-axis, and the test set information which is used to group the data. When you first open the graph you will be asked to pick the field that you would like to display on the x-axis and the field that you would like to group the data by. Once you have chosen the appropriate fields the graph will be displayed:



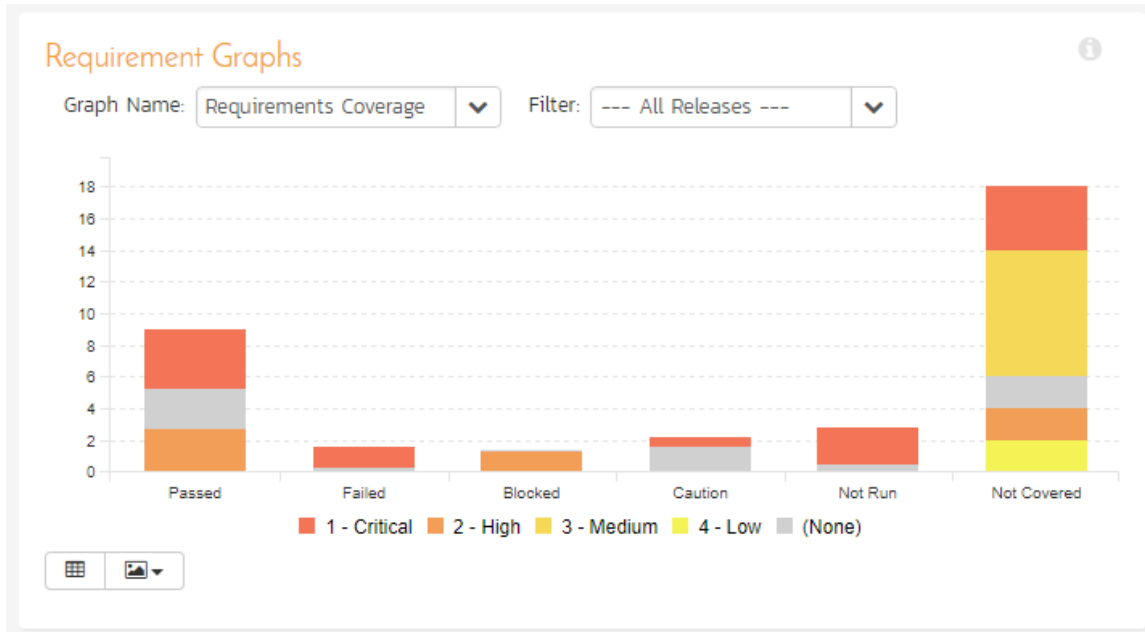
In this version of the report, the x-axis represents the test set status, and the individual bars are grouped by the name of the tester (owner). Each data-value can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

## 11.8. Snapshot Graphs

### 11.8.1. Requirements Coverage Graph

The requirements coverage graph shows how many requirements are currently in a project, according to their test coverage status.



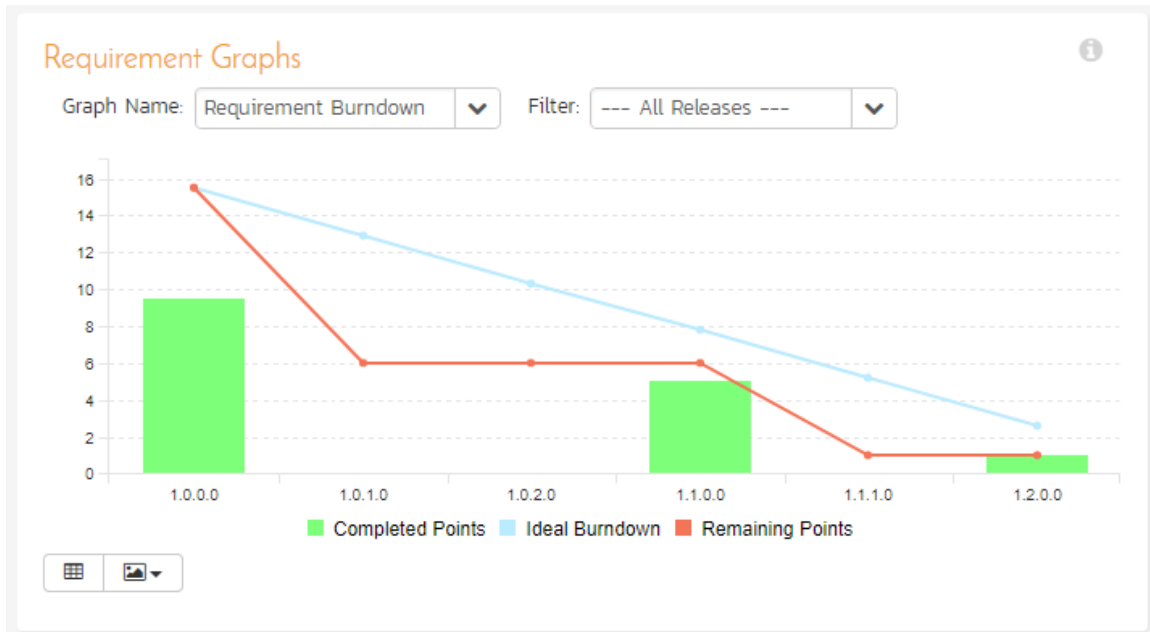


The x-axis of the report represents the various test execution statuses that a requirement can have as its coverage status (plus the Not-Covered status), and the individual bars are grouped by the requirements importance. Each data-value can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. You can also filter the graph to just display data for a specific release/iteration as well as for the project as a whole. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.8.2. Requirements Burndown Graph

The Requirements Burndown graph shows the remaining number of story points that needs to be completed for each release/iteration in the project with separate lines for the estimated and ideal burndown. In addition, the graph includes bars for the completed number of story points in each time period on the x-axis:



The y-axis of the graph displays the total remaining number of story points that needs to be done (the actual burndown), with a blue line indicating the ideal burndown. In addition, there are bars displayed at each interval of the x-axis that shows the completed number of story points for that interval.

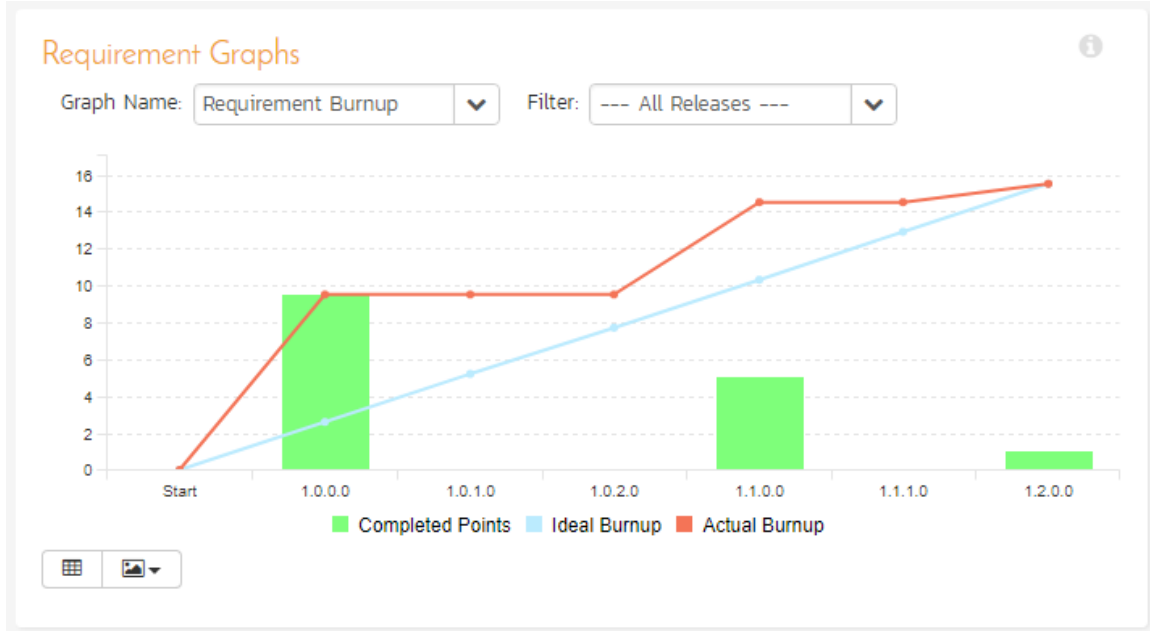
The x-axis can be configured to display three different levels of granularity:

- **All Releases** – This shows the total remaining number of story points that needs to be done for each of the releases in the project
- **Specific Release** – This shows the total remaining number of story points that needs to be done for each of the iterations in the selected release
- **Specific Iteration** – This shows the total remaining number of story points that needs to be done for each working day in the date-range covered by the selected iteration.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.8.3. Requirements Burnup Graph

The Requirements Burnup graph shows the cumulative number of story points outstanding for each release/iteration in the project with separate lines for the estimated and ideal burnup. In addition, the graph includes bars for the number of completed story points in each time period on the x-axis.



The y-axis of the graph displays the cumulative increase in number of story points for the project (the actual burnup), with a blue line indicating the ideal burnup. In addition, there are bars displayed at each interval of the x-axis that shows the number of completed story points for that interval.

The x-axis can be configured to display three different levels of granularity:

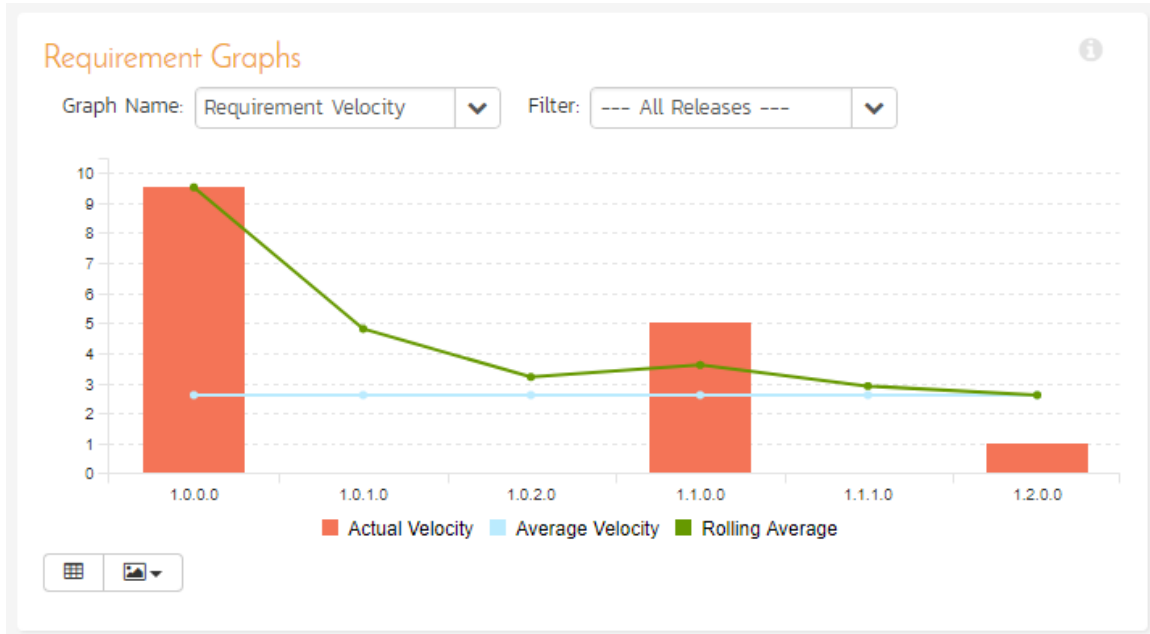
- **All Releases** – This shows the increase in number of story points for each of the releases in the project
- **Specific Release** – This shows the increase in number of story points for each of the iterations in the selected release
- **Specific Iteration** – This shows the increase in number of story points for each working day in the date-range covered by the selected iteration.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

#### 11.8.4. Requirements Velocity Graph

The Requirements Velocity graph shows the total number of story points that have been completed (or planned to be completed) in a particular release, iteration or time-period (called the velocity). The actual

velocity is displayed along with the overall average velocity (in blue) and the rolling average velocity (in green):



The y-axis of the graph displays the total number of story points, and the x-axis can be configured to display three different levels of granularity:

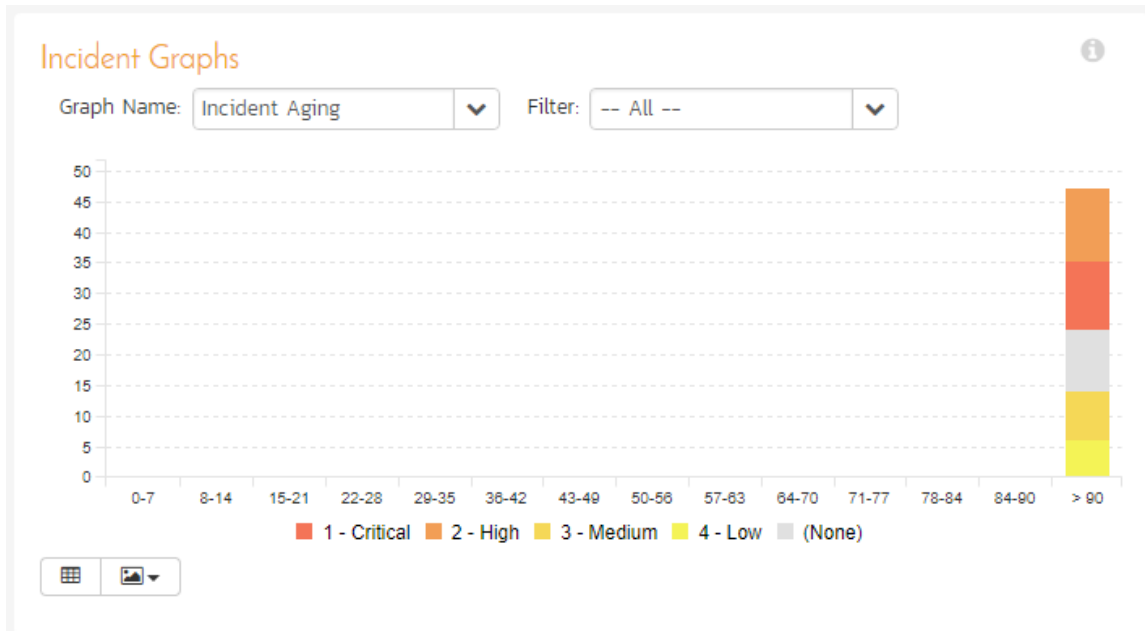
- **All Releases** – This shows the total number of story points for each of the releases in the project
- **Specific Release** – This shows the total number of story points for each of the iterations in the selected release
- **Specific Iteration** – This shows the total number of story points for each working day in the date-range covered by the selected iteration.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.8.5. Incident Aging Graph

The incident aging chart displays the number of days incidents have been left open in the system. The chart is organized as a stacked histogram, with the count of incidents on the y-axis and different age

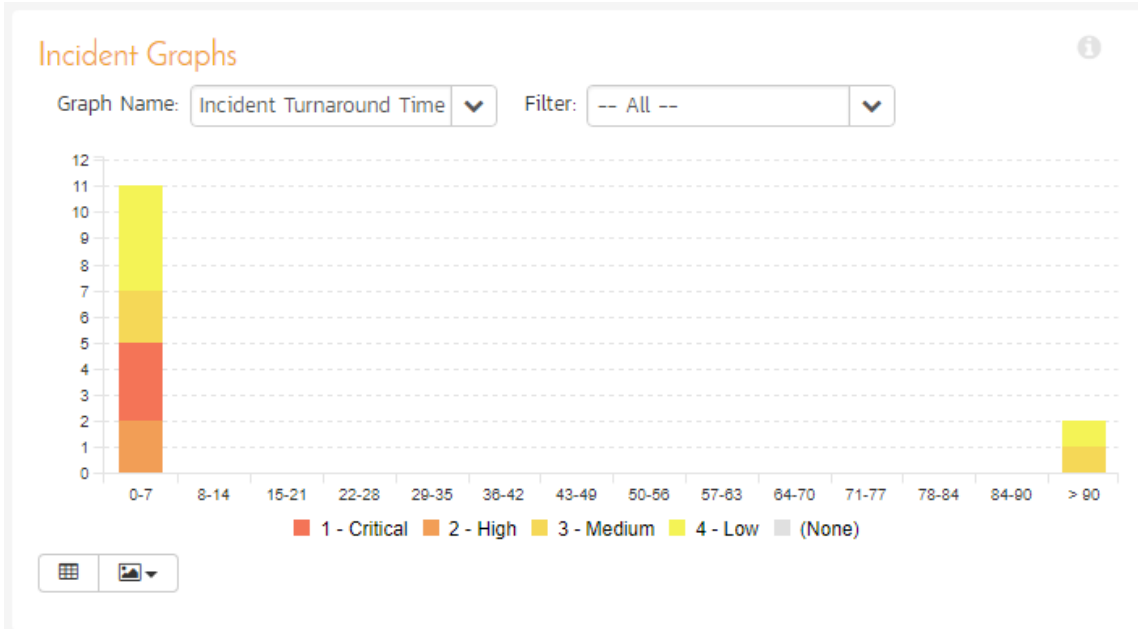
intervals on the x-axis. Each bar-chart color represents a different incident priority, giving a project manager a snapshot view of the age of open project incidents by priority.



This report can be filtered by the type of incident, so for example you can see the aging of just bugs, or just issues for the project in question. Clicking on the [“Display Data Grid”](#) button will display the underlying data that is being used to generate the graph. In addition, clicking on the [“Download Data as CSV”](#) button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

#### 11.8.6. Incident Turnaround Time Graph

The incident turnaround time chart displays the number of days incidents have taken to be closed (from the time they were first raised) in the system. The chart is organized as a stacked histogram, with the count of incidents on the y-axis and different turnaround time intervals on the x-axis. Each bar-chart color represents a different incident priority, giving a project manager a snapshot view of the turnaround time of project incidents by priority.



This report can be filtered by the type of incident, so for example you can see the turnaround time of just bugs, or just issues for the project in question. Clicking on [“Display Data Grid”](#) button will display the underlying data that is being used to generate the graph. In addition, clicking on the [“Download Data as CSV”](#) button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.8.7. Task Velocity Chart

The Task Velocity graph shows the total estimated and actual effort (in number of hours) delivered in each project release and/or iteration:



The y-axis of the graph displays the total estimated and actual effort delivered (in hours), and the x-axis can be configured to display three different levels of granularity:

- **All Releases** – This shows the total estimated and actual effort for each of the releases in the project
- **Specific Release** – This shows the total estimated and actual effort for each of the iterations in the selected release
- **Specific Iteration** – This shows the total estimated actual effort for each working day in the date-range covered by the selected iteration.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

#### 11.8.8. Task Burnup Chart

The Task Burnup graph shows the cumulative amount of work outstanding for each release/iteration in the project with separate lines for the estimated and ideal burnup. In addition, the graph includes bars for the remaining and completed effort in each time period on the x-axis.



The y-axis of the graph displays the cumulative increase in work (in hours) for the project (the actual burnup), with a blue line indicating the ideal burnup. In addition, there are bars displayed at each interval of the x-axis that shows the remaining effort and completed effort for that interval.

The x-axis can be configured to display three different levels of granularity:

- **All Releases** – This shows the increase in work for each of the releases in the project
- **Specific Release** – This shows the increase in work for each of the iterations in the selected release
- **Specific Iteration** – This shows the increase in work for each working day in the date-range covered by the selected iteration.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.8.9. Task Burndown Chart

The Task Burndown graph shows the remaining work (in hours) that needs to be done for each release/iteration in the project with separate lines for the estimated and ideal burndown. In addition, the graph includes bars for the remaining and completed effort in each time period on the x-axis.





The y-axis of the graph displays the total remaining work that needs to be done (the actual burndown), with a blue line indicating the ideal burndown. In addition, there are bars displayed at each interval of the x-axis that shows the remaining effort and completed effort for that interval.

The x-axis can be configured to display three different levels of granularity:

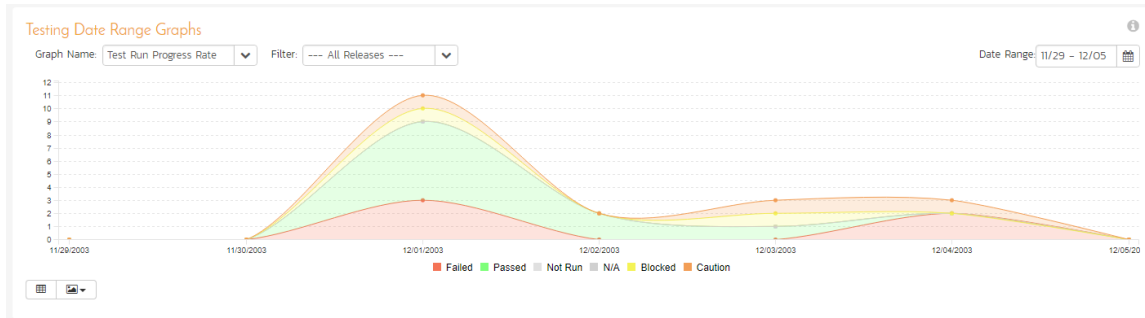
- **All Releases** – This shows the total remaining work that needs to be done for each of the releases in the project
- **Specific Release** – This shows the total remaining work that needs to be done for each of the iterations in the selected release
- **Specific Iteration** – This shows the total remaining work that needs to be done for each working day in the date-range covered by the selected iteration.

Clicking on the [“Display Data Grid”](#) button will display the underlying data that is being used to generate the graph. In addition, clicking on the [“Download Data as CSV”](#) button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

## 11.9. Date-Range Graphs

### 11.9.1. Test Run Progress Rate Graph

The test run progress rate graph shows how many tests have been executed during a period of time, and what execution status was recorded. The report can be displayed for a specific date-range and for the entire project or for a specific release/iteration:

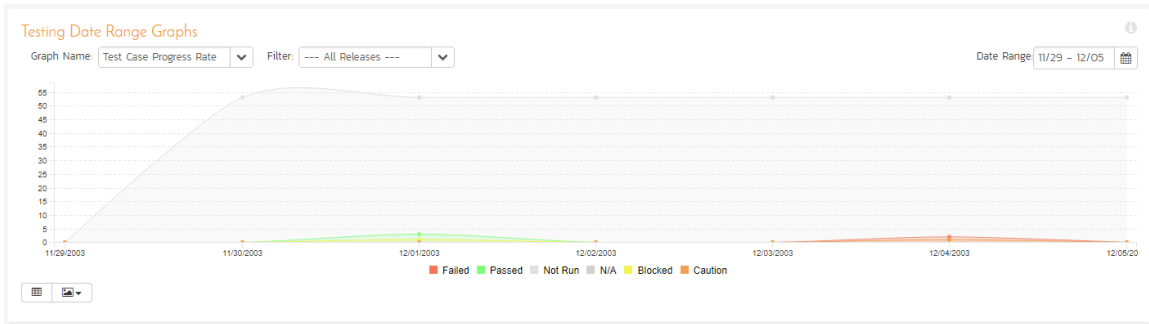


In this version of the report, the y-axis represents the number of test runs executed in each 24 hour period, and the x-axis represents a specific week in the time-span. Each data-bar can be viewed by positioning the mouse pointer over the point, and a “tooltip” will pop-up listing the actual data value. You can filter the report by the release/iteration that the test run was executed against, and also change the date range. If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.9.2. Test Case Progress Rate Graph

This graph displays the number of test case executions for the specified date range for that specific date interval. That means it will display for each day, the total number of test cases executed ignoring the status from any previous days. Any test cases not executed that day will be considered “not run” and will appear in the “not run” category. For example, if you have 10 test cases created on day 1 you will see 10 test cases “not run” on day 1. On day 2, you execute 5 test cases and fail them all, you will now see 5 test cases failed and 5 not run. On day 3, you execute 3 of the previous 5 test cases and pass them. You will now see 3 test cases passed, 0 failed and 7 not run.



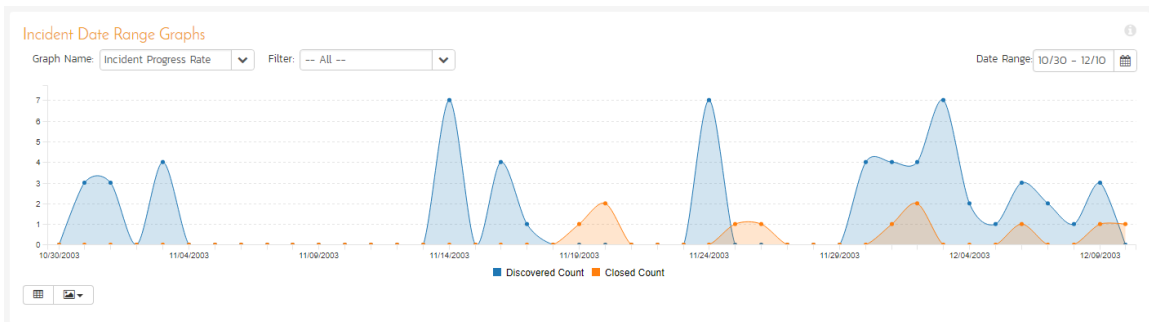
### 11.9.3. Test Case Cumulative Progress Graph

This graph displays the number of test case executions cumulatively over the specified date range. That means it will display for each day, the total number of test cases executed plus the status from any previous days that have not been changed. Any test cases not executed up to that point will be considered “not run” and will appear in the “not run” category. For example, if you have 10 test cases created on day 1 you will see 10 test cases “not run” on day 1. On day 2, you execute 5 test cases and fail them all, you will now see 5 test cases failed and 5 not run. On day 3, you execute 3 of the previous 5 test cases and pass them. You will now see 3 test cases passed, 2 failed and 5 not run.



### 11.9.4. Incident Progress Rate Graph

The incident progress rate chart displays the total number of incidents created and closed over a particular date-range, either for all incident types or for a specific incident type:

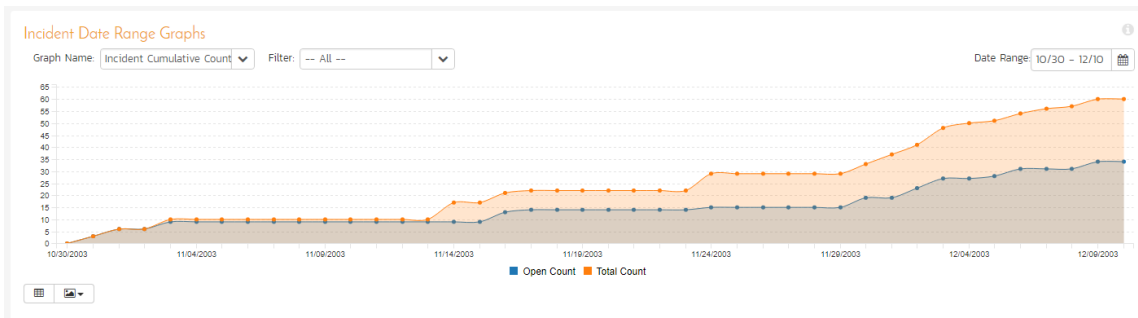


In this version of the report, the y-axis represents the number of incidents (either created or closed in a 24 hour period), and the x-axis represents a specific day in the time-span. Each data-point can be viewed by positioning the mouse pointer over the point, and a “tooltip” will pop-up listing the actual data value. You can filter the report by the type of incident, and also change the date range (e.g. displaying only the bugs for the date range). If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.9.5. Cumulative Incident Count Graph

The cumulative incident count chart displays the cumulative total number of incidents logged in the system for the current project over a particular date-range, either for all incident types or for a specific incident type. The report displays two data series, one illustrating the total count of all incidents, the other the total count of all *open incidents* (i.e. with status not set to fixed or closed):

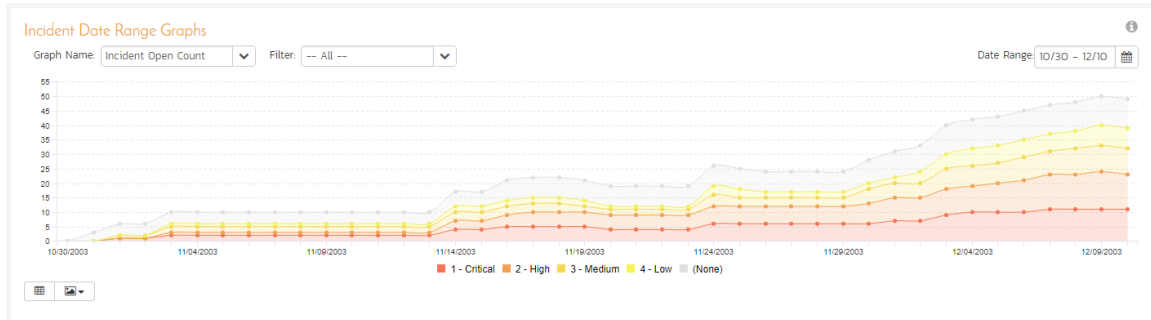


In this version of the report, the y-axis represents the number of incidents, and the x-axis represents a specific week in the time-span. Each data-point can be viewed by positioning the mouse pointer over the point, and a “tooltip” will pop-up listing the actual data value. You can also filter the type of incident being reported, as well as change the date interval. If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.9.6. Open Incident Count Graph

The open incident count chart displays the net number of open incidents in the system for the current project over a particular date-range categorized by incident priority, either for all incident types or for a specific incident type. For this chart, “open” is defined as any incident with an empty “Closed On” date. The incident status is not used for this chart.

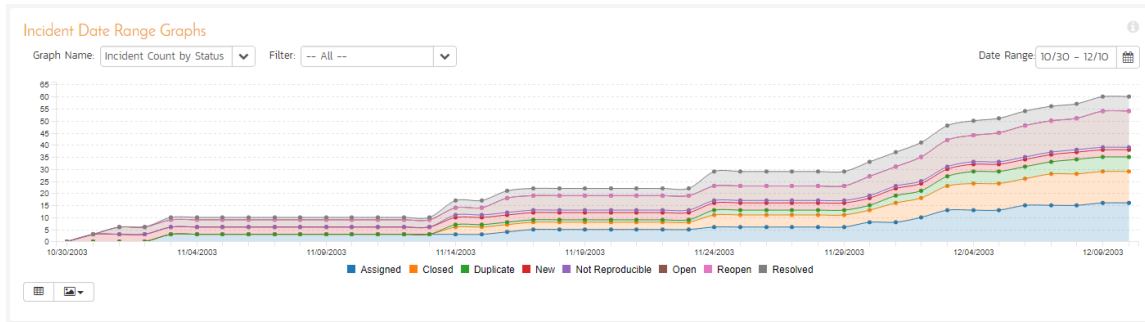


In this version of the report, the y-axis represents the number of incidents, and the x-axis represents a specific week in the time-span. The exact count of each bar in the stacked histogram can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. You can also filter the type of incident being reported, as well as change the date interval. If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the “[Display Data Grid](#)” button will display the underlying data that is being used to generate the graph. In addition, clicking on the “[Download Data as CSV](#)” button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.9.7. Incident Count by Status Graph

The incident status count chart displays the number of open incidents in the system for the current project over a particular date-range categorized by incident status, either for all incident types or for a specific incident type. For this chart, “open” is defined as any incident with an empty “Closed On” date. The incident status is not used for this chart.



In this version of the report, the y-axis represents the number of incidents, and the x-axis represents a specific week in the time-span. The exact count of each bar in the stacked histogram can be viewed by positioning the mouse pointer over the bar, and a “tooltip” will pop-up listing the actual data value. You can also filter the type of incident being reported, as well as change the date interval. If you choose a smaller date-range, the x-axis will switch from weekly to daily and if you choose a larger date-range, the x-axis will switch to monthly.

Clicking on the [“Display Data Grid”](#) button will display the underlying data that is being used to generate the graph. In addition, clicking on the [“Download Data as CSV”](#) button will export the datagrid into Comma Separated Values (CSV) format that can be opened in MS-Excel. Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).

### 11.10 Custom Graphs

These are the graphs that a SpiraTeam administrator has created in the Administration section of the system and published for use by end users. They rely on specific ESQL data queries, so the data represented will depend on the query created by the administrator.

To add a custom graph to your reports dashboard, click on the **Add Items** icon and choose Custom Graphs:

#### Add/Remove Items

Choose which items you'd like to add:

Closed Widgets (0)

Available Widgets (12)

**Available Widgets**

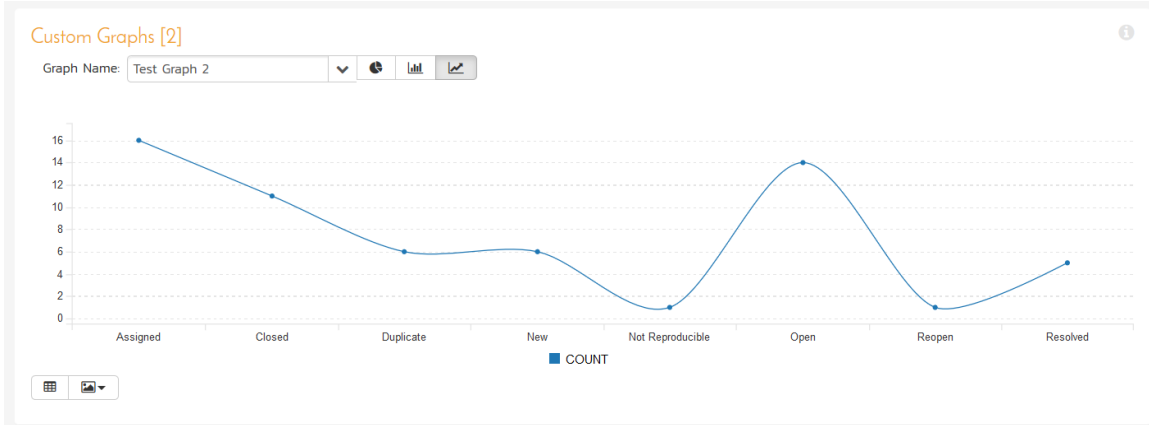
Custom Graphs

Incident Custom Graphs raphs

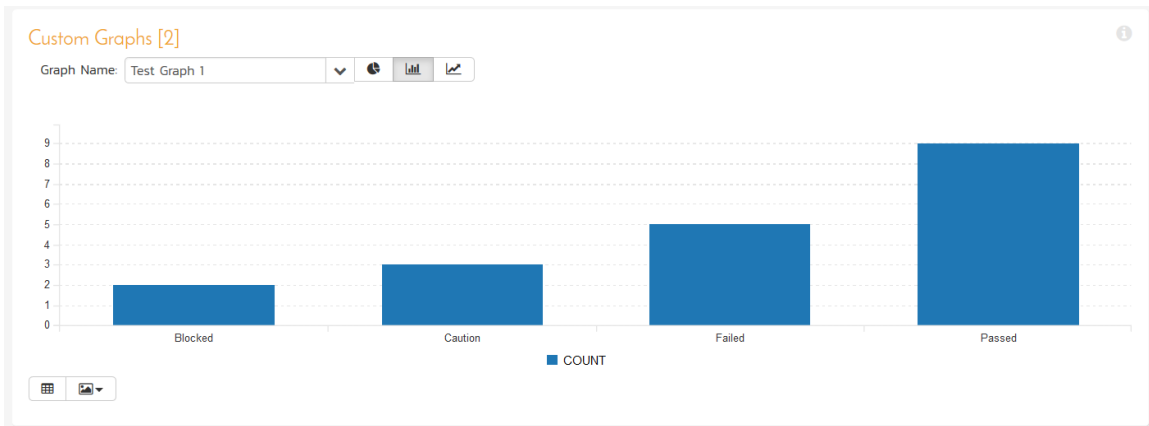
Testing Date Range Graphs

Add to Side Bar

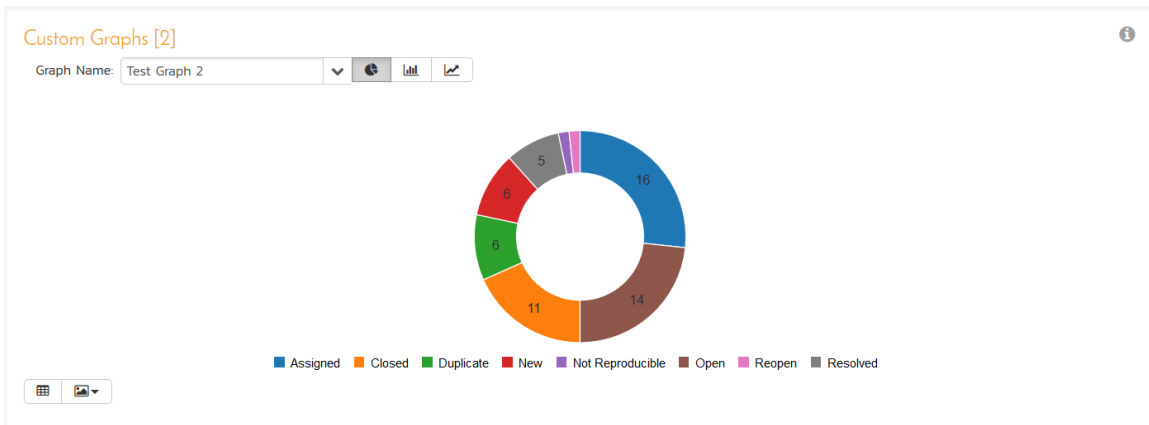
Once you add the Custom Graphs widget to your dashboard, you will see the following:



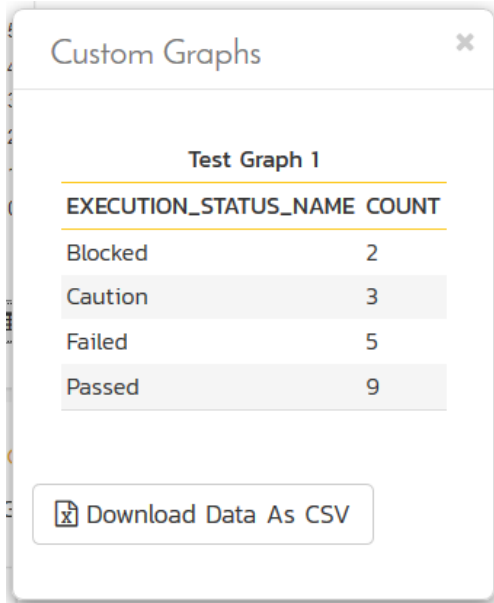
You can change which custom graph will be used in this widget by simply changing the values in the dropdown list:



You can also change the graph display between the three display types: donut, bar, and line. The donut style of graph is only available for reports with a single data series:



Clicking on the “[Data Grid](#)” icon will display the underlying data that is being used to generate the graph.



EXECUTION_STATUS_NAME	COUNT
Blocked	2
Caution	3
Failed	5
Passed	9

Download Data As CSV

In addition, clicking on the “[Download Data as CSV](#)” button will export the data grid into Comma Separated Values (CSV) format that can be opened in MS-Excel.

Some browsers also support the ability to save the graph as an image file (JPEG, PNG and GIF formats).



## 12. Source Code

This section outlines the source code integration features of SpiraPlan® and SpiraTeam® that can be used to browse the source code repository associated with a particular project and link artifacts in SpiraTeam to revisions / commits made in the source code repository. This functionality allows project members to quickly view files in the repository through a convenient web interface and also to see the end-to-end traceability from requirements, tasks and incidents to the code changes that addressed the requirement, fulfilled the task or resolved the incident

The software can be integrated with a variety of different version control / Software Configuration Management (SCM) systems by means of different plug-ins. This section will outline the general features irrespective of the type of version control provider being used. For details on using a specific provider (e.g. Subversion) please refer to the separate *SpiraPlan/Team Version Control Integration Guide*. This section also assumes that an administrator has already configured the project to be integrated with the version control provider. The steps for using the administrative interface are described in the separate *SpiraTeam Administration Guide*.

### 12.1. Source Code File List

When you click on Tracking > Source Code on the global navigation bar, you will be taken to the source code repository file list screen illustrated below:

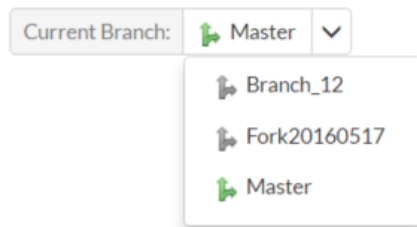
Filename	Size	Author	Latest Revision	Last Edited
Document.FileName_63.php	3563 KB	John Adams	rev0011	21-Dec-2017
Document.FileName_64.xml	3391 KB	John Adams	rev0008	21-Dec-2017
Document.FileName_65.docx	3235 KB	John Adams	rev0008	21-Dec-2017
Document.FileName_66.usd	2466 KB	John Adams	rev0008	21-Dec-2017
Document.FileName_67.pptx	3917 KB	Administrator	rev0010	21-Dec-2017
Document.FileName_68.asp	2382 KB	John Adams	rev0009	21-Dec-2017
Document.FileName_69.doc	3016 KB	John Adams	rev0010	21-Dec-2017
Document.FileName_70.php	2609 KB	Administrator	rev0013	21-Dec-2017
Document.FileName_71.java	2519 KB	Administrator	rev0002	21-Dec-2017
Document.FileName_72.ppt	1129 KB	Administrator	rev0003	21-Dec-2017
Document.FileName_73.exe	1001 KB	Administrator	rev0014	21-Dec-2017
Document.FileName_74.exe	930 KB	Administrator	rev0004	21-Dec-2017
Document.FileName_75.aspx	1234 KB	Administrator	rev0009	21-Dec-2017
Document.FileName_76.htm	661 KB	John Adams	rev0008	21-Dec-2017
Document.FileName_77.exe	3027 KB	Administrator	rev0012	21-Dec-2017

This screen consists of three main sections:

- ▶ The top left-hand pane displays a hierarchical list of the various folders that exist in the source code repository. Clicking on the expand icon will expand the child folders and clicking on the name of the folder will display the list of files in the folder in the main pane to the right.

- The main right-hand pane displays a list of all the files contained within the currently selected folder. This list can be filtered and sorted, and you can choose how many rows of documents to display on the page at one time.
- The bottom left-hand pane contains a list of the most recent revisions, together with the option to view the overall revision log for the project, clicking on that will display the revision log page (see section 12.3 for details).

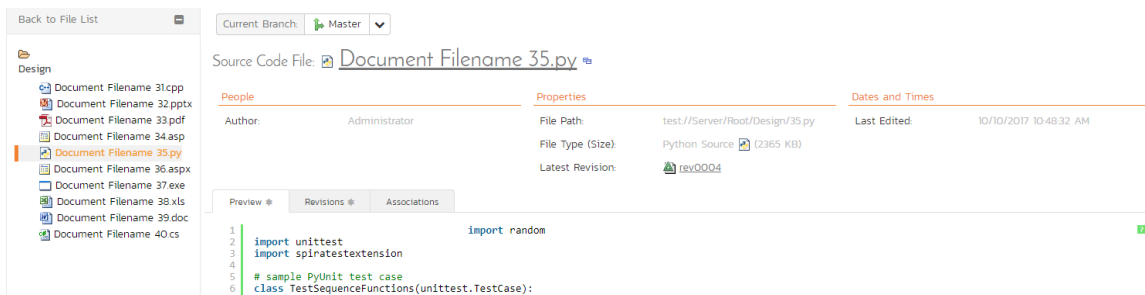
Above the main right-hand pane, there is the **branch selector**. This lets you choose which branch in the source code repository is being viewed:



Some older source code management systems (e.g. CVS, Visual SourceSafe) do not have the formal concept of branches, so the dropdown list will simply list the one main branch (usually called “Trunk”).

## 12.2. Source Code File Details

When you click on a file in the source code file list described above, you are taken to the file details page illustrated below:



This page is made up of three areas; the left pane is for navigation, the upper part of the main pane contains information regarding the file, and the bottom part of the right pane contains **three tabs** that display a preview of the file (if textual), the list of file revisions stored in the version control system, and a list of associated artifacts.

The navigation pane consists of a link that will take you back to the source code file list, as well as a list of other files in the current folder. This latter list is useful as a navigation shortcut; you can quickly view the

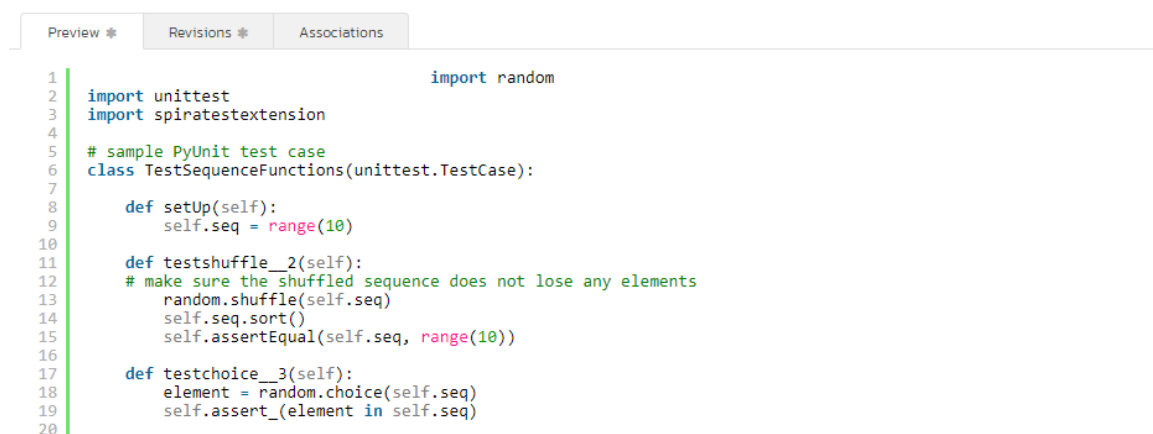
detailed information of all the peer files by clicking on the navigation links without having to first return to the main file list page.

The top part of the main pane allows you to view the details of the particular file in the version control system. Clicking on the “Source Code File” hyperlink will open the file in a separate window, and depending on the type of file, it may display in the page or prompt you to download it to your local computer. The “Latest Revision” hyperlink allows you to view details of the latest revision (see section 12.4 below).

The lower part of the main pane can be switched between the three different views by clicking the appropriate tab. Initially the pane will be in “Preview” mode, but it can be switched to “Revisions”, or “Associations” as well. The functionality in each of these views is described below:

### 12.2.1. Preview

This view is only available for files that are textual and it will display the contents of the file inside the tab, with the text color-coded to match the syntax of the programming language it is written in:



```
1         import random
2     import unittest
3     import spiratestextension
4
5     # sample PyUnit test case
6     class TestSequenceFunctions(unittest.TestCase):
7
8         def setUp(self):
9             self.seq = range(10)
10
11        def testshuffle__2(self):
12            # make sure the shuffled sequence does not lose any elements
13            random.shuffle(self.seq)
14            self.seq.sort()
15            self.assertEqual(self.seq, range(10))
16
17        def testchoice__3(self):
18            element = random.choice(self.seq)
19            self.assert_(element in self.seq)
20
```

The syntax highlighting is based on the file type and file extension, so if you save a file with an incorrect extension (e.g. using .txt for a JavaScript file) it may not display the correct color-coding. For text files that are not for a specific programming language, it will simply display as plain text

### 12.2.2. Revisions

This view displays the list of revisions that have been committed for the current file:

Revision		Author	Summary	Commit Date	Content	Properties
<input type="checkbox"/>	rev0001	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	10-Oct-2017	Yes	Yes
<input type="checkbox"/>	rev0002	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	17-Oct-2017	Yes	No

Each revision in the list is displayed with its name, the name of the person who made the revision, a description of what was changed, the date the change was made and two flags that denote whether the content was changed and/or if any of the properties of the file were changed. Clicking on the revision name will take you to the appropriate revision details page (see section 12.4).

### 12.2.3. Associations

This view displays a list of the SpiraTeam artifacts in the current project that are associated with the current file. This allows you to see which requirements, test cases, incidents, tasks, etc. are linked to the file. Clicking on the hyperlink for the artifact will take you to the appropriate artifact page inside the project (assuming your user has permissions to access that information).

Date	Artifact Name	Creator	Comment	Artifact Type	ID	Operations
10-Oct-2017	<a href="#">Ability to add new books to the system</a>	Fred Bloggs		Requirement	RQ4	<a href="#">Remove</a>

[Add Association](#)

In addition, you can use the “[Add New Association](#)” button to add a new association from the current source code file to an existing artifact in SpiraTeam:

**Add New Association** ✕

Please choose the artifact that you want to add an association to:

**Artifact Type:**  ▼

**Artifact ID:**

**Comment:**

[Add Association](#)

To add the association, you just need to select the type of artifact being associated (requirement, test case, incident, etc.) and the numeric ID of the artifact and then click the **[“Add Association”](#)** button.

For example to add an association to Requirement RQ00005 you would choose Artifact Type = Requirement and Artifact ID = 5.

### 12.3. Source Code Revision List

If you click on the **[“View Revision Log”](#)** button on the main Source Code page, it will take you to the Revision List page that displays all the revisions made to the project in a sortable, filterable list:

← Refresh Filter Current Branch: Master

Displaying 1 - 15 out of 16 revision(s) in the current repository.

Revision ▲▼	Author ▲▼	Summary ▲▼	Commit Date ▲▼	Content ▲▼	Properties ▲▼
<a href="#">rev0001</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	10-Oct-2017	Yes	Yes
<a href="#">rev0002</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	17-Oct-2017	Yes	No
<a href="#">rev0003</a>	Fred Bloggs	Fixes [N:7] and [N:8] and implements requirement [RQ:5]	10-Oct-2017	No	No
<a href="#">rev0004</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	17-Oct-2017	Yes	No
<a href="#">rev0005</a>	Fred Bloggs	Completes task [TK:2] and fixes bug [N:7]	10-Oct-2017	No	No
<a href="#">rev0006</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	24-Oct-2017	Yes	No
<a href="#">rev0007</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	31-Oct-2017	Yes	Yes
<a href="#">rev0008</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	31-Oct-2017	Yes	Yes
<a href="#">rev0009</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	31-Oct-2017	Yes	Yes
<a href="#">rev0010</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	14-Nov-2017	Yes	Yes
<a href="#">rev0011</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	14-Nov-2017	Yes	No
<a href="#">rev0012</a>	Fred Bloggs	Implements requirement [RQ:5] and also completes task [TK:1]	10-Oct-2017	Yes	No
<a href="#">rev0013</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	21-Nov-2017	No	Yes
<a href="#">rev0014</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	5-Dec-2017	No	Yes
<a href="#">rev0015</a>	Fred Bloggs	The artifact was changed in this version to fix the issue with the data access component	5-Dec-2017	Yes	No

Show 15 rows per page

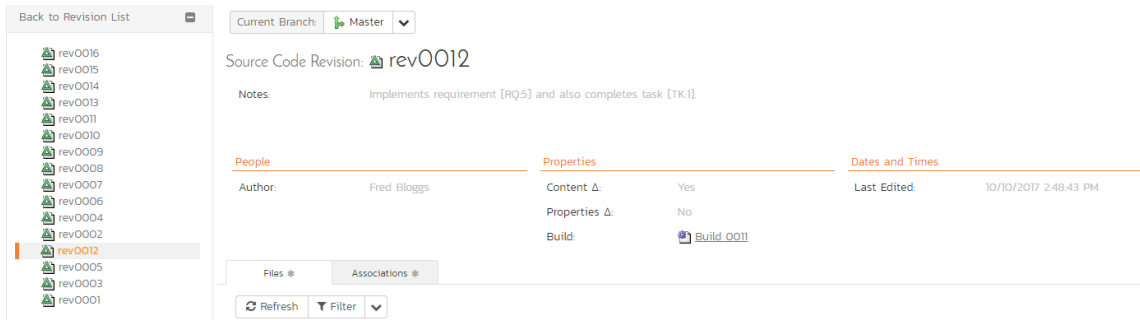
Displaying page 1 of 2

Each revision in the list is displayed with its name, a description of what changed in the revision, the name of the person who committed the revision, and whether the revision was a change of the actual content, or just a change of the properties of the content. Clicking on the hyperlink for the revision name will take you to the Revision Details page for that revision (see section 12.4 below).

Above the main right-hand pane, there is the **branch selector**. This lets you choose which branch in the source code repository is being viewed.

### 12.4. Source Code Revision Details

When you click on a revision hyperlink in either the project revision log or the file revisions tab described above, you are taken to the revision details page illustrated below:



This page is made up of three areas; the left pane is for navigation, the upper part of the main pane contains the details of the revision, and the bottom part of the right pane contains the list of files that were changed in this revision and the list of artifacts that the revision is associated with.

The navigation pane consists of a link that will take you back to the source code revision list, as well as a list of other revisions associated with the current file. This latter list is useful as a navigation shortcut; you can quickly view the detailed information of all the peer revisions by clicking on the navigation links without having to first return to the main revision list page.

The top part of the main pane allows you to view the details of this revision in the version control system, including the description of what was changed, the date that the change was made, and the name of the person who made the change.

The lower part of the main pane can be switched between two different views by clicking the appropriate tab. Initially the pane will be in “Files” mode, but it can be switched to “Associations” as well. The functionality in each of these two views is described below:

### 12.4.1. Files

This view displays the list of files that were changed in the current revision:

Files *		Associations *			
Refresh		Filter			
Filename ▲▼	Size ▲▼	Author ▲▼	Latest Revision ▲▼	Action ▲▼	Last Edited ▲▼
Document_Filename_113.cpp	2332 KB	John Adams	rev0003	Deleted	10-Oct-2017
Document_Filename_114.vb	2289 KB	John Adams	rev0005	Modified	10-Oct-2017
Document_Filename_115.aspx	2474 KB	Administrator	rev0009	Replaced	10-Oct-2017
Document_Filename_116.ppt	2199 KB	John Adams	rev0012	Replaced	10-Oct-2017
Document_Filename_117.txt	2029 KB	John Adams	rev0010	Replaced	10-Oct-2017
Document_Filename_118.asp	581 KB	John Adams	rev0015	Added	10-Oct-2017

Each file in the list is displayed with its name, the file-size, who made changes to the file, what action was performed on the file (added, deleted, replaced, updated, etc.) and the most recent revision that exists for

that file. Clicking on the filename will take you to the appropriate file details page (see section 12.2), and clicking on the revision hyperlink will take you the appropriate revision.

### 12.4.2. Associations

This view displays a list of the SpiraTeam artifacts in the current project that are associated with the current revision. This allows you to see which requirements, incidents or tasks were affected by this specific change to the source code:

Date	Artifact Name	Creator	Comment	Artifact Type	ID	Operations
10-Oct-2017	<a href="#">Ability to edit existing books in the system</a>	Fred Bloggs	Implements requirement [RQ5] and also completes t...	Requirement	RQ5	
10-Oct-2017	<a href="#">Develop new book entry screen</a>	Fred Bloggs	Implements requirement [RQ5] and also completes t...	Task	TK1	

[Add Association](#)

Clicking on the hyperlink for the artifact will take you to the appropriate artifact page inside the project (assuming your user has permissions to access that information).

In addition to the associations that are created from within the source code management system, you can add associations between source code revisions and SpiraTeam artifacts from within SpiraTeam interface itself. To do this, you simply need to click on the '[Add Association](#)' button:

#### Add New Association

Please choose the artifact that you want to add an association to:

Artifact Type:\*

Artifact ID:\*

Comment:

[Add Association](#)

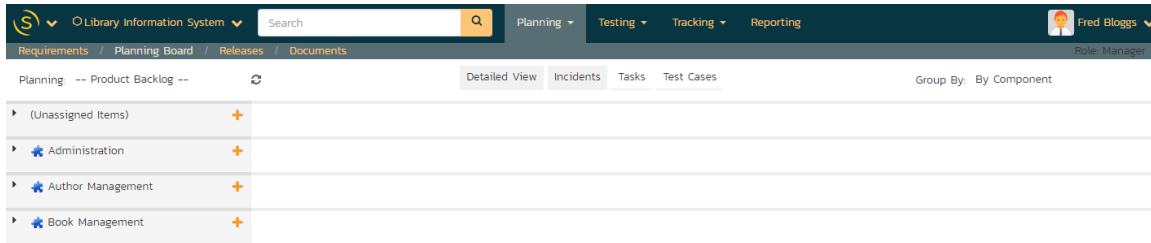
To add the association, you just need to select the type of artifact being associated (requirement, test case, incident, etc.) and the numeric ID of the artifact and then click the "[Add Association](#)" button.

For example to add an association to Requirement RQ00005 you would choose Artifact Type = Requirement and Artifact ID = 5.

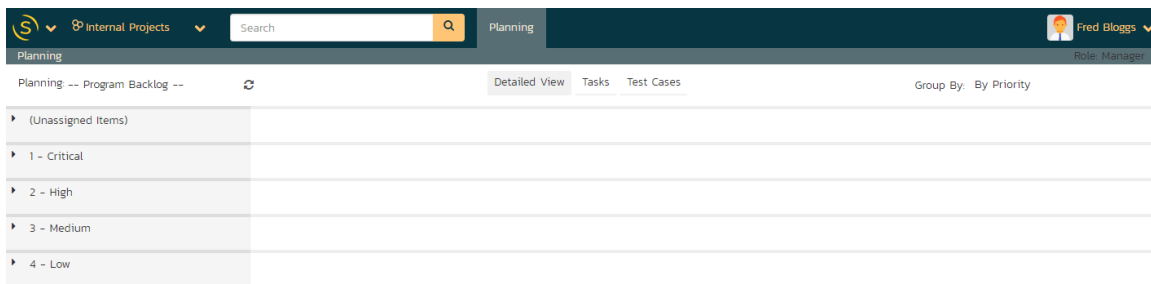
## 13. Planning Board

The SpiraTeam planning board is a great way to visualize the backlog items (requirements, tasks, test cases and incidents) planned for your project. Based on the principles of **agile methodologies** such as Scrum and Kanban, the planning board is a great tool for planning agile projects.

To access the SpiraTeam **project** planning board, select a project and go to Planning > Planning Board and the following screen will be displayed:



To access the SpiraTest **project group** planning board, select a project group and go to the Planning menu and the following screen will be displayed:



We shall first discuss the project planning board, and then in section 13.5 we will cover the project group planning board.

By default, the system will display the project planning board in the product backlog view, with the backlog organized by component. You can change the view by click on the '**Planning**' drop down list:

- **Product Backlog** – This displays a list of all the backlog items that are not currently scheduled for a specific release or iteration. The items can be organized by component, package, priority or person.
- **All Releases** – This displays a list of all the releases as well as the product backlog and is designed to let you easily move items from the product backlog to a specific release.
- **Release View** – This displays a list of all the backlog items that are scheduled for the selected release and lets you organize them by iteration, status, or person.



- **Iteration View** - This displays a list of all the backlog items that are scheduled for the selected iteration (also known as a Sprint in some methodologies) and lets you organize them by status, or person.

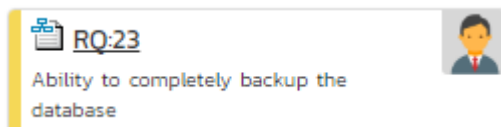
The **'Group By'** dropdown list is used to change how the view is organized. This list of options available in the 'Group By' dropdown will depend on the view being displayed.

The planning board will include the following backlog items:

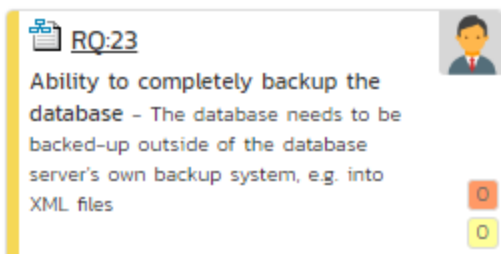
- **Requirements and Incidents** – these are displayed as 'story cards' and are the primary items that can be moved in the planning board.
- **Tasks and Test Cases** – these are secondary artifacts and are considered part of a requirement. So within the planning board they are displayed as being part of a specific requirement, and if you move a requirement, the associated tasks and test cases will move as well.

The backlog items themselves can be configured to display in different ways. The choice of display will depend on how many backlog items you have to display, how large your screen is and what information you need. The display is controlled by the four checkboxes at the top of the planning board:

- **Standard View** – This is the view that will be displayed when 'detailed view' is unchecked. It displays the minimum necessary information in each story card, but maximizes how many story cards can be displayed on the screen. Each story card will contain the icon, ID, name, user avatar, and estimate (in story points) of the requirement.



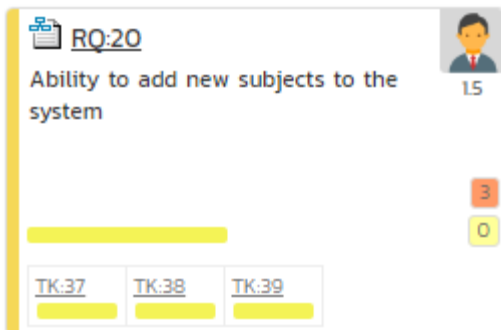
- **Detailed View** – This view includes additional information in each story card. It adds the long description, a progress bar indicator (that indicates what percentage of the item has been completed) and for requirement artifacts it includes the number of tasks (red background) and number of test cases (yellow background) in the two small boxes under the user:



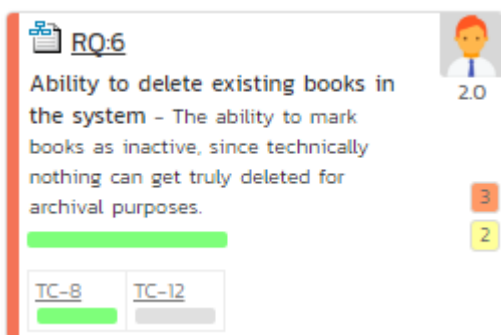
- **Incidents** – The planning board will always include requirement backlog items, but because the number of incidents can be very large, there is the option to include/exclude them from the planning board. When you have the “Incidents” checkbox selected, incidents will appear in the planning board with their own story card format. The main difference is that the effort is recorded in hours rather than story points:



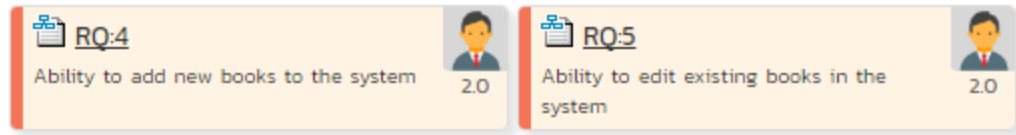
- **Tasks** – When the Tasks option is selected, the planning board will display the tasks associated with the requirements as part of each story card. Each task will be displayed with its ID and a miniature progress bar:



- **Test Cases** – When the Test Cases option is selected, the planning board will display the test cases associated with the requirements as part of each story card. Each test case will be displayed with its ID and a miniature test coverage bar-chart:



Regardless of the view, backlog items can be moved using “drag and drop” between the different parts of the planning board. To drag and drop multiple items, you should first select the items so that they are highlighted. Then you can drag and drop the entire selection:



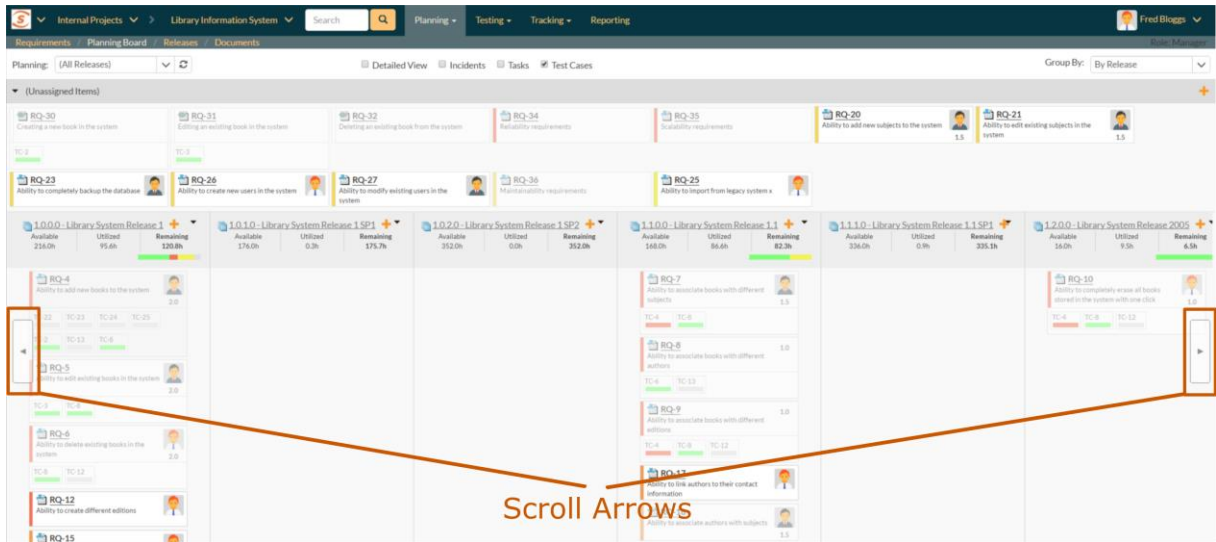
You can add new requirement backlog items by clicking the “+” button. This will display the following dialog box:

The 'Add Requirement' dialog box is displayed. It has a title bar with a close button. The form contains the following fields:

- Name: \* (text input)
- Description: (text area)
- Status: \* (dropdown menu, currently 'Requested')
- Type: \* (dropdown menu, currently 'User Story')
- Release: (dropdown menu, currently '-- None --')
- Author: \* (dropdown menu, currently 'Fred Bloggs')
- Owner: (radio button, currently '-- None --')
- Importance: (dropdown menu, currently '-- None --')
- Component: (dropdown menu, currently '-- None --')
- URL: (text input)
- Difficulty: (dropdown menu, currently '--- Please Select ---')
- Classification: (dropdown menu, currently '--- Please Select ---')
- Ranking: (text input)
- Decimal: (text input)
- Estimate: (text input, currently '1.0') with a unit selector 'points ( hours)'
- Review Date: (calendar icon)

At the bottom, there are two buttons: 'Add Requirement' (orange) and 'Cancel' (white).

On this screen you can enter the fields for a new requirement, click “[Add Requirement](#)” and the requirement will be added to the appropriate section of the planning board.



In some of the views of the planning board there will be more data that can be displayed on one screen, in which case you will be able to scroll the planning board left and right using the specially provided arrow buttons (see above).

Each of the views is now described in more detail in the sections below.

### 13.1. Product Backlog Planning

The product backlog view is designed to let you view the backlog items that have been created for the project and have not yet been assigned to a specific release or iteration. The backlog items can be requirements or incidents, and in the case of requirements, you can see the tasks and test cases associated with a specific requirement.

In this view you can drag and drop the backlog items from one section (e.g. component) to another and also rearrange the backlog items in their relative order. By default, the items are sorted according to their priority/importance value (the color of which is indicated in the left-hand side of the story card), but you can drag and drop them into a different order. This is particularly useful when you have several items of the same priority and you need to rank them. This process is typically called **backlog grooming**.

#### 13.1.1. Product Backlog – By Component

This view is designed to let you see the product backlog organized by Component. Each of the components is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items can be requirements (with associated tasks and test cases) or incidents.

Planning -- Product Backlog -- ↻ Detailed View Incidents Tasks Test Cases Group By: By Component

- ▶ (Unassigned Items) +
- ▶ Administration +
  - RQ23 Ability to completely backup the database
  - IN23 Ability to import data from excel
  - RQ26 Ability to create new users in the system
  - IN39 Exporting data to excel
  - RQ27 Ability to modify existing users in the system
  - RQ25 Ability to import from legacy system x
- ▶ Author Management +
  - RQ23 Ability to completely backup the database
  - IN23 Ability to import data from excel
  - RQ26 Ability to create new users in the system
  - IN39 Exporting data to excel
  - RQ27 Ability to modify existing users in the system
  - RQ25 Ability to import from legacy system x
- ▶ Book Management +
  - IN33 Management of children's loans

The top section will contain the list of items that are not assigned to a component, with the other sections containing the items that belong to the specific component.

### 13.1.2. Product Backlog – By Package

This view is designed to let you see the product backlog organized by requirement package (a summary requirement). Each of the packages is displayed on the left-hand side in a hierarchical structure, and the backlog items displayed in the same row on the right. The backlog items can be child requirements (with associated tasks and test cases) or incidents. In this view the incidents are the ones linked to the package through an association.

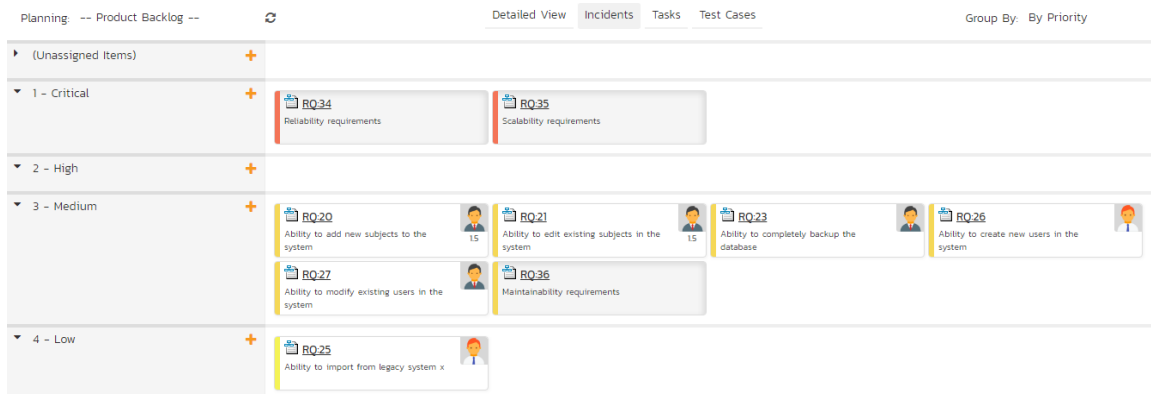
Planning -- Product Backlog -- ↻ Detailed View Incidents Tasks Test Cases Group By: By Package

- ▶ (Unassigned Items) +
- ▶ Functional System Requirements +
- ▶ Online Library Management System +
  - ▶ Book Management +
  - ▶ Edition Management +
  - ▶ Author Management +
    - Ability to add new authors to the system
  - ▶ Subject Management +
    - RQ20 Ability to add new subjects to the system
    - RQ21 Ability to edit existing subjects in the system
  - ▶ Administration Functions +
  - ▶ Data Import Functionality +
    - RQ25 Ability to import from legacy system x
- ▶ Use Cases +
- ▶ System Qualities +

The top section will contain the list of items that are not assigned to a package, with the other sections containing the items that are children of the specific package.

### 13.1.3. Product Backlog – By Priority

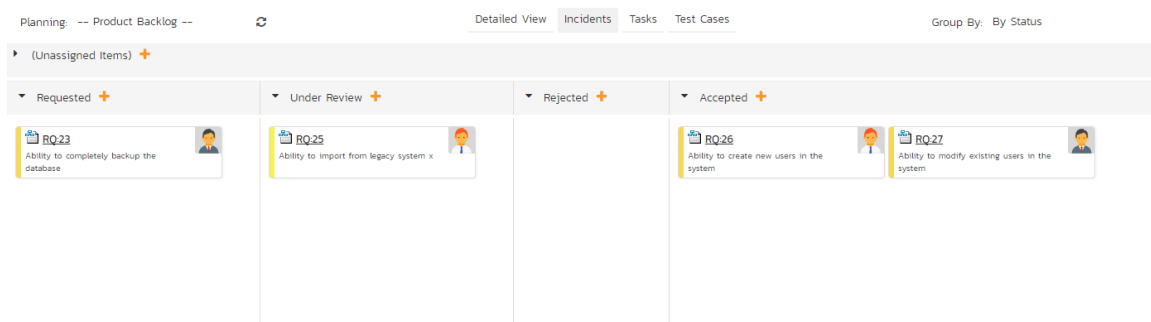
This view is designed to let you see the product backlog organized by requirement importance. Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).



The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.

### 13.1.4. Product Backlog – By Status

This view is designed to let you see the product backlog organized by requirement status. Each of the possible status values (for an unscheduled item) is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases). This view is commonly called a **Kanban** board:



Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Requested > Accepted). Once a requirement is assigned to a release or iteration it will come automatically 'Planned' and not appear in this view. You can drag and drop the requirements between the different statuses.

## 13.2. Release Planning

The 'All Releases' option lets you view all of the backlog items that have already been assigned to a release - and are therefore not in the product backlog. The backlog items can be requirements or incidents, and in the case of requirements, you can see the tasks and test cases associated with a specific requirement.

The lower section of the board allows you to view the items by either by release, priority, status, or person. Each section below will discuss each option in turn.

### 13.2.1. Release Planning – By Release

This release planning view is designed to let you view the backlog items that have been created for the project and associate them with different releases defined for the project

The screenshot displays a 'Planning (All Releases)' board with a 'Detailed View' tab selected. The board is organized into columns for different releases: 1.0.0.0, 1.0.1.0, 1.0.2.0, 1.1.0.0, and 1.1.1.0. Each column header shows release details like 'Available', 'Utilized', and 'Remaining' time. Below each header, items are categorized as Requirements (RQ) or Incidents (IN). For example, RQ.4 is 'Ability to add new books to the system' and IN.1 is 'Cannot log into the application'. A '(Unassigned Items)' section is visible at the top left.

The 'Unassigned Items' section at the top allows you to see all the items not currently planned, and you can then drag and drop them into one of the lower sections that correspond to a specific release. Using the scroll arrows you can cycle through the releases and move any items from one release to another.

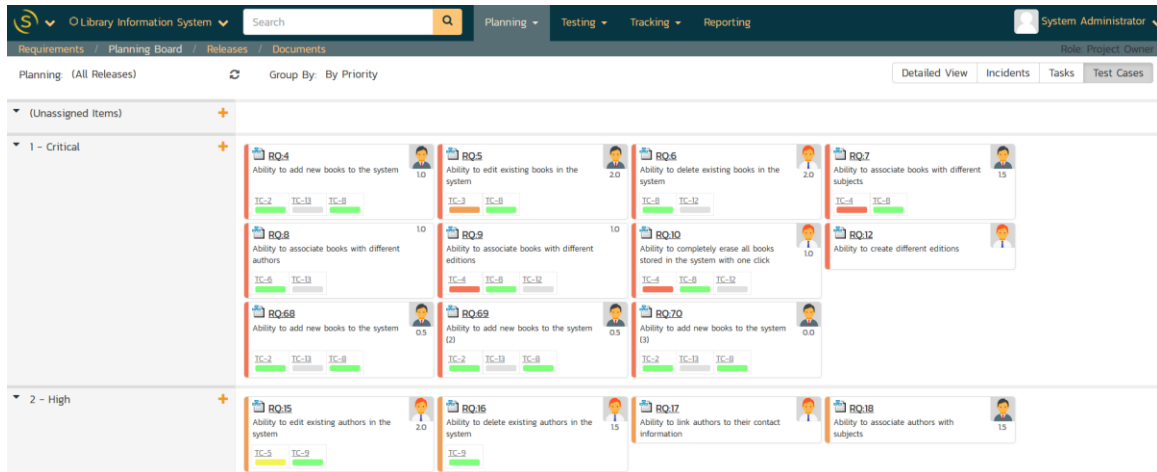
The header of each release section shows the overall progress and utilization of the release:

A close-up of the release header for '1.0.0.0 - Library System Release'. It includes a plus sign icon, the release name, and a progress bar. The statistics shown are: Available: 216.0h, Utilized: 98.6h, and Remaining: 117.4h.

Clicking on the Release hyperlink will switch the planning board into the 'Release Backlog' view described in section 13.3 below.

### 13.2.2. Release Planning – By Priority

This view is designed to let you see the list of planned backlog items, organized by requirement importance. Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).



The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.

### 13.2.3. Release Planning – By Status

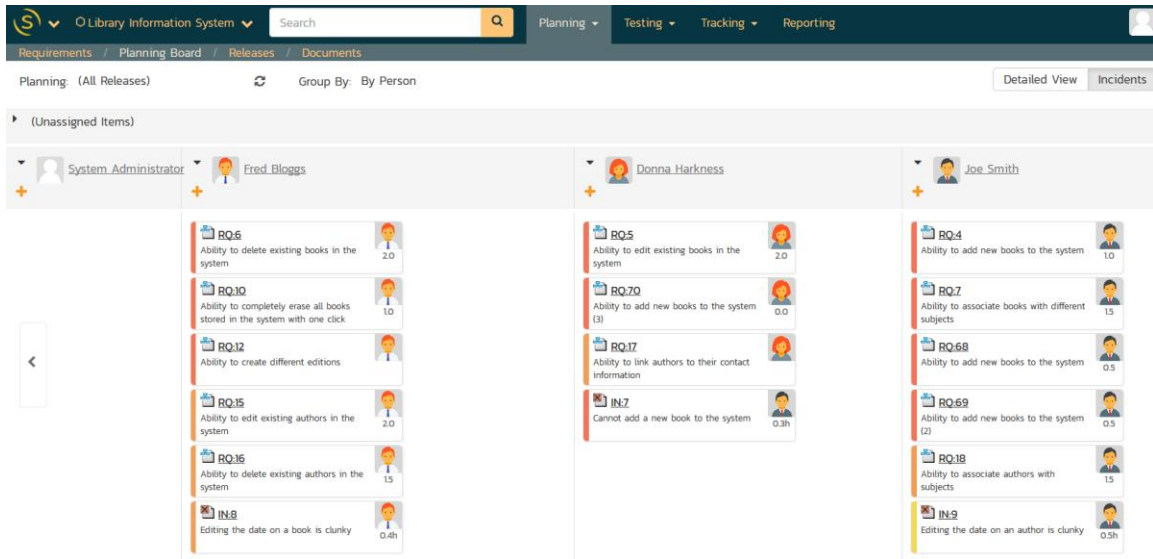
This view is designed to let you see the project planned items organized by requirement status. Each of the possible status values (for a planned item) is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases). This view is commonly called a **Kanban** board:



Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Planned > Completed). You can click on the expand/collapse icons to hide any statuses that are not used. You can drag and drop the requirements between the different statuses. If you have the planning options enabled to have requirements status' automatically update based on changes to the associated tasks and test cases, then items will automatically move between the statuses based on tasks being completed and test cases being executed.

#### 13.2.4. Release Planning – By Person

This view is designed to let you see the project planned items organized by resource / person. Each of the users that is a member of the current release is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view can be either requirements (with associated tasks and test cases) or incidents.



You can click on the expand/collapse icons to hide any resources that are not relevant. Above the resource headings there is a section with the release name; that contains backlog items that are scheduled for the current release but have not yet been assigned to a resource. You can drag and drop the backlog items between resources or to/from the release backlog. Any backlog items not assigned to a resource and release will be listed in the (Unassigned Items) section at the top.

### 13.3. Release Backlog Planning

The release backlog view is designed to let you view the backlog items that have been assigned to the selected release. You can always see the items not currently assigned to any release by expanding the 'Unassigned Items' section and then drag those items into the current release.

The lower section of the board allows you to segment the items by either iteration/sprint (typically used in **Scrum**), by status (typically used in **Kanban**), or by person.



The screen above illustrates the items being segmented by iteration/sprint for the current release.

### 13.3.1. Release Backlog – By Iteration

This view is designed to let you see the release backlog organized by iteration / sprint. Each of the iterations defined for the current release is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view can be either requirements (with associated tasks and test cases) or incidents. This view is commonly called a **Scrum** board:



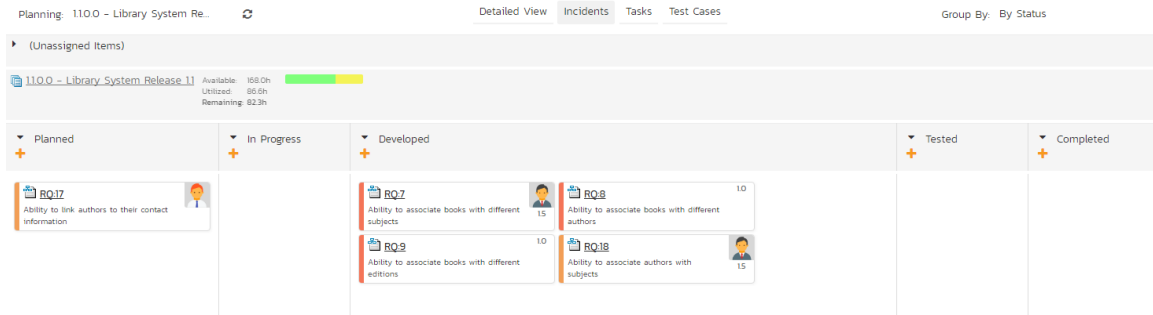
You can drag and drop the requirements between the different iterations. If you schedule a requirement for a specific iteration, all the child tasks that have not yet been started, will follow the parent requirement in being associated with the iteration. Once the backlog item has been added to the iteration, the utilized effort for the iteration will increase, and the available effort will decrease by the same amount.

Note: The system will allow you to assign more backlog items to an iteration than it is possible to complete, however this will result in a negative value for 'available effort'. If this happens, the "Available Effort" value will be displayed in red, and you need to rebalance the items, extend the iteration length or add project personnel resources to the iteration.

Clicking on the Iteration hyperlinks in the headers will switch the planning board into the 'Iteration Backlog' view described in section 13.4 below.

### 13.3.2. Release Backlog – By Status

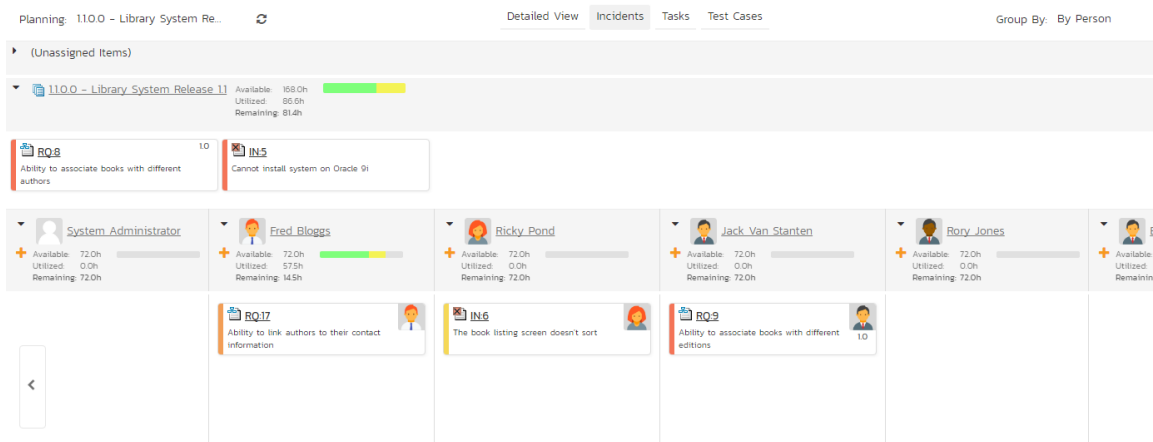
This view is designed to let you see the release backlog organized by requirement status. Each of the possible status values (for a planned item) is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases). This view is commonly called a **Kanban** board:



Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Planned > Completed). You can click on the expand/collapse icons to hide any statuses that are not used. You can drag and drop the requirements between the different statuses. If you have the planning options enabled to have requirements status' automatically update based on changes to the associated tasks and test cases, then items will automatically move between the statuses based on tasks being completed and test cases being executed.

### 13.3.3. Release Backlog – By Person

This view is designed to let you see the release backlog organized by resource / person. Each of the users that is a member of the current release is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view can be either requirements (with associated tasks and test cases) or incidents.



You can click on the expand/collapse icons to hide any resources that are not relevant. The system will display a progress bar for each resource to illustrate the allocation for that resource. Any resource that has a progress bar that is completely green has been fully scheduled and should not have any additional items assigned. If the progress bar for that resource turns red, it means that they have been over-scheduled and you need to reassign some of the items.

Above the resource headings there is a section with the release name; that contains backlog items that are scheduled for the current release but have not yet been assigned to a resource. You can drag and drop the backlog items between resources or to/from the release backlog. Any backlog items not assigned to a resource and release will be listed in the (Unassigned Items) section at the top.

### 13.3.4. Release Backlog – By Priority

This view is designed to let you see the list of planned backlog items in the current release, organized by requirement importance. Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).

The screenshot shows a software interface for a 'Library Information System'. The top navigation bar includes 'Requirements', 'Planning Board', 'Releases', and 'Documents'. The main area is titled 'Planning: 110.0 - Library System R...' and is grouped by 'By Priority'. The backlog is organized into four priority levels:

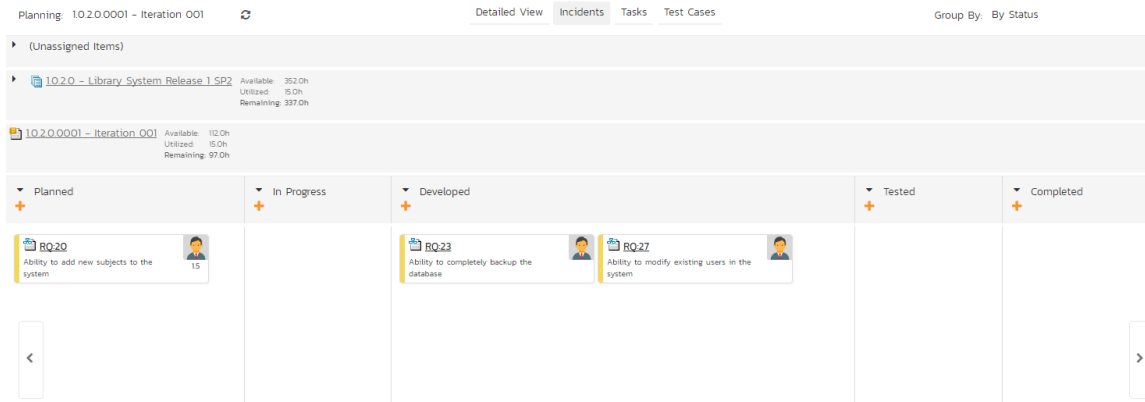
- 1 - Critical:** Contains three requirements (RQ.7, RQ.8, RQ.9). RQ.7 is 'Ability to associate books with different subjects' (importance 15) with tasks TK.10, TK.11, TK.12, TK.13. RQ.8 is 'Ability to associate books with different authors' (importance 10) with tasks TK.14, TK.15. RQ.9 is 'Ability to associate books with different editions' (importance 10) with tasks TK.16, TK.17.
- 2 - High:** Contains two requirements (RQ.17, RQ.18). RQ.17 is 'Ability to link authors to their contact information' (importance 15) with tasks TK.30, TK.31, TK.32. RQ.18 is 'Ability to associate authors with subjects - There is a master list of subjects, and the idea is that authors write on many subjects, but it would be useful to find all Science Fiction' (importance 15) with tasks TK.33, TK.34, TK.35, TK.36.
- 3 - Medium:** No items are visible.
- 4 - Low:** No items are visible.

The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.

### 13.4. Iteration Backlog Planning

The iteration backlog view is designed to let you view the backlog items that have been assigned to the selected iteration / sprint. You can always see the items not currently assigned to any release or iteration by expanding the 'Unassigned Items' section and then drag those items into the current release or iteration.

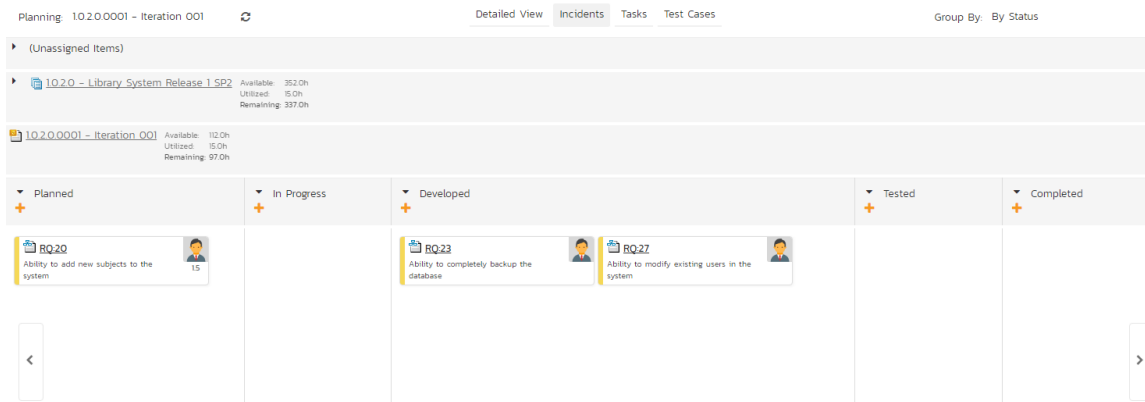
The lower section of the board allows you to segment the items by either status (typically used in **Kanban**), or by person. You can also view the Task artifacts by person or status for the current iteration.



The screen above illustrates the items being segmented by resource for the current iteration / sprint.

### 13.4.1. Iteration Backlog – By Status

This view is designed to let you see the iteration / sprint plan organized by requirement status. Each of the possible status values (for a planned item) is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases).



Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Planned > Completed). You can drag and drop the requirements between the different statuses. If you have the planning options enabled to have requirements status' automatically update based on changes to the associated tasks and test cases, then items will automatically move between the statuses based on tasks being completed and test cases being executed.

### 13.4.2. Iteration Backlog – By Person

This view is designed to let you see the iteration / sprint plan organized by resource / person. Each of the users that is a member of the current iteration is displayed as a heading, with the backlog items displayed

in the same column underneath. The backlog items in this view can be either requirements (with associated tasks and test cases) or incidents.

The screenshot displays a project management interface with the following components:

- Header:** "Planning: 1.0.2.0.0001 - Iteration 001" with a refresh icon. Navigation tabs include "Detailed View", "Incidents", "Tasks", and "Test Cases".
- Unassigned Items:** A section at the top containing:
  - "1.0.2.0 - Library System Release 1 SP2" with a progress bar (15.0h utilized, 337.0h remaining).
  - "1.0.2.0.0001 - Iteration 001" with a progress bar (15.0h utilized, 97.0h remaining).
- Resource Grid:** A grid showing resource availability for four individuals:
  - System Administrator:** Available: 56.0h, Utilized: 0.0h, Remaining: 56.0h.
  - Fred Bloggs:** Available: 56.0h, Utilized: 0.0h, Remaining: 56.0h.
  - Ricky Pond:** Available: 56.0h, Utilized: 0.0h, Remaining: 56.0h.
  - Jack Van Stanten:** Available: 56.0h, Utilized: 0.0h, Remaining: 56.0h.
- Backlog Items:** Requirements are listed below the resources:
  - RQ-23:** Ability to completely backup the database (assigned to Fred Bloggs).
  - RQ-27:** Ability to modify existing users in the system (assigned to Fred Bloggs).
  - RQ-20:** Ability to add new subjects to the system (assigned to Ricky Pond, with a value of 15).

You can click on the expand/collapse icons to hide any resources that are not relevant. The system will display a progress bar for each resource to illustrate the allocation for that resource. Any resource that has a progress bar that is completely green has been fully scheduled and should not have any additional items assigned. If the progress bar for that resource turns red, it means that they have been over-scheduled and you need to reassign some of the items.

Above the resource headings there are sections with the release and iteration name; they contain backlog items that are scheduled for the current release or iteration but have not yet been assigned to a resource. You can drag and drop the backlog items between resources or to/from the release/iteration backlog. Any backlog items not assigned to a resource and release/iteration will be listed in the (Unassigned Items) section at the top.

### 13.4.3. Iteration Backlog – By Priority

This view is designed to let you see the list of planned backlog items in the current iteration, organized by requirement importance. Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).

The screenshot displays a software requirements management tool interface for a 'Library Information System'. The top navigation bar includes 'Requirements', 'Planning Board', 'Releases', and 'Documents'. Below this, there's a search bar and tabs for 'Planning', 'Testing', 'Tracking', and 'Reporting'. The main area is titled 'Planning: 10.0.0.0001 - Iteration 0...' and is grouped by 'By Priority'. It displays a list of requirements categorized by priority: '(Unassigned Items)', '1 - Critical', '2 - High', and '3 - Medium'. The '1 - Critical' section is expanded, showing five requirement cards: RQ.4, RQ.5, RQ.68, RQ.69, and RQ.70. Each card includes a description, a progress bar, and associated test cases (TC-2, TC-13, TC-8).

The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.



## 14. Mobile Access

This section describes the functionality available in SpiraTeam® when accessing the system from a mobile device such as an iOS® smartphone / tablet (iPod Touch®, iPhone® and iPad®) or an Android® smartphone / tablet (Galaxy, Nexus, Droid, Kindle Fire®, etc.).

The application has been designed to be fully “responsive”, which means that it will dynamically rearrange the page based on the screen-sized used, to create an optimal experience on any device. As much as possible the application provides a consistent set of functions for any device. However, in order to make using the application on smaller devices as easy as possible, necessarily the experience on say, a smartphone, is less complete than on a desktop.

Whenever this user guide has referred to performing an action by ‘clicking’ if the same functionality is available, then ‘tapping’ on a mobile device will yield the same result. Due to the limitations of mobile devices, hovering over an element to display a “tooltip” is not possible.

Below, some illustrations of how the application looks at different screen sizes are provided.



### 14.1. My Page

Desktop (a tablet in landscape mode will appear largely identical)

The screenshot shows the 'My Page' interface for user 'Fred Bloggs'. The page is organized into several sections:

- My Projects:** A table with columns for Project Name, Group, and Creation Date. It lists 'Library Information System', 'Sample Application One', and 'Sample Application Two'.
- My News Feeds:** A table with columns for Headline, Author, and Publish Date. It lists several news items from 'Inflectra'.
- My Saved Searches:** A table with columns for Name and Project. It lists searches like 'Critical Not-Covered Requirements', 'Failed Active Test Cases', etc.
- My Assigned Requirements:** A table with columns for Name, Project, Importance, and Status. It lists requirements like 'Ability to edit existing authors in the...'
- My Assigned Test Cases:** A table with columns for Name, Project, Status, and Last Executed. It lists test cases like 'Ability to create new book'.
- My Contacts:** A list of contacts with columns for Name, Department, Online, and Operations. It lists 'Joe P. Smith' and 'System Administrator'.
- My Assigned Incidents:** A table with columns for Name, Project, Type, Priority, and Date Opened. It lists incidents like 'Ability to associate multiple authors'.

## Table in portrait mode


Library Information System
Planning
Testing
Tracking
Reporting














My Page

My Page Fred Bloggs




### My Projects

Project Name	Group	Creation Date
<a href="#">Library Information System</a>	<a href="#">Internal Projects</a>	30-Nov-2005
<a href="#">Sample Application One</a>	<a href="#">Internal Projects</a>	30-Nov-2005
<a href="#">Sample Application Two</a>	<a href="#">External Projects</a>	30-Nov-2005



### My Saved Searches

Name	Project
 <a href="#">Critical Not-Covered Requirements</a>	Library Information System 
 <a href="#">Failed Active Test Cases</a>	Library Information System 
 <a href="#">All Reopened Incidents</a>	Library Information System 
 <a href="#">New Unassigned Incidents</a>	Library Information System 
 <a href="#">High Priority Late Tasks</a>	Library Information System 
 <a href="#">Not Executed Test Sets</a>	Library Information System 

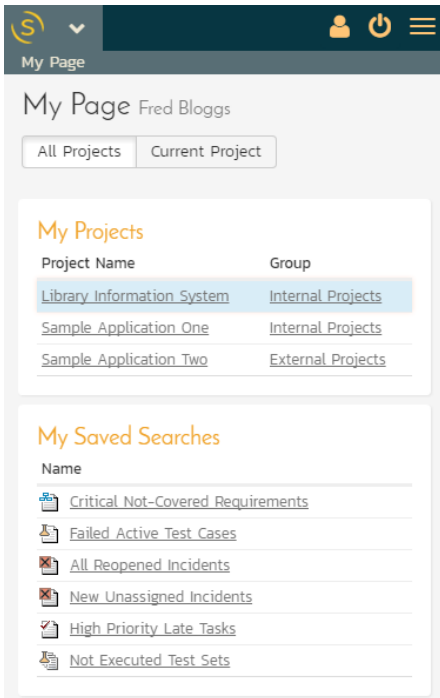
### My Assigned Requirements

Name	Project	Importance
 <a href="#">Ability to edit existing authors in the ...</a>	Library Information ...	2 - High
 <a href="#">Ability to create new users in the syste...</a>	Library Information ...	3 - Medium
 <a href="#">Ability to import from legacy system x</a>	Library Information ...	4 - Low

### My Assigned Test Cases

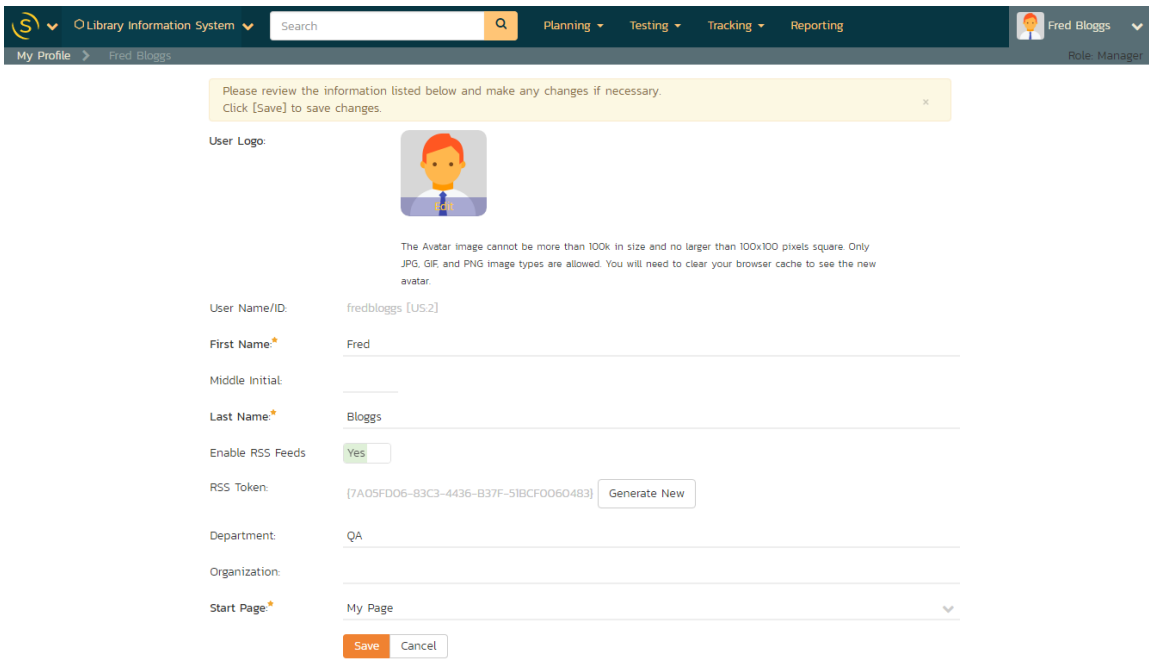
Name	Project	Status
 <a href="#">Ability to create new book</a>	Library Information ...	Passed 

## Smartphone in portrait mode




## 14.2. My Profile

Desktop (a tablet in landscape mode will appear largely identical)



Tablet in portrait mode

Please review the information listed below and make any changes if necessary. Click [Save] to save changes.

User Logo: 

The Avatar image cannot be more than 100k in size and no larger than 100x100 pixels square. Only JPG, GIF, and PNG image types are allowed. You will need to clear your browser cache to see the new avatar.

User Name/ID: fredbloggs [US:2]

First Name\*: Fred

Middle Initial: \_\_\_\_\_

Last Name\*: Bloggs

Enable RSS Feeds:  Yes

RSS Token: [7A05FD06-83C3-4436-B37F-51BCF0060483]

Department: QA

Organization: \_\_\_\_\_

Start Page\*: My Page

Smartphone in portrait mode

Please review the information listed below and make any changes if necessary. Click [Save] to save changes.

User Logo:



The Avatar image cannot be more than 100k in size and no larger than 100x100 pixels square. Only JPG, GIF, and PNG image types are allowed. You will need to clear your browser cache to see the new avatar.

User Name/ID: fredbloggs [US:2]

First Name\*: Fred

Middle Initial: \_\_\_\_\_

Last Name\*: Bloggs

Enable RSS Feeds  Yes

### 14.3. Example List Page

Desktop (a tablet in landscape mode will appear largely identical)

Library Information System | Search | Planning | Testing | Tracking | Reporting | Fred Bloggs

Requirements / Planning Board / Releases / Documents

Quick Filter: -- Show/hide columns --

Displaying 15 out of 35 requirement(s) for this project.

Name	Test Coverage	Progress	Status	Type	ID	Edit
Functional System Requirements	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	In Progress	Package	RQ.1	Edit
Online Library Management System	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	In Progress	Package	RQ.2	Edit
Book Management	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Package	RQ.3	Edit
Ability to add new books to the system	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.4	Edit
Ability to edit existing books in the system	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.5	Edit
Ability to delete existing books in the system	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.6	Edit
Ability to associate books with different subjects	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.7	Edit
Ability to associate books with different authors	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.8	Edit
Ability to associate books with different editions	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.9	Edit
Ability to completely erase all books stored in the system	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>	Developed	Feature	RQ.10	Edit
Edition Management	Not Covered	<div style="width: 100%; height: 10px; background-color: red;"></div>	In Progress	Package	RQ.11	Edit
Author Management	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	In Progress	Package	RQ.13	Edit
Subject Management	Not Covered	<div style="width: 100%; height: 10px; background-color: yellow;"></div>	In Progress	Package	RQ.19	Edit
Administration Functions	Not Covered	No Tasks	Accepted	Package	RQ.22	Edit
Use Cases	<div style="width: 100%; height: 10px; background-color: green;"></div>	No Tasks	Completed	Package	RQ.29	Edit

Show 15 rows per page | Displaying page 1 of 2

## Tablet in portrait mode

Requirements

+ Insert --- Show Level --- Filter

Displaying 15 out of 35 requirement(s) for this project.

Name	Test Coverage	Progress
Functional System Requirements	--- Any ---	--- Any ---
Online Library Management System		
Book Management		
Ability to add new books to the system		
Ability to edit existing books in the system		
Ability to delete existing books in the system		
Ability to associate books with different subjects		
Ability to associate books with different authors		
Ability to associate books with different editions		
Ability to completely erase all books stored in the system with one click		
Edition Management	Not Covered	
Author Management		
Subject Management	Not Covered	
Administration Functions	Not Covered	No Tasks
Use Cases		No Tasks

Show 15 rows per page

Displaying page 1 of 2

## Smartphone in portrait mode

Requirements

+ Insert --- Show Level --- Filter

Displaying 15 out of 35 requirement(s) for this project.

Name

Functional System Requirements

Online Library Management System

Book Management

Ability to add new books to the system

Ability to edit existing books in the system

Ability to delete existing books in the system

Ability to associate books with different subjects

Ability to associate books with different authors

Ability to associate books with different editions

Ability to completely erase all books stored in the system with one click

Edition Management

Author Management

Subject Management

Administration Functions

Use Cases

Showing 15 rows per page

Displaying page 1 of 2

## 14.4. Example Details Page

Desktop (a tablet in landscape mode will appear largely identical)

Library Information System

Search

Planning Testing Tracking Reporting

Fred Bloggs

Requirements Requirement Details Planning Board Releases Documents

Role: Manager

Back to Requirements List

Display: Current Filter

Save Clone Refresh Delete Tools Email Subscribe

### Ability to add new books to the system

Requirement [RQ-4] Type: Feature Status: Developed Operations

Overview Test Coverage Tasks Attachments History Associations

Releases	Properties	Dates and Times
Release: 10.0.0.0001	Importance: 1 - Critical	Creation Date: 11/30/2003 7:00:00 PM
Author: Fred Bloggs	Component: Book Management	Last Updated: 11/30/2003 7:00:00 PM
Owner: Joe P Smith	URL: http://www.libraries...	Estimate (points): 2.0 <span>16.0h</span>
	Difficulty: Moderate	Review Date: 7/3/2012
	Classification: --- Please Sele...	
	Ranking: 1	
	Decimal: 1234	

Detailed Information

The ability to add new books into the system, complete with ISBN, publisher and other related information

Show 15 rows

Tablet in portrait mode

## Ability to add new books to the system

Requirement [RQ-4] Type: Feature  
Status: Developed Operations

Overview

### Releases

Release: 1.0.0.0.0001 - Iteration 001

### People

Author: Fred Bloggs

Owner: Joe P Smith

### Properties

Importance: 1 - Critical

Component: Book Management

URL: http://www.libraries.org

Difficulty: Moderate

Classification: --- Please Select ---

Ranking: 1

Decimal: 1234

### Dates and Times

Creation Date: 11/30/2003 7:00:00 PM

Last Updated: 11/30/2003 7:00:00 PM

Estimate (points): 20 16.0h

Review Date: 7/3/2012

Smartphone in portrait mode



Requirements

← Save Clone Refresh

Email Subscribe

Ability to add new books to the system

Requirement [RQ:4]

Type: Feature

Status: Developed Operations

Overview

Releases

Release: 1.0.0.0001 - Iteration 001

People

Author: Fred Bloggs

Owner: Joe P Smith

Properties

Importance: 1 - Critical

Component: Book Management

URL: http://www.libraries.org

## 14.5. Test Execution

Desktop (a tablet in landscape mode will appear largely identical)

Internal Projects Library Information System Search Planning Testing Tracking Reporting Fred Bloggs

Test Cases Test Case Execution Test Sets Test Runs Automation Hosts

Display: Split Table Mini

Testing Cycle for Release 1.1 Release 1.1.0.0

Progress (0 / 45 Steps)

Step 1 User opens up Microsoft Ed

Step 2 User logs in to application

Step 3 User clicks link to report los

Step 4 User chooses lost book from

Step 5 User clicks submit button

Ability to create new book (TC 12)

Step 1 User opens up Microsoft Ed

Step 2 User logs in to application

Step 3 User clicks link to create bo

Step 4 User enters books name anc

Step 5 User chooses book's genre z

Step 6 User clicks submit button

Ability to edit existing book (TC 12)

Step 1 User opens up Microsoft Ed

Person loses book and needs to report loss (TC 12)

Step 1 User opens up Microsoft Edge and enters application URL: http://www.libraryinformationsystem.org

Expected Result: The browser loads the login web page

Sample Data: http://www.libraryinformationsystem.org

Actual Result Attachments Incidents

Format B I Tx

Tablet in portrait mode

Library Info... Planning Testing Tracking Reporting

Test Cases

### Testing Cycle for Release 1.1 Release 1.1.0.0

Display: Split Table

Progress (0 / 45 Steps)

- Step 1 User opens up Microsoft Edge and enters application URL: http://www.libraryinformationsystem.org
- Step 2 User logs in to application
- Step 3 User clicks link to report lost book
- Step 4 User chooses lost book from list
- Step 5 User clicks submit button

#### Ability to create new book

- Step 1 User opens up Microsoft Edge and enters application URL: http://www.libraryinformationsystem.org
- Step 2 User logs in to application
- Step 3 User clicks link to create book
- Step 4 User enters books name and author
- Step 5 User chooses book's genre and subject
- Step 6 User clicks submit button

#### Ability to edit existing book

- Step 1 User opens up Microsoft Edge and enters application URL: http://www.libraryinformationsystem.org
- Step 2 User logs in to application

Person loses book and needs to report loss (TC 12)

Step 1 User opens up Microsoft Edge and enters application URL: http://www.libraryinformationsystem.org

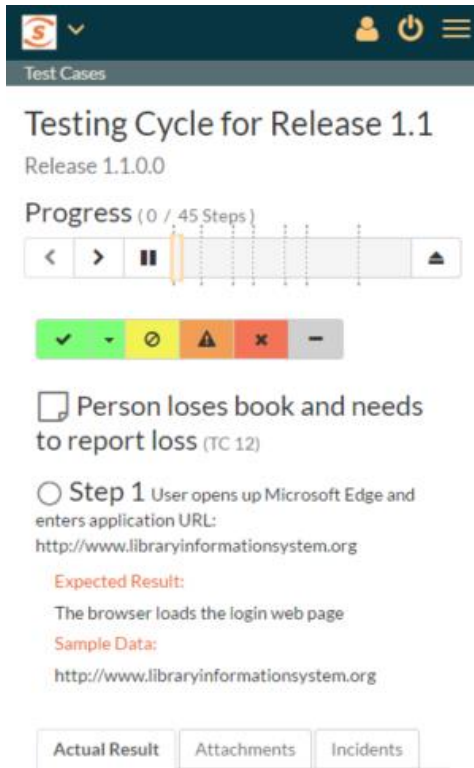
**Expected Result:**  
The browser loads the login web page

**Sample Data:**  
http://www.libraryinformationsystem.org

Actual Result Attachments Incidents

Format B I [bulleted list] [numbered list] [quote] [link] [image] [table]

Smartphone in portrait mode



## 15. Program Management

The program management features of SpiraPlan let you manage multiple projects as a single program. The features described in the section require that you are logged in as a user that has membership of the program (aka project group) in question. You can be either of the two project group roles (group owner or executive) to access these features. They can be accessed from the SpiraPlan program menu:



*Note: SpiraTest and SpiraTeam do not include these features.*

### 15.1. Program Planning Board

The program planning board is designed to let you view the backlog items that need to be planned for all of the projects in a specific project group (aka program) as well as view all of the planned items in each of the individual projects. It is designed to let you see a project-group wide view of all requirements and associated test cases and tasks. You can access this feature by clicking on the **Planning** menu entry in the program navigation.

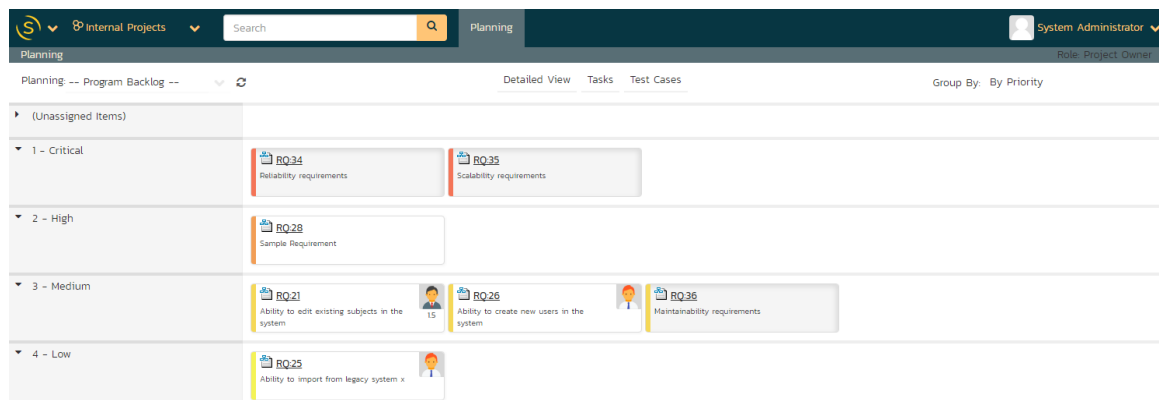
The project group planning board has the following views:

- Program Backlog
  - By Priority
  - By Status
- All Projects
  - By Project
  - By Priority
  - By Status
  - By Person
- Project
  - By Priority
  - By Status
  - By Person

Each of these views is described below:

#### 15.1.1. Program Backlog – by Priority

This view is designed to let you see the program backlog organized by requirement importance. Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).

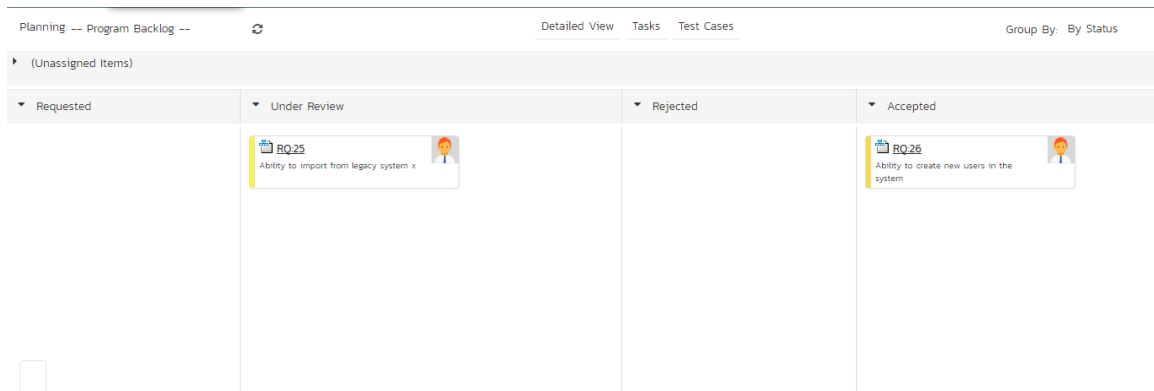


The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.

#### 15.1.2. Program Backlog – by Status

This view is designed to let you see the program backlog organized by requirement status. Each of the possible status values (for an unscheduled item) is displayed as a heading, with the backlog items

displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases). This view is commonly called a **Kanban** board:

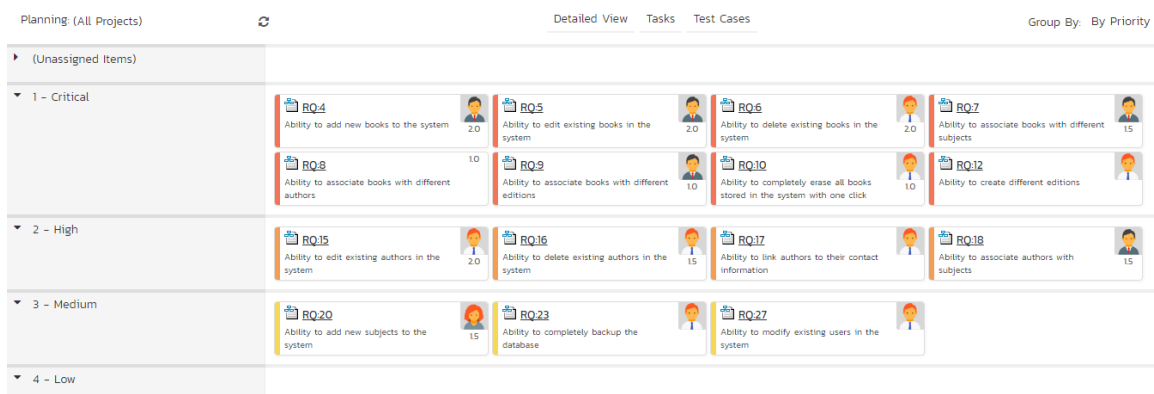


Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Requested > Accepted). Once a requirement is assigned to a release or iteration it will come automatically 'Planned' and not appear in this view. You can drag and drop the requirements between the different statuses.

### 15.1.3. All Projects – by Priority

This program planning view is designed to let you see all of the backlog items that have been scheduled for all of the projects in the current program, organized by requirement importance/priority.

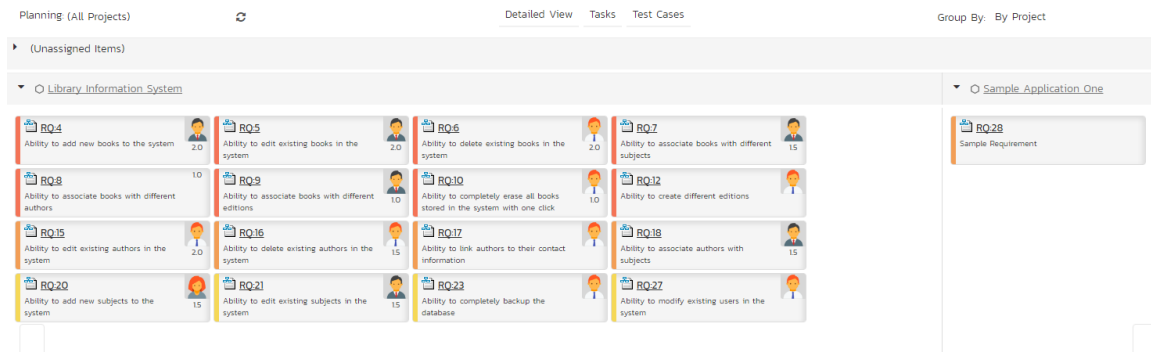
Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).



The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.

### 15.1.4. All Projects – by Project

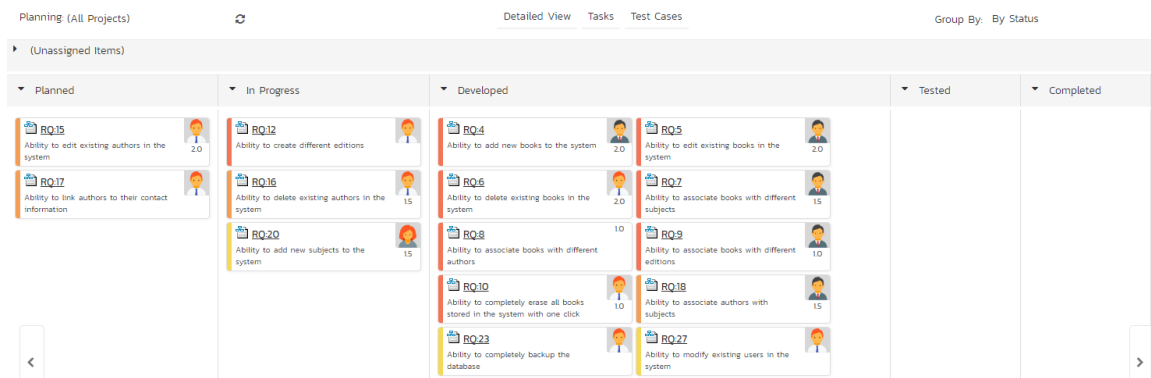
The program planning view is designed to let you view the open (not-completed) backlog items currently planned per project. The backlog items are themselves only requirements, however you can see the tasks and test cases associated with a specific requirement.



Clicking on the **project hyperlink** will switch the planning board into the 'Project Backlog' view described in section 13.5.4 below.

### 15.1.5. All Projects – by Status

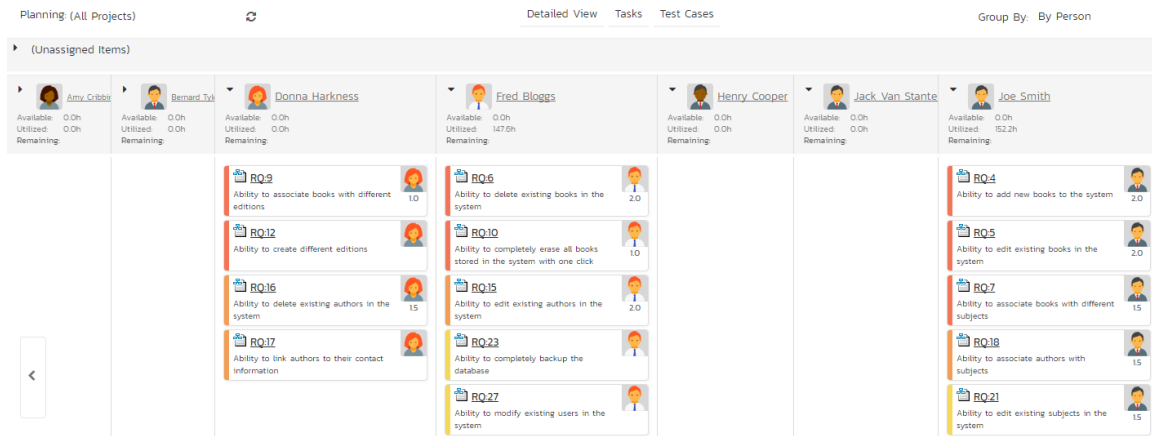
This view is designed to let you see the scheduled backlog items for the entire program organized by requirement status. Each of the possible status values (for a planned item) is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases). This view is commonly called a **Kanban** board:



Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Planned > Completed). You can click on the expand/collapse icons to hide any statuses that are not used. You can drag and drop the requirements between the different statuses. If you have the planning options enabled to have requirements status' automatically update based on changes to the associated tasks and test cases, then items will automatically move between the statuses based on tasks being completed and test cases being executed.

### 15.1.6. All Projects – by Person

This view is designed to let you see the program backlog organized by resource / person. Each of the users that is a member of any of the projects in the current program is displayed as a heading, with the backlog items displayed in the same column underneath.

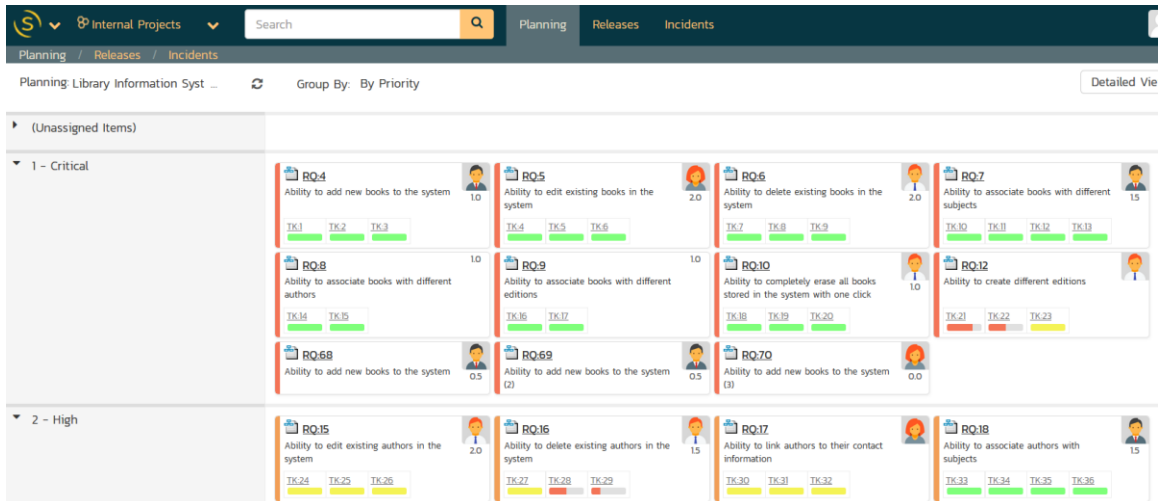


You can click on the expand/collapse icons to hide any resources that are not relevant. Above the resource headings there is a section called 'Unassigned Items'; that contains backlog items that are scheduled but have not yet been assigned to a person.

### 15.1.7. Project – by Priority

This program planning view is designed to let you see all of the backlog items that have been scheduled for all of the projects in the current program, organized by requirement importance/priority.

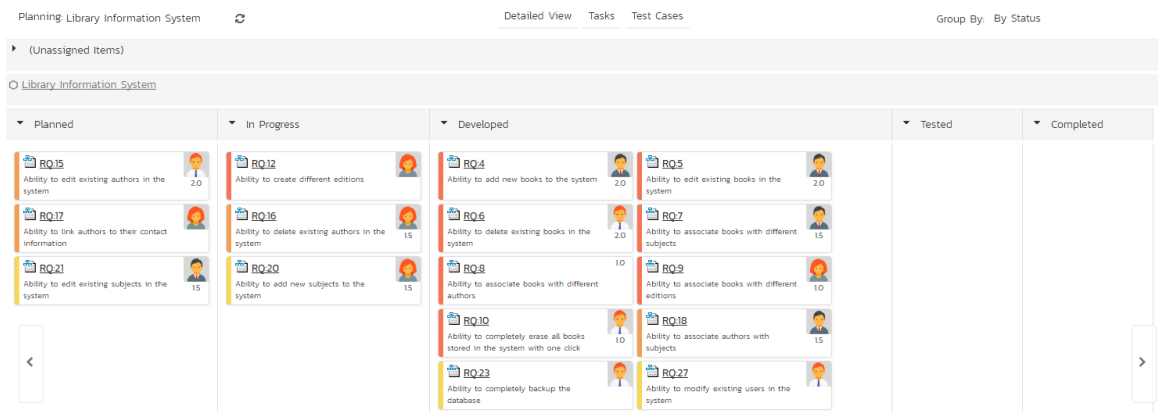
Each of the possible importance values is displayed on the left-hand side and the backlog items displayed in the same row on the right. The backlog items in this view will only be requirements (with associated tasks and test cases).



The top section will contain the list of items that are not assigned a priority, with the other sections containing the items that have been assigned to the specific priority.

### 15.1.8. Project – by Status

This view is designed to let you see the project backlog organized by requirement status. Each of the possible status values (for a planned item) is displayed as a heading, with the backlog items displayed in the same column underneath. The backlog items in this view will only be requirements (with associated tasks and test cases). This view is commonly called a **Kanban** board:



Each of the vertical sections is one of the requirements' statuses, in order of the requirement lifecycle (Planned > Completed). You can click on the expand/collapse icons to hide any statuses that are not used. You can drag and drop the requirements between the different statuses. If you have the planning options enabled to have requirements status' automatically update based on changes to the associated tasks and test cases, then items will automatically move between the statuses based on tasks being completed and test cases being executed.



### 15.1.9. Project – by Person

This view is designed to let you see the project backlog organized by resource / person. Each of the users that is a member of the current project is displayed as a heading, with the backlog items displayed in the same column underneath.

Planning: Library Information System    Detailed View    Tasks    Test Cases    Group By: By Person

(Unassigned Items)

Library Information System

RQ8  
Ability to associate books with different authors

Amy Cribbir    Bernard Ty    Donna Harkness    Fred Bloggs    Henry Cooper    Jack Van Stante    Joe Smith

Available: 0.0h    Utilized: 0.0h    Remaining: 0.0h

Available: 0.0h    Utilized: 147.5h    Remaining: 0.0h

Available: 0.0h    Utilized: 0.0h    Remaining: 0.0h

Available: 0.0h    Utilized: 0.0h    Remaining: 0.0h

Available: 0.0h    Utilized: 82.2h    Remaining: 0.0h

RQ9: Ability to associate books with different editions (10)

RQ12: Ability to create different editions (10)

RQ16: Ability to delete existing authors in the system (15)

RQ17: Ability to link authors to their contact information (10)

RQ6: Ability to delete existing books in the system (20)

RQ10: Ability to completely erase all books stored in the system with one click (10)

RQ15: Ability to edit existing authors in the system (2.0)

RQ23: Ability to completely backup the database (10)

RQ27: Ability to modify existing users in the system (10)

RQ4: Ability to add new books to the system (2.0)

RQ5: Ability to edit existing books in the system (2.0)

RQ7: Ability to associate books with different subjects (15)

RQ18: Ability to associate authors with subjects (15)

RQ21: Ability to edit existing subjects in the system (15)

You can click on the expand/collapse icons to hide any resources that are not relevant. Above the resource headings there is a section with the project name; that contains backlog items that are scheduled for the current project but have not yet been assigned to a person.

### 15.2. Program Release Plan

The program release plan lets you see all of the projects in the current program, together with their releases, iterations, and phases displayed in an integrated hierarchical view:

Internal Projects    Search    Planning    Releases    Incidents    System

Refresh    Show Level    Filter    Show/hide columns

Displaying 14 out of 41 release(s) for this program.

Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID
Library.Backoffice System										RL
Library System Release 1	10.0.0			29-Feb-2004	11-Mar-2004	216.0h	102.0h	Major Release	Completed	RL37
Library System Release 1.SP1	10.1.0		No Tasks	12-Mar-2004	29-Mar-2004	176.0h		Minor Release	Completed	RL38
Library System Release 1.SP2	10.2.0		No Tasks	31-Mar-2004	29-Apr-2004	352.0h		Minor Release	Completed	RL42
Iteration_001	10.0.0.0001			29-Feb-2004	3-Mar-2004	96.0h	40.0h	Iteration	Completed	RL46
Iteration_002	10.0.0.0002			4-Mar-2004	7-Mar-2004	24.0h	32.0h	Iteration	Completed	RL47
Iteration_003	10.0.0.0003			8-Mar-2004	11-Mar-2004	72.0h	30.0h	Iteration	Completed	RL48
Library System Release 1.1	11.0.0			14-Oct-2004	26-Oct-2004	168.0h	104.0h	Major Release	In Progress	RL49
Library System Release 2005	12.0.0			31-Mar-2005	1-Apr-2005	16.0h	10.0h	Major Release	Planned	RL55
Library Information System										
Library System Release 1	10.0.0			29-Feb-2004	11-Mar-2004	216.0h	102.3h	Major Release	Completed	RL1
Library System Release 1.1	11.0.0			14-Oct-2004	26-Oct-2004	168.0h	86.9h	Major Release	In Progress	RL4
Library System Release 2005	12.0.0			31-Mar-2005	1-Apr-2005	16.0h	10.0h	Major Release	Planned	RL6
Sample Application One										

You can access this feature by clicking on the **Releases** menu entry in the program navigation.

This view lets you see all the releases, iterations, and phases with their dates, test coverage, progress and estimated/projected estimates. You can expand and collapse the projects and releases to display the appropriate level of detail as well as filter by the various fields in the grid.

### 15.3. Program Incident List

The program incident list lets you see all of the incidents (bugs, enhancements, issues, risks, etc.) in the current program, displayed in an integrated table view. This view projects program managers with the ability to see their incidents' progress, dates, priorities, and other important fields:

Internal Projects Search Planning Releases Incidents System Administrator

Refresh Filter Show/hide columns

Displaying 16 - 30 out of 61 incident(s) for this program.

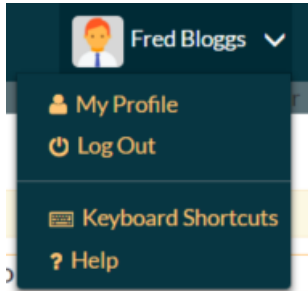
Name	Type	Status	Priority	Detected By	Creation Date	Owner	Progress	ID	Project ID
Ability to generate customized reports	Enhancement	Resolved	1 - Critical	Joe P Smith	24-Nov-2003	Joe P Smith	<div style="width: 100%; background-color: green;"></div>	IN25	Library Information System
Ability to associate multiple authors	Enhancement	Duplicate	1 - Critical	Fred Bloggs	24-Nov-2003		<div style="width: 0%; background-color: green;"></div>	IN29	Library Information System
Section 508 compliance	Issue	Closed	1 - Critical	Fred Bloggs	1-Dec-2003	Joe P Smith	<div style="width: 100%; background-color: green;"></div>	IN35	Library Information System
Test Training Item	Training	Assigned	1 - Critical	Fred Bloggs	2-Dec-2003	Fred Bloggs	<div style="width: 25%; background-color: green;"></div>	IN40	Library Information System
Test System Limitation	Limitation	Open	1 - Critical	Fred Bloggs	3-Dec-2003		<div style="width: 0%; background-color: green;"></div>	IN45	Library Information System
Test System Limitation	Limitation	Assigned	1 - Critical	Joe P Smith	3-Dec-2003	Fred Bloggs	<div style="width: 100%; background-color: green;"></div>	IN46	Library Information System
Test System Limitation	Limitation	Duplicate	1 - Critical	Joe P Smith	4-Dec-2003	Fred Bloggs	<div style="width: 0%; background-color: green;"></div>	IN50	Library Information System
Test Change Request	Change Request	Closed	1 - Critical	Fred Bloggs	7-Dec-2003	Joe P Smith	<div style="width: 100%; background-color: green;"></div>	IN55	Library Information System
Cannot log into the application	Incident	New	1 - Critical	Fred Bloggs	9-Dec-2003		<div style="width: 0%; background-color: green;"></div>	IN58	Sample Application One
Sample Risk 1	Risk	Open	1 - Critical	Fred Bloggs	9-Dec-2003		<div style="width: 0%; background-color: green;"></div>	IN59	Library Information System
Editing the date on a book is clunky	Bug	Assigned	2 - High	Joe P Smith	3-Nov-2003	Fred Bloggs	<div style="width: 50%; background-color: green;"></div>	IN8	Library Information System
Quote handling issues throughout	Bug	Resolved	2 - High	Fred Bloggs	14-Nov-2003	Fred Bloggs	<div style="width: 100%; background-color: green;"></div>	IN12	Library Information System
The homepage hangs whilst loading	Bug	Not Reproducible	2 - High	Joe P Smith	14-Nov-2003	Fred Bloggs	<div style="width: 25%; background-color: green;"></div>	IN16	Library Information System
Support for IBM DB2	Enhancement	Open	2 - High	Fred Bloggs	16-Nov-2003		<div style="width: 0%; background-color: green;"></div>	IN19	Library Information System
Integration of security with NTLM/PKI	Enhancement	Assigned	2 - High	Joe P Smith	17-Nov-2003	Joe P Smith	<div style="width: 25%; background-color: green;"></div>	IN22	Library Information System

You can access this feature by clicking on the **Incidents** menu entry in the program navigation. You can filter and sort by specific project, or by the various fields displayed in the table.

## Appendix 1: Keyboard Shortcuts

SpiraTeam® includes an array of keyboard shortcuts to speed up navigation and use of the application. All functionality can be performed using a mouse and clicking and therefore using a keyboard shortcut is never required. However, keyboard shortcuts can be an efficient way of performing common tasks. A list of the keyboard shortcuts and what they do is available throughout the application in two ways:

- Via the user profile action menu



- By typing “?” anywhere in the application (not when the cursor is in a text field). For example, on Windows machines typing shift and the ? key together.

There are two main ways of using the shortcuts: either pressing a key or key(s) at the same time (indicated by a single key or “a + b”); or pressing a number of keys in succession as with normal typing (indicated by “a ... b”). The popup menu explaining the shortcuts is illustrated below (please note that the keyboard shortcuts displayed will vary depending on the current page:

## Keyboard Shortcut Reference

### Site Wide Navigation

Access to pages varies by user and project

- n ... 1** Go to My Page
- n ... 2** Go to Project Group Home
- n ... 3** Go to Project Home

- n ... r ... q** Go to Requirements
- n ... p ... b** Go to Planning Board
- n ... r ... l** Go to Releases
- n ... d ... c** Go to Documents

- n ... t ... c** Go to Test Cases
- n ... t ... s** Go to Test Sets
- n ... t ... r** Go to Test Runs
- n ... a ... h** Go to Automation Hosts

- n ... i ... n** Go to Incidents
- n ... t ... k** Go to Tasks
- n ... u ... s** Go to Resources
- n ... s ... c** Go to Source Code

- n ... r ... p** Go to Reporting
- n ... 0** Go to User Profile
- n ... a ... d** Go to Administration

## List Page Shortcuts

- shift + x** Toggle keyboard navigation of the list table
- x** Toggle current row marked row as checked
- j** Go to next row
- k** Go to previous row
- enter** Open selected item
- shift + enter** Open selected item in new browser window

## Details Page Shortcuts

- k** Go to next tab
- j** Go to previous tab

## Test Execution Shortcuts

### Change the Display

- d ... 1** Show Split View
- d ... 2** Show Table View
- d ... 3** Show Mini View
- d ... j** Select the left sub view
- d ... k** Select the right sub view
- d ... c** Toggle always showing test run details

### Switch Tabs in the Inspector

- d ... r** Switch to the Actual Results Tab
- d ... a** Switch to the Attachments Tab
- d ... i** Switch to the Incidents Tab

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