TestCaseDB Quick Start Guide

TestCaseDB

Version 3.0

1 Table of Contents

2 Quick Start Guide

This document is intended to get new users up and running with TestCaseDB. Reading this document provides enough background for users to use the main features of the application.

2.1 Log in

1. Open TestCaseDB in your browser.
2. Log in with your username/password. For the first login, use the default user 'admin' with the password 'ChangeMe'.

2.1.1 Change the Password

If the default user and password were used, change the password at this point.

1. Click the My Settings link.
2. On the My Settings page, enter your new password in the Password and Password Confirmation fields.
3. Click the Update User button

2.2 Create Users

1. Log into the system as an administrator.
2. Expand the Admin group in the navigation bar.
3. Click the Users link.
4. Click the New User button.
5. Fill out all of the fields on the form. For details on the different roles, see Section 6, Appendix A: User Roles.
6. Click the Active button to activate the user (only active users are counted against the system license).

7. Select which products the user has access to in the Authorized Products section.
8. Click the Create User button.

2.3 Deactivate a User

When a user no longer needs to be able to log in to your system their account should be deactivated.

1. Log into the system as an administrator.
2. Expand the Admin group in the navigation bar.
3. Click the Users link.
4. Click the Edit button for the user.
5. Deselect the activate check box.
6. Click the Update User button.

3 Prepare the system

At this point you should create the main entities that all test cases, plans and results will be related to. These entities include Products, Categories, Test Types and Versions.

3.1 Create Test Types

By default, the system includes test types *Manual* and *Automatic*. If you desire different types, follow these steps.

1. Log into TestCaseDB as an administrator.
2. Expand the Admin group in the navigation bar.
3. Click the Test Types link.
4. Click the New Test Type button.
5. Give the type a name.
6. If desired, enter a description for the test type.
7. Click Create Test type.
8. The new test type is displayed. Click the back button to return to the list.
9. Repeat steps 4 – 8 as many times as desired.

3.2 Create Products

Entries for different products can be created using the steps in this section.

1. Log into TestCaseDB as an administrator.
2. In the top right corner, click the Admin link.
3. Click the Product link.
4. Click the New Product button.
5. Enter the name of the product.
6. If desired, enter a description for the product.
7. Click Create Product.

8. The new product is displayed. Click the back button to return to the list.
9. Repeat steps 4 – 8 as many times as desired.

3.3 Authorize Users for New Products

Users can only access products that they have access to. Use these steps to authorize multiple users for a single product.

1. Log into TestCaseDB as an administrator or QA manager (the manager must have access to the product).
2. Click the Admin dropdown in the navigation bar.
3. Click the Product link.
4. Click the Edit link for the product that you want to authorize users to use.
5. In the Authorized Users section, select all the users that you want to grant access to.
6. Click the Update Product button.

3.4 Create Categories

Categories need to be created for each Product that was added to the system. Careful thought should be given to this step as it will define how your test cases are organized. Sample categories are provided in the screenshot below to give ideas on how test cases can be organized into categories, but customers should not feel limited to this kind of organization.

3.4.1 Example Category Setups

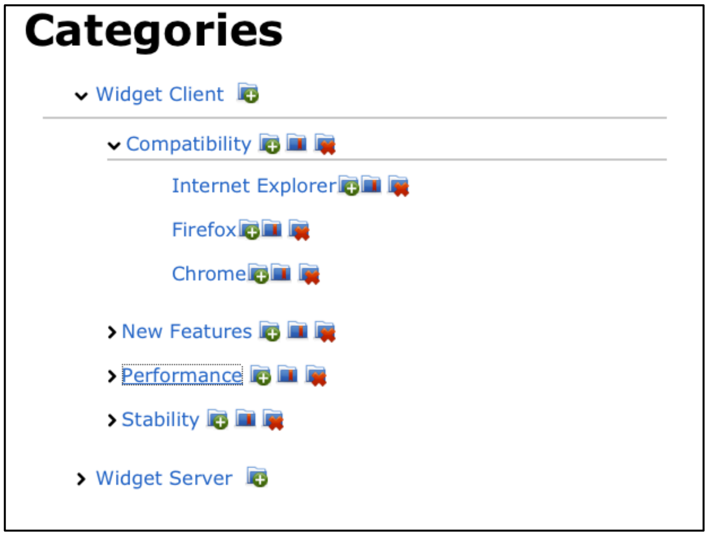

Figure 1 - Sample categories

3.4.2 Configuring Categories

1. Log into TestCaseDB as an administrator.
2. Click the Admin dropdown in the navigation bar.
3. Click the Category link.
    - The category page loads. Initially, a list of products is displayed. Clicking on a product name or category name will display the list of sub-categories.
4. To add a category to a product or a sub-category to an existing category, click the  icon beside the existing product or category.
5. Enter a name for the category in the name field and then click Create Category.
    - If the list for the existing item had already been expanded, the new item will be added to the list. If the list is not visible, the new item will appear when the list is expanded by the user.
6. Repeat steps 4 and 5 to create all desired categories.

3.5 Create Tags

In addition to categories, tags can be used to classify test cases. Unlike categories, tags are optional and test cases can have zero, one or multiple tags. QA teams can use tags in anyway they see fit. One common use is indicating applicable platforms for test cases. For example, if you are testing a mobile application, your tags could be a list of mobile operating systems and browsers.

Instructions for creating tags are given below.

1. Log into TestCaseDB as an administrator.
2. Click the Admin dropdown in the navigation bar.
3. Click the Tags link.
4. Click the New Tag button.
5. Give the tag a name.
6. Click Create Tag.
7. Repeat steps 3 – 6 as many times as desired.

3.6 Create Versions

Each product has a unique set of versions. Assignments and results are tracked against versions. Initial versions can be created early on and users will continuously add new versions to the system to correspond with new versions of your software using the steps below.

1. Log into TestCaseDB as an administrator.
2. Click the Admin dropdown in the navigation bar.
3. Click the Versions link.
4. Click the New Versions button.
5. Select a product that this version will belong to.
6. Enter a version in the version field.
7. Optionally, add a description.
8. Click the Create Version button.

Devices serve two purposes in TestCaseDB. Devices are used by the scheduler in order to provide separate queues for different resources. For use with automation, more information is available in the automation section.

Devices can also be used to indicate what resources, software or other item a test plan should be run against when it is used in a test plan. It is easy to provide these details using device custom fields.

Instructions for creating devices are given below.

1. Log into TestCaseDB as an administrator.
2. Click the Admin dropdown in the navigation bar.
3. Click the Devices link.
4. Click the New Device button.
5. Give the tag a name and description. A detail name is recommended, as this is how stencils will refer to the device.
6. If this device will be used as an automation queue set the active field.
7. Fill out the custom fields.
8. Click Create Device.
9. Repeat steps 4 – 8 as many times as required.

3.7 Create Devices

Devices serve two purposes in TestCaseDB:

1) The scheduler is able to provide separate queues for different resources. For use with automation, more information is available in the automation section.

2) They help indicate what resources; software or other item a test plan should be run against when it is used in a test plan. It is easy to provide these details using device custom fields.

Instructions for creating devices are given below.

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4. Click the New Device button.
5. Give the tag a name and description. A detailed name is recommended, as this is how stencils will refer to the device.
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7. Fill out the custom fields.
8. Click Create Device.
9. Repeat steps 4 – 8 as many times as required.

4 Create Test Cases and Plans

4.1 Create Test Cases

Test cases can be entered into the system manually using forms or they can be imported into the application from XLS spreadsheets. Instructions for both methods are provided in this section.

4.1.1 Creating Test Cases in TestCaseDB Using Forms

To create test cases in the application follow these steps.

1. Log into TestCaseDB.
2. Click the Test Cases link in the header and then List.
3. Clicking on Product and category names, navigate to the category you would like to add the case to.
4. Click the icon beside the category that you would like to add the test case to.
5. Fill in all of the fields on the test case form.
6. Create the steps for the test case.
    a. To add additional steps, use the Add Step button in the steps section.
    b. Use the delete button to remove unwanted steps.
    c. Re-order steps by clicking and dragging the icon.
7. Save the changes. There are two options for saving the changes.
    a. Click the Create Test Case button to save the changes and view the case.
    b. Click the Save and Create Additional button which will save the changes to this test case and open a new test case. The product and category on the new test case will match this test case.

4.1.2 Import Test Cases into TestCaseDB Using XLS

To import test cases into TestCaseDB follow the simple steps below.

1. Log into TestCaseDB.
2. Click the Test Cases link in the header and then click List.
3. Click the Import Test Cases button.
4. On the import page, download the sample spreadsheet.
5. Fill out the spreadsheet following the rules in section 4.1.2.1, Rules for importing test cases below.
6. If you closed the import page, re-open it.
7. Select a Product for the test cases.
8. Select a category for the test cases.
9. Select the file to download in the file section.
10. Click Import Test Cases.

4.1.2.1 Rules for Importing Test Cases

The rules for XLS test case imports are below. Reference Figure 2 for a sample spreadsheet.

1. The XLS file must include the header line.
2. Test Cases are defined on lines that include values for the Test Case Name, Description, Type and Step. Values entered for Result are optional.
3. Lines with only Step and optionally the result value are considered additional steps for the previous test case.
4. All of the test cases in a single file can only be downloaded to a single category.
5. Content must be placed on the first worksheet of the spreadsheet.

	A	B	C	D	E
1	**Test Case Name**	**Description**	**Type**	**Step**	**Result**
2	Sample Case 1	This is the first downloaded case	Manual	Step 1	
3				Step 2	Result 2 for case 1
4	Sample Case 2	This is another sample case	Manual	Step for case 2	Result for case 2
5				Second step for case 2	Second result for case 2
6				Third step for case 2	Third result for case 2
7				Fourth step with no result	
8				Fifth step for case 2	The fifth result for case 2

Figure 2 - Sample test case import file

4.2 Organize Test Cases into Test Plans

Test plans are collections of test cases that should be executed together. Test cases belong to a single product, but they may contain test cases from other products.

4.2.1 Create a Test Plan

Test plans can be created by following the steps below.

1. Log into TestCaseDB.
2. Click the Test Plan link in the header and then click List.
3. Click the New Test Plan button.
4. Fill in all fields on the test plan form.
5. At this point you can click Create Test plan which will show you the created test plan or you can click Save and Add Test Cases which will take you to a page that will allow you to add more test cases right away.

4.2.2 Adding Test Cases to Test Plans

1. Open the edit view of the test plan if it is not already open.
2. Browse the Available Test Cases section by clicking on the product and category names.
3. To add a test case to a plan, click the Add Case link. The case will be added to the list above and removed from the available cases list.
4. Repeat 2 and 3 until completed.
5. Cases are organized in the order they are added. If they need to be re-ordered drag and drop them by clicking and dragging the steps using the icon.
6. Click the Update Test Plan button to save all changes.

4.3 Locking and Versioning

TestCaseDB allows you to lock test cases and test plans once they have been executed and assigned. This prevents changes to test cases which allows for more accurate tracking.

However, it is possible that test cases may need to change over time. To deal with this feature, new versions of test cases and plans can be made.

4.3.1 Configuring Locking

If your team requires locking of test cases once they have been executed follow these steps.

1. Log in as an administrator.
2. Expand the Admin group in the navigation bar.
3. Click the Settings link.
4. Click the Edit link for “Allow Test Case Edit After Execution”.
5. Click the enabled checkbox to remove the checkmark.
6. Click the Update Setting button.

If your team requires locking of test plans once they have been assigned for execution follow these steps.

1. Login as an administrator.
2. Expand the Admin group in the navigation bar.
3. Click the Settings link.
4. Click the Edit link for “Allow Test Plan Edit After Assignment”.
5. Click the enabled checkbox to remove the checkmark.
6. Click the Update Setting button.

4.3.2 Versioning

To create a new version of a test case, open the test case in the browser and click New Version. The new version will be created and will contain the items below.

- Identical name
- The new test case’s version will incremented by one
- The initial case will be set to deprecated
- All other values with the exception of comments will be copied to the new test case.

Note that when you view your deprecated test case in list views, the name of the test case will have a line through it to indicate that it is a deprecated version.

To create a new version of a test plan, open the test plan and click New Version.

4.3.3 Versioning vs. Copying

In addition to creating new versions of test cases and test plans, you can copy test cases and test plans.

The major difference is that a copied plan or case is not linked to the original. For copied items, the version is set to 1, the name is changed to include COPY, and the remaining items are copied except for comments.

5 Assign, Execute and Monitor Testing Progress

5.1 Assign and Execute a Test Plan

An assignment must be created for a tester to execute a test plan.

An assignment links the test plan to a product, version and user that will execute.

Steps to assign a test plan.

1. If a version has not been created for this run, do it now.
2. Click the Test Assignments link and then click List.
3. Click the New Assignment button.
4. Select a product, version and test plan.
5. Add any notes applicable for this run.
6. In the task components select the user that will execute the test plan and set the due date.
7. Click the Create Assignment button.

Notes:

- When the assignment is created, a task is automatically created for the user and it appears on their home page when they log in.
- An email is sent to the user so that they know that they have a pending task.

5.2 Executing an Assignment

1. Log into TestCaseDB
2. Click the Test Assignments item in the navigation bar and then click Execute.
3. Click the Execute link for the assignment you will be executing.
4. Click the Execute button for the test case you want to execute.
5. Follow the steps in the test case.

6. If you have an attachment to add, use the Add Attachment link now.
7. Set the Result for the test cases and any other required details.
8. Click Save and Execute Next to run the next test case in the test plan.

5.3 View Reports

There are several kinds of reports in the application. To create and run a report, follow the steps below. If you need more details on the different report types, read Section 7, Appendix B, Report Types. Users should note that they can only see and run the reports that they create.

1. Log into TestCaseDB.
2. Click the Reports link and then click List.
3. If the desired report exists, click its Run link. Otherwise, continue to step 4.
4. Click the New Report link.
5. Select the report type.
    - Based on the selected report type, different options will be displayed. Fill out the fields as required.
6. Click Create Report.
7. Click the Run link.

6 Appendix A: User Roles

The following user roles are available in TestCaseDB.

- Administrator
- QA Manager
- Senior Tester
- Tester
- Developer
- API User

All users count against the licensed number of users except for Developer accounts. A system may have an unlimited number of developer accounts and one API User.

6.1 Permissions

Each role has the following permissions.

Feature	Administrator	QA Manager	Senior Tester	Tester	Developer	API User
Test Cases	All	All	All	Create, Update, Read, Comment	Read, Comment	-
Test Plans	All	All	All	Create, Update, Read, Comment	Read, Comment	-
Assignments	All	All	Create, Read, Execute	Read, Execute	Read	-
Tasks	All	All	Create, Update, Read	Create, Update, Read	Create, Update, Read	-
Reports	All	All	All	-	-	-
Products, Test Types, Versions, Cateogries, Tags	All	All	-	-	-	-
User Settings	All	-	-	-	-	-
Uploads	All	All	Upload, Download, delete	Upload, Download	Upload, Download	-

7 Appendix B: Report Types

TestCaseDB includes several report types. Details for each report type are below.

7.1 System Status

The system status report does not have any additional parameters. The report informs the user of the total number of products, categories, test cases and results in the system.

7.2 Release Current State

The release current state report uses two parameters. The parameters are a product and version. The report looks for all assignments related to a product and version and then shows the number of test cases. The cases are broken down into the number that have passed, failed, marked as blocked and ones that have not been run. The output is displayed in a pie graph.

7.3 Release Current State – By User

The release current state by user report uses two parameters. The parameters are a product and version. The report looks for all assignments related to a product and version breaks down the results per user. The cases are broken down into the number that have passed, failed, marked as blocked and ones that have not been run. The output is in a table with each line representing a user.

Note that this report puts a lot of stress on the database. If you want an overall summary of work for a current release, the release current state report is recommended.

7.4 Release Progress – Daily

The release progress – daily report uses four parameters, product, version, start date and end date. The start date and end date are optional. If the two items are not entered, TestCaseDB will automatically find and populate the start and end dates. The report looks for all assignments related to a product and version. It then charts testing status over the course of the start and end date in a graph that shows the cumulative results of each day.

7.5 Compare Release Results

The compare release results report uses one parameter, product. The report calculates the result for all versions of a product and displays them in a bar graph. This is useful for comparing versions to see how much testing was done and if quality is improving.

7.6 Test Cases without Steps

The test cases without steps report utilizes a single parameter, a product and is optional. The report generates a list of test cases that do not have steps. If a product is specified in the report, only test cases from that product are listed.

7.7 Open Tasks

The open tasks report does not have any parameters. The report generates a list of all tasks that are not in the closed state. The list includes the assignee, status, task name and due date.

7.8 Release Bug Report

The release bug report requires two parameters, a product and version. The report generates a list of all bugs found during a release. If TestCaseDB is configured to integrate with your bug system, it will also display the current status of the bugs.