CAT 4.14 User Manual
- Introduction -

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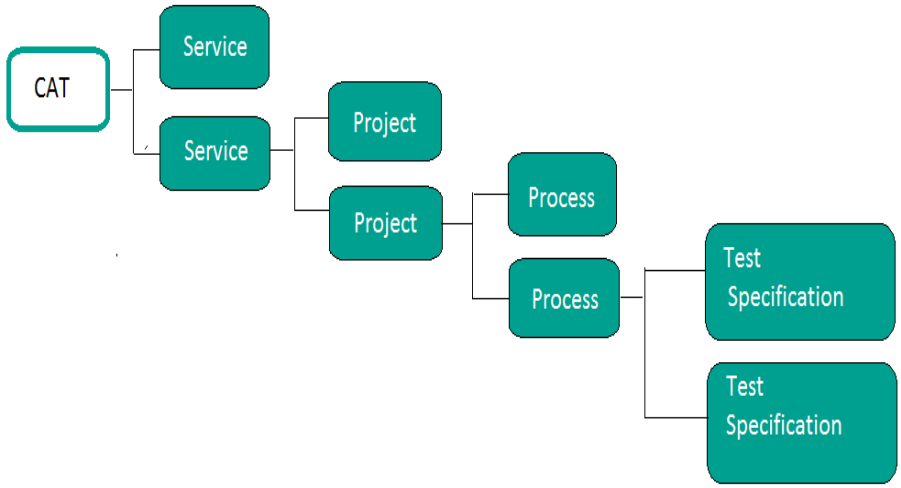
Chapter 1 Introduction

1.1. CAT Basic Information

CAT manages data with the following structure.



Service, project, and process are important units in the hierarchy of CAT data management. The service refers to the developed product or service. The users can create a project in the service to manage test specifications, tasks and etc. Besides, if there are already some processes in the project, users can separate the project by periods to manage test specifications, bugs and etc.

The management levels for setting items are as below, and contents in the higher level can be used in the lower level.

Upper Lower
System Settings> Service Settings> Project Settings

The following table shows the setting items of each level.

Level	Setting Items	Remarks
System Setting	User Setting	Create users and set up passwords.
	Issue setting	Manage types, status and set up the common fields for each service and project.
	Others	Set up the department and the access authentication.
Service Setting	Basic Setting	Set up customer fields such as product functions and test categories that can be added to the test suite.
	Header Template Setting	Create a template when making the test suite.
	Version Setting	Set up the overview for product versions.
	Issue templates Setting	Set up the issue template that can be automatically loaded when creating a new project.
Project Setting	Project Information	Set up the project period, process and teams.
	Project Detail Information	Set up the detailed information such as test object, the number of functions and arranged working hours.
	Issue Setting	Set up issues related to this project.
	Build Version Management	Build and control different project versions for managing the content changes.
	Edit ExtBTS	Connect to the issue management tool created by the third party company.
	Test Environment Setting	Register the environment for testing.

1.2. User Management

1.2.1. User Roles

There are four kinds of user authority in CAT and the available functions are as below.

Level	Function	Employee (Administrator)	Employee	Partner Company	Client
System	User Management	●			
System	Access Management	●			
System	Issue Setting	●			
System	Department Management	●	●		
System	Rank and Working place Setting	●	●		
Service	Create Service	●			
Service	Edit Service	●	●*1		
Project	Create Project	●	●*2		
Project	Edit Project	●	●*3		
Project	Test case management Test execution Progress management	●	●*3	●*3	
Project	Browsing the project Browsing and Analyzing issues	●	●*3	●*3	●*3

* 1: It's only possible to edit (register or delete) the service that projects with members belong to.

* 2: It's possible to create the project under the service that projects with members belong to.

* 3: These functions can be used in projects registered by users.

1.3. Management of Issues

With CAT, Users can manage issues by selecting their fields and status displayed. In addition, it's possible to set up three kinds of setting: System Setting, Service Setting, and Project Setting.

This chapter illustrates issues related types, status, and fields as well as the level structure of setting.

1.3.1.Issue Type, Status, and Field

Issue type

It's possible for users to manage issues by various kinds of type which fits the needs of the application.

[Initial types]

The following three default issue types are available at the beginning.

Classification	Overview
Bug	It is used to manage software bugs.
Request	It is used to manage software related requests.
Inquiry	It is used to manage software related inquiries.

Issue status

It's possible to utilize the issue management by setting up issue's status like create, edit and delete it through "Setting" → "Issue Management" → "Status Management". The created status can be assigned and used for each type in the project setting.

[Initial status]

Status	Status Type	Description
New	New	The default status when registering a new issue.
Under Process	Under Process	The in charge is handling now.
Fixed	Under Process	The issue was fixed.
Confirmed Fix	Under Process	The fix was confirmed.
Reopen	Under Process	The issue was not properly fixed.
Unable to Reproduce	Under Process	Waiting for the reappearance of the bug.
Postpone	Completed	The issue was scheduled to be fixed later.
Hold	Under Process	The issue is on hold

End	Completed	The issue was closed.

[Type of status]

The following three default status types are available at the beginning.

Status Type	Description
New	It's a type of the newly discovered and unhandled bugs.
Under Process	The type for issues under process.
Fixed	For those issues completed handling.

* It will be counted as the ended issue if the status was set as the end for each function.

Field of assignment

Users can set and use the issue field as their wish by creating, editing and deleting the field through "Settings" →" Issue Management "→"Custom Field Management". It's possible to set up fields using by the type through "Issue Management" → "Issue Type Management" in system settings.

[Type of field]

Field Type	Description
System field	It is a field preinstalled in the system. ※ Applicable to those with ID less than 1000.
Customer field	It is a field that can be set as user's wishes. ※Applicable to those with ID equals or higher than1000.

Please set up following fields as the default and add, modify and delete them if necessary when creating the new issue type.

[Initial Field]

Field	Description
Priority	Setting the priority.
Severity	Setting the severity.
Developer	The developer in charge of fixing this bug.
Environment dependency	Describe environment dependency.
Feature	Will use it when setting up the feature.
Due date	Will use it when setting up the due date.
Reproducible Step	The procedures that can reappear the bug.
Reproducible	Record if it's possible to reappear the bug.
Environment	Record the environment that the bug appear in.
Assignee	The person who in charge of the case.
Reporter	The reporter who found the bug.
Occurred version	The version which the bug appears in.
Release version	The version that the fix will be included.
Attachment	For attaching the file for reference.

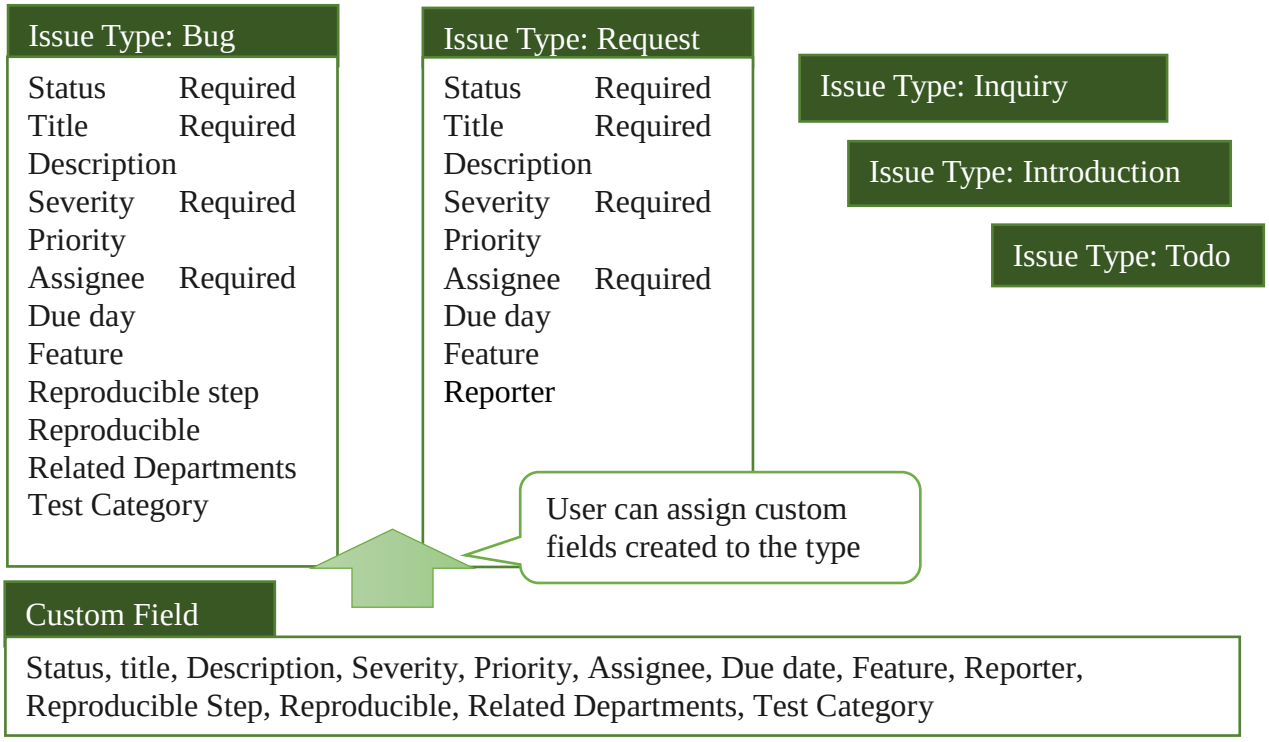
1.3.2.Structure of Issue Management

The user can customize the fields with flexibility by setting and managing the CAT based on the following structure.

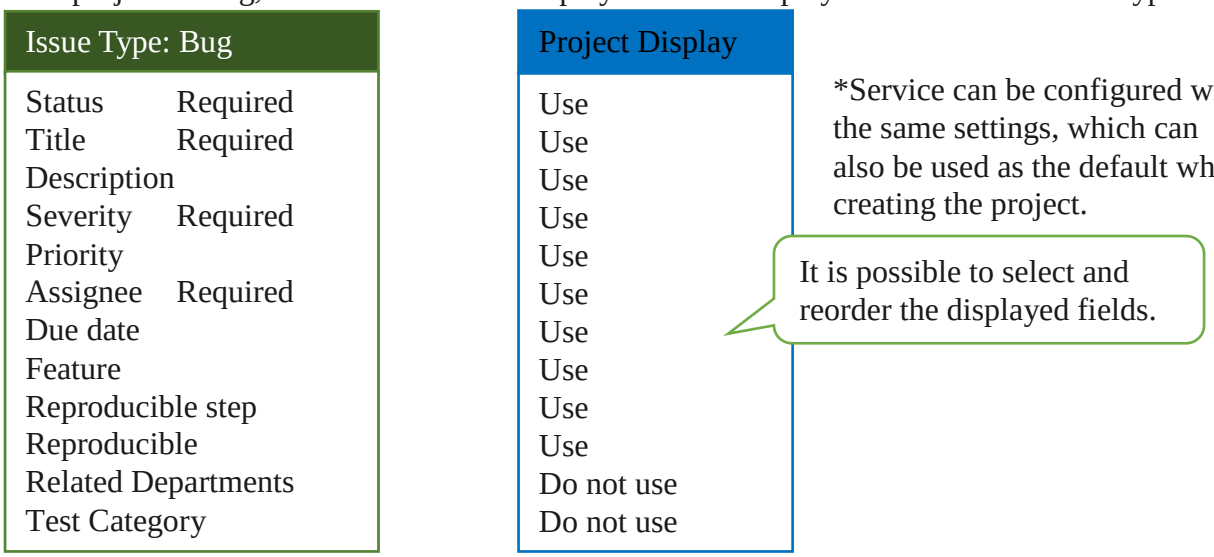
1. Set the issue type in the system setting

The user can create a task type, select a field to use and do the required settings for the selected field. It's also possible to assign a custom field in advance to the task type.

[Example: The circumstance of creating a type of Issue or request and setting different fields for it]



2. In the project settings, select the type to use from among the types created in the system setting. In the project setting, the user can set the display field and display order for the selected type.



1.4. Screen Overview

This chapter illustrates CAT's basic screens. CAT's header, which is on the top of the screen, will be introduced first.

Header functions

No.	Item	Operation
1	CAT Logo	• Go to the top screen
2	Project drop-down list	• Move to the latest project • Go to the Project List
3	ISSUE button	• Register new issue
4	Profile icon button	• Account Setting • Inquiry • Logout
5	Setting button	• Service management • Project management • User Management • Issue management • System management

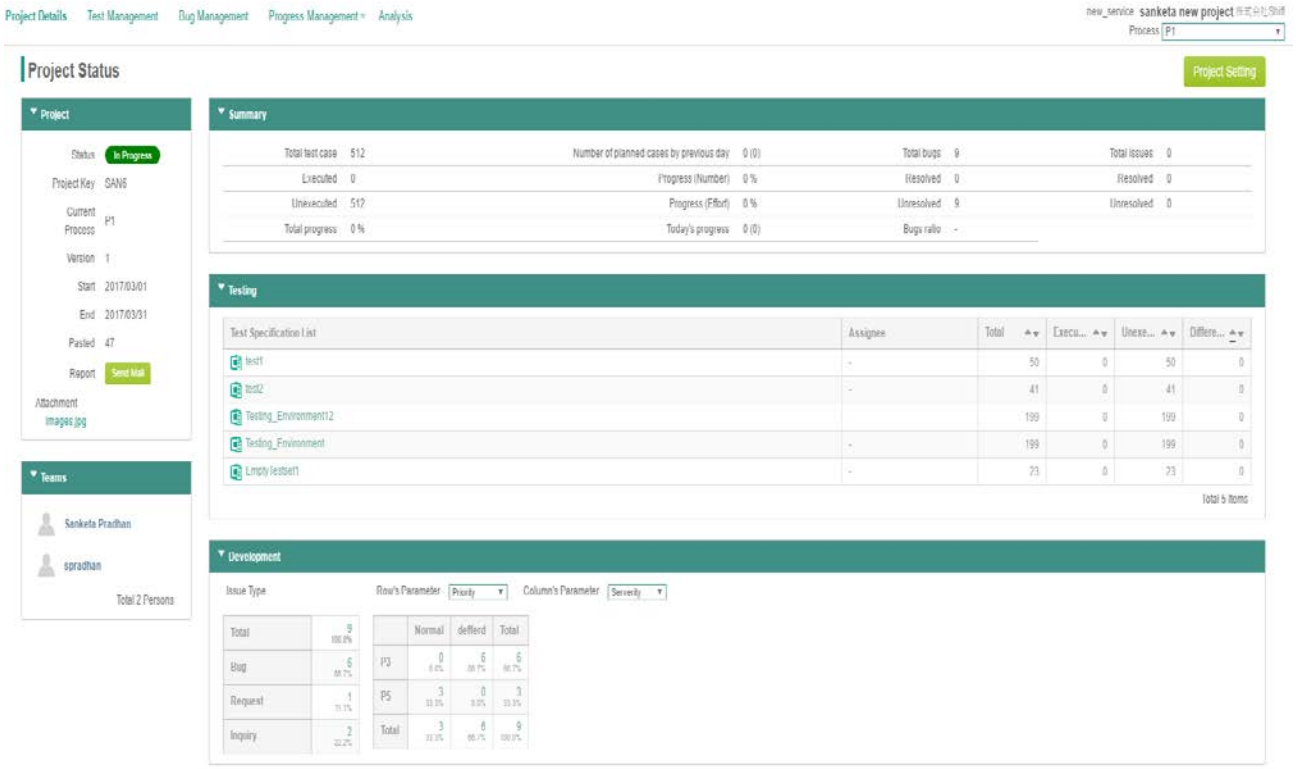
The menu bar under the header in CAT's basic screen is as shown below.

The screen will be switched to another one corresponding to the button pressed and the user can also check those related services, projects and processes on it.

Here we introduce CAT's current basic screens as below:
(1) Project Details Screen
(2) Test Management Screen
    A) Test Suites List Screen
    B) Test Case Edit Screen
    C) Test Execution Screen
(3) Bug Management Screen
(4) Progress Summary Screen

(5) Progress Detail Screen
(6) Test Issues Screen
(7) Analysis Screen
The summary of each screen will be presented here.

(1) Project Details Screen

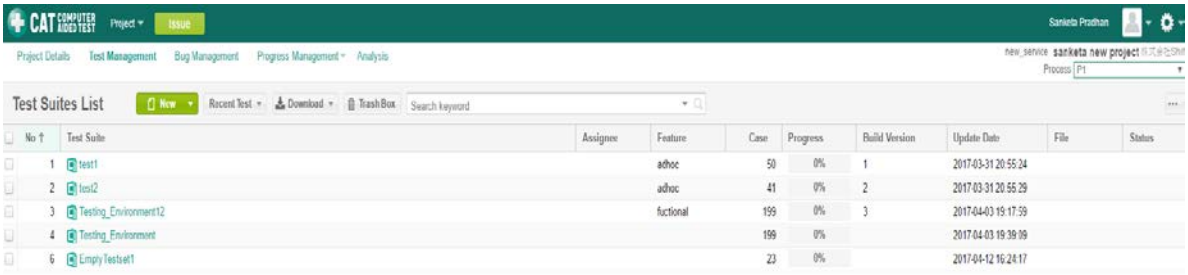


This is the top page of a project in which the user can check many statuses like project's test status, issue status and so on. It also links related test suites and issues so that the user can access them directly.
Besides, it's possible to set up the project through Project Setting Button, such as issue setting, ExtBTS, and testing environment.

(2)Test Management Screen

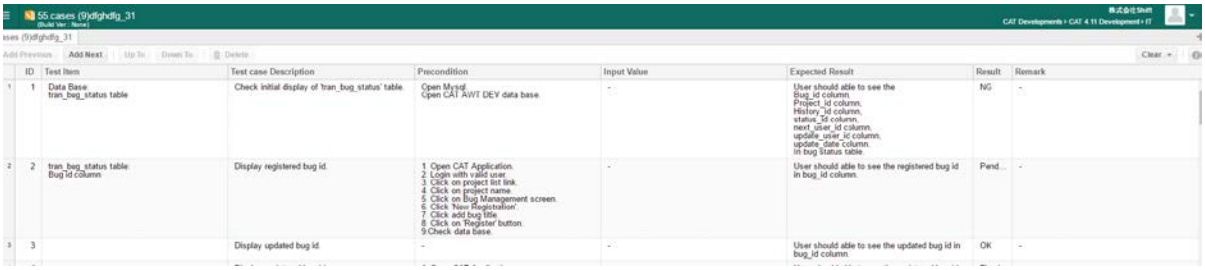
There are three main screens of test management as below.

A) **Test suite list screen**



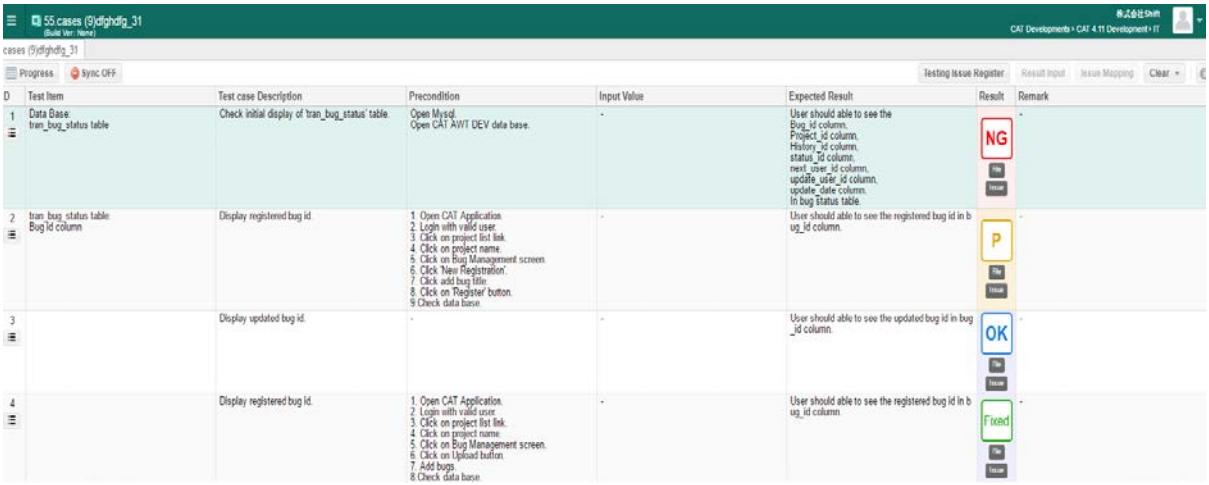
The user can check the overview of test suites, get to the test case edit screen and test execution screen or upload and download the test suites.

B) **Test case edit screen**



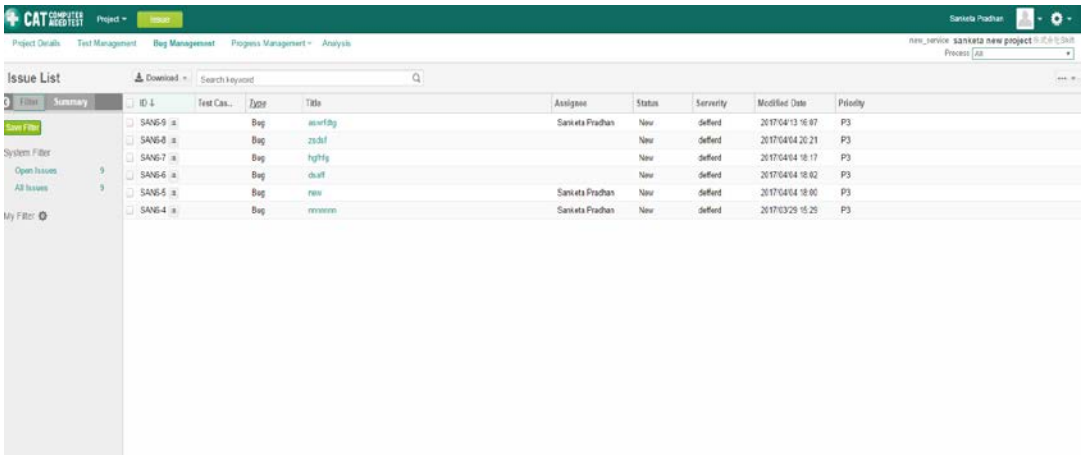
The user can edit the registered test case.

C) **Test execution screen**



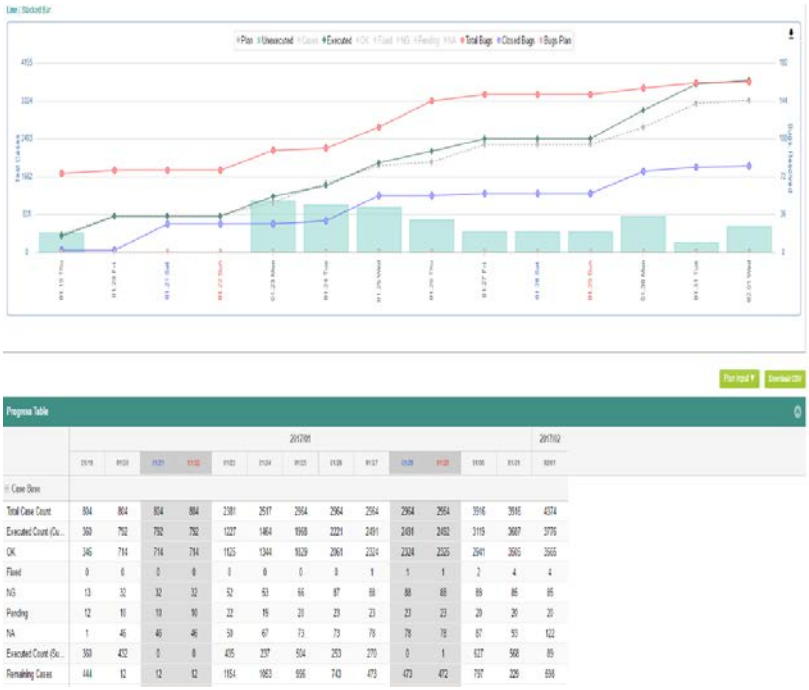
The user can also execute, check and download the registered test suite or attached the registered bug to the current test case.

(3) Bug Management Screen



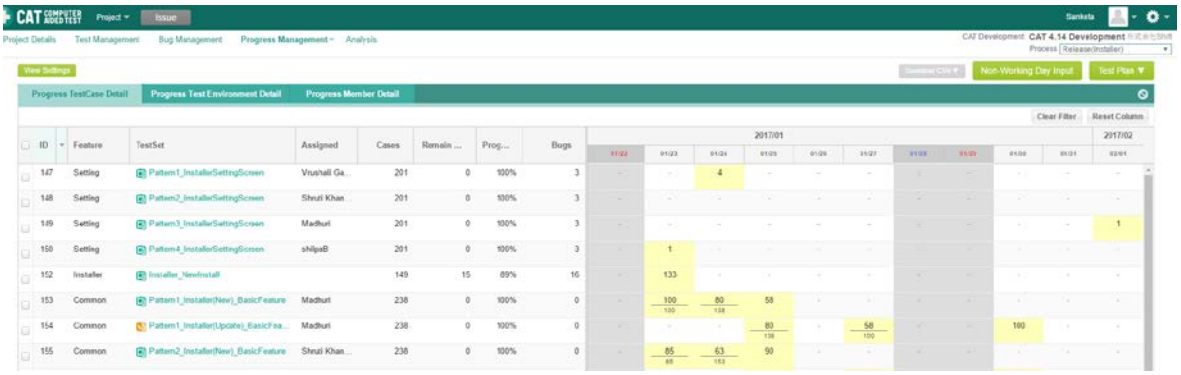
It’s possible to register, edit, delete refer and download the bug on this screen for the management purpose. Besides, the function of the filter is also available for facilitating operations.

(4) Progress Summary Screen



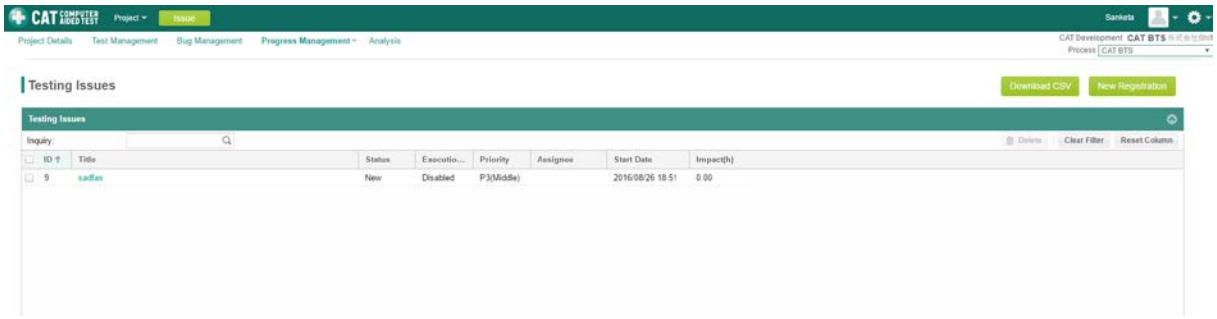
It is one of progress management screens, in which the user can check the test progress by the graph and the table. Besides, it’s also possible to modify the period of displayed data for the graph or the table.

(5) Progress Detail Screen



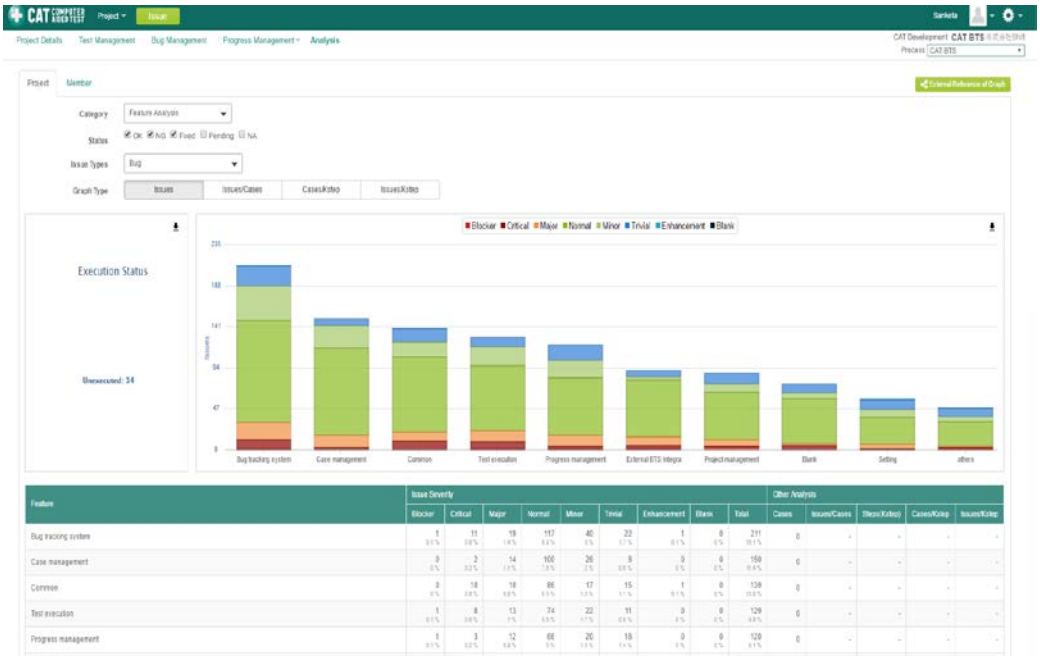
This is one of progress screens, in which the user can check the progress test case detail, progress test environment detail and progress member detail. It's also possible to input the non-working day and register the test schedule which can be displayed by the schedule graph.

(6) Testing Issues Screen



It's one of progress screens in which the user can manage the test execution and related bugs. Besides, it's also possible to prohibit the execution of the test suite that causes test bugs by registering the test bug. Progress detail screen includes the current test bug status can also be checked by the user.

(7) Analysis screen

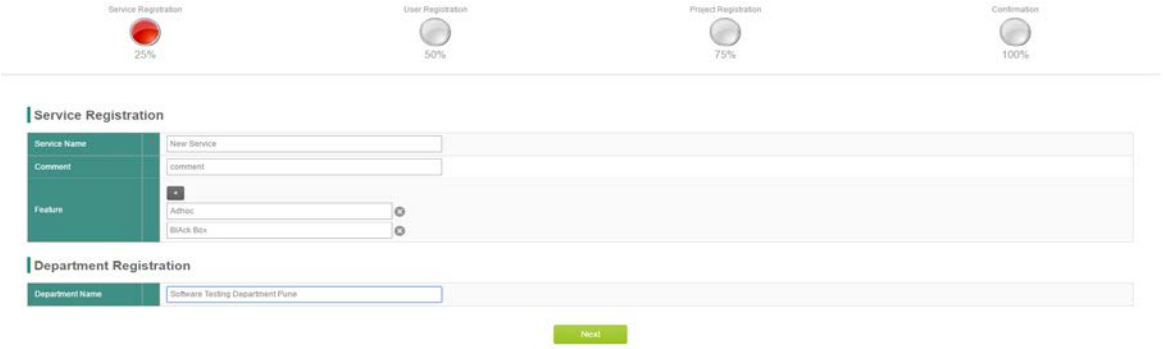


It’s possible to do a different analysis on the project information by utilizing the graph and the table with different viewpoints and categorization.

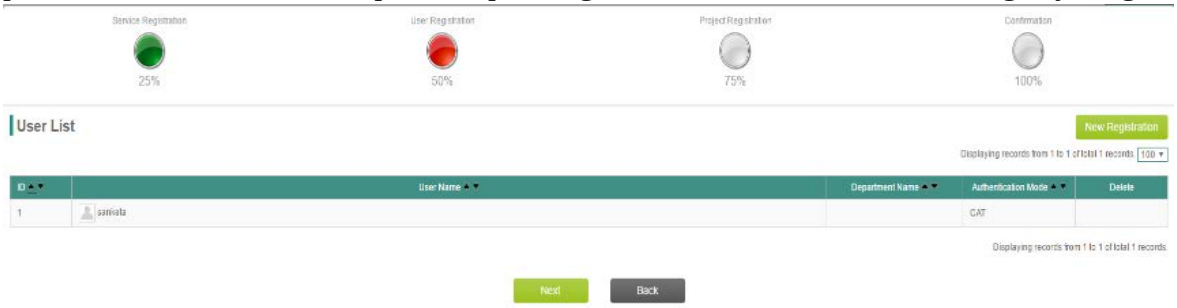
1.5. Setting Initial Project with the Wizard

The wizard will be launched for creating the first project in the first login after the installation.

STEP 1: Register the service (Please refer to the “User Manual -Application-“for more details).
Enter the service name and press “Next button” and other items can be inputted later.
* It’s also possible to register the project here if necessary.



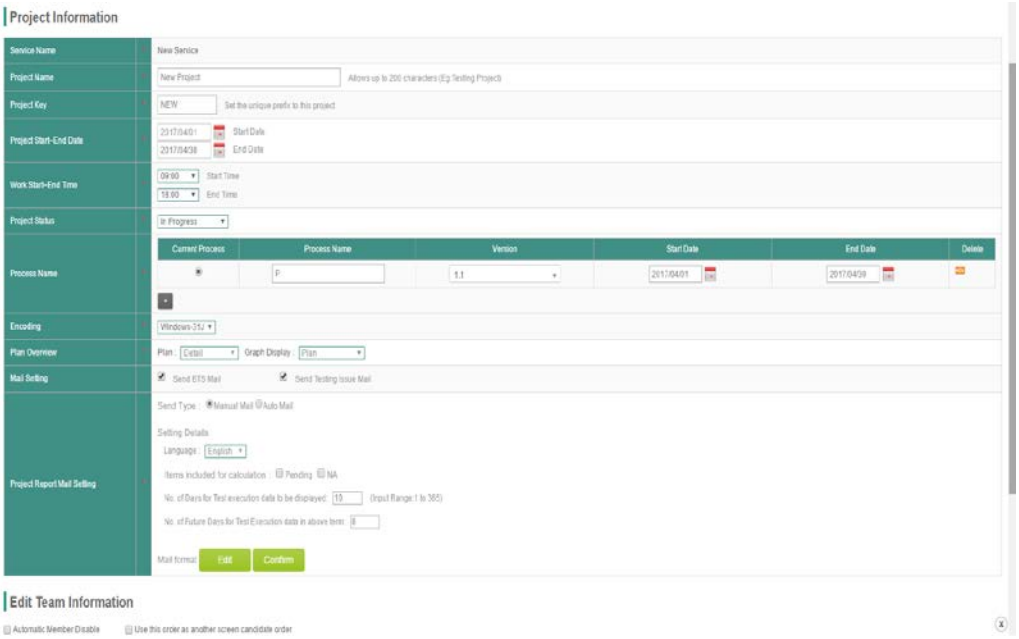
STEP 2: Create a user (Please refer to "1.7 adding the user")
The user account created when installing the CAT will be granted the employee (administrator) authority, in which can be used for the first login. The user registration can be processed later so there is no problem pressing the “Next Button” without doing anything in this step.



* Initial user registration can also be processed here if necessary.

STEP 3: Create a project (Please refer to “User Manual -Application-” for more details)

Input the basic information for creating the initial project.

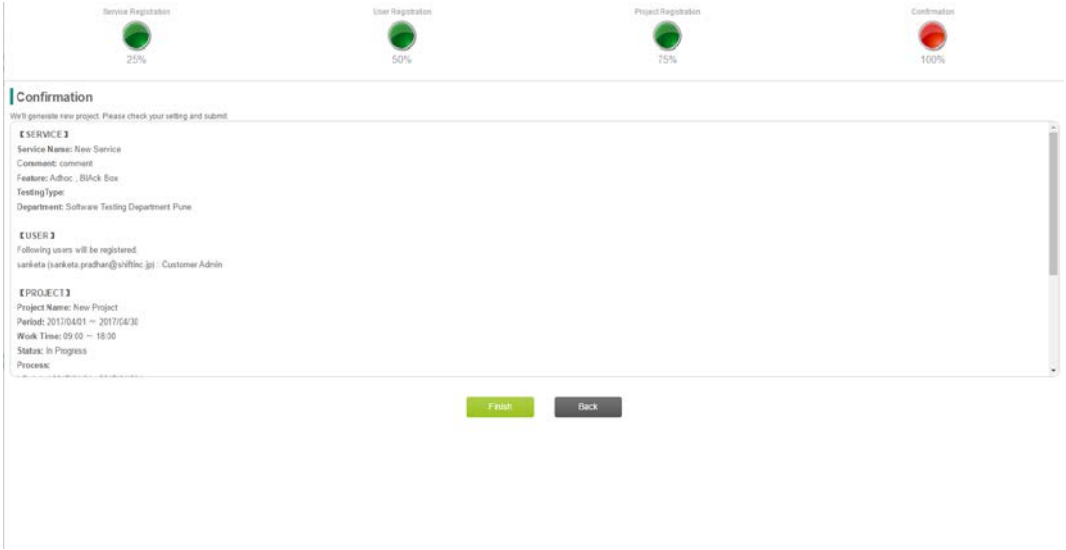


Please input the required items (*) and press the “Next Button”.

STEP 4: Confirm the contents to be registered.

All the contents to be registered will be presented here.

Press the “Finish Button” to end the wizard and finish the initial project registration.

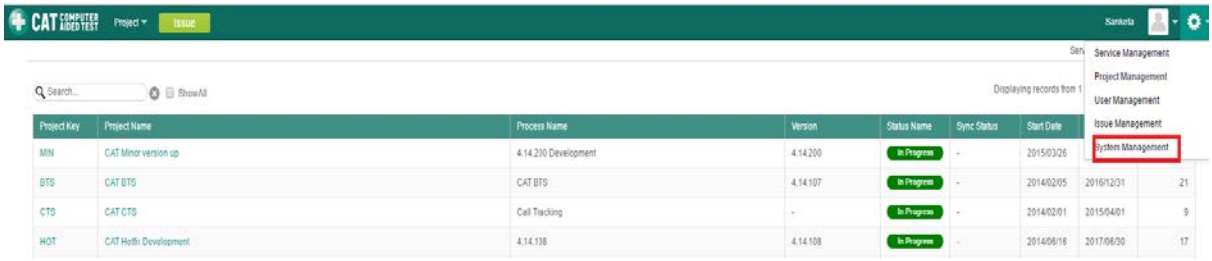


The wizard will be closed after above steps.

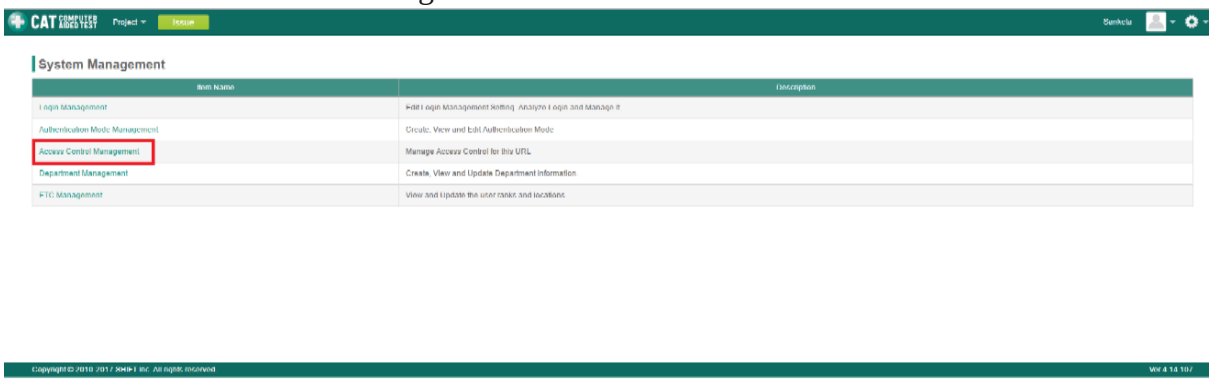
1.6. Restrict the Access with IP Address

Being accessible from anywhere is one of the default settings after installing the CAT. For better security, it's possible to control the access through registering the global IP address in advance. Please login with the Administrator authority and operate following steps in order to adjust the settings.

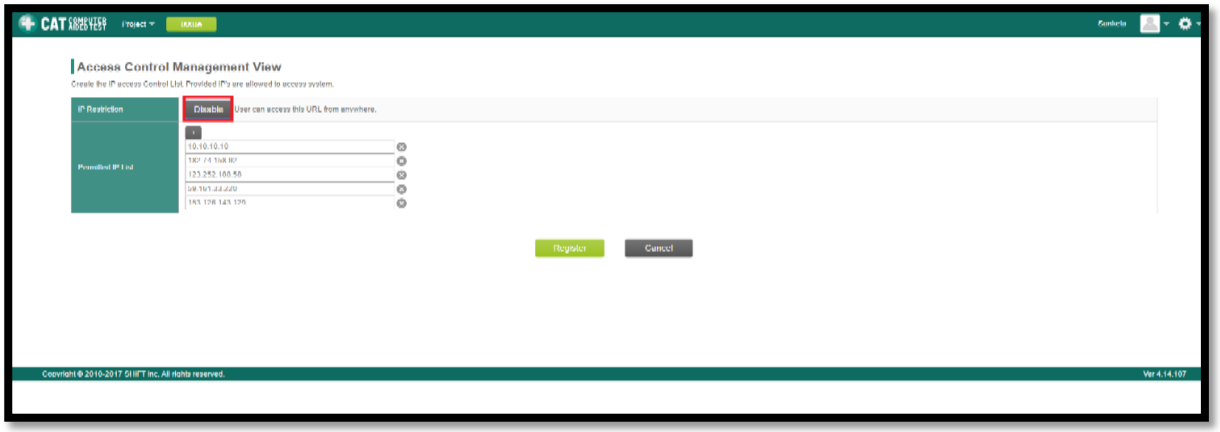
(1) Mouse over to the setting button and press the System Management item on the drop-down menu.



(2) Press the "Access Control Management" button

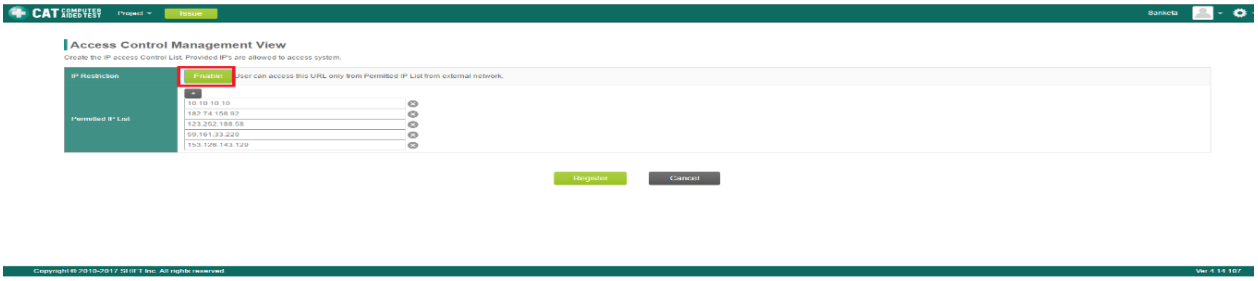


(3) Click the Disable IP Restriction button to activate the access restriction.



(4) Press the registration button after inputting the IP address allowed.
Except those in the allowed IP list, no other IP addresses can access the CAT system and the only way to lift it is to nullify current settings by pressing the IP Restriction button.

※ Please set up the global IP address for accessing the gateway (if you're not sure about which IP address to use, please contact the system administrator in your company).
※ IPv6 is not supported and IPv4 corresponds to CIDR notation is supported (it's possible to specify the class until class B).



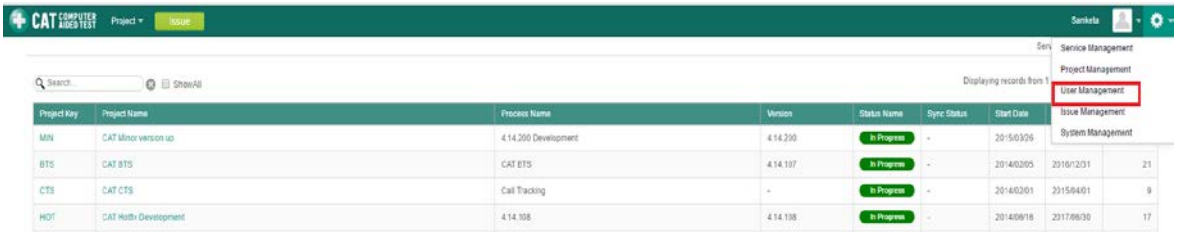
1.7. Adding the User

This chaper illustrates a way to add the user. Beside the one here, there is the other way to add a batch of users by uploading the file in which you can check in “User Manual -Application-”.

1.7.1.Creating a New User

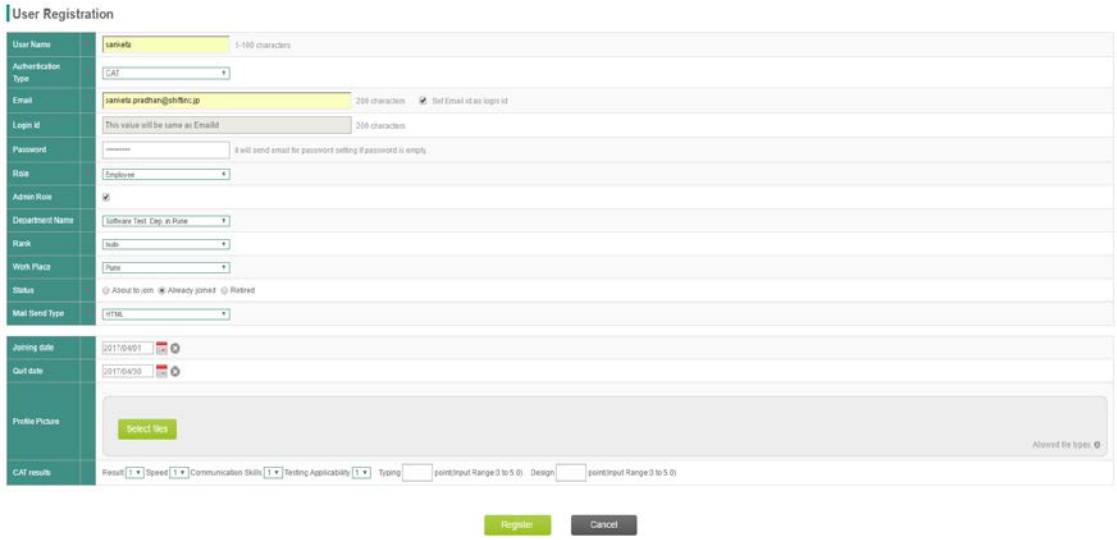
For registering a new user, please do following operations.

(1) Press the “User Management” button on the header’s drop-down list.



(2) Press the “User Registration” button on the dropdown menu shown after pressing the “New Registration” button.

(3) Press the Register button after inputting the user information.



[Screen Item]

Item	Description
Authentication method	Select an external certificate registered through the CAT certificate setting. It is possible to alter configurable items based on the setting contents when the external certificate is selected.
User name	Input the user name.
Using mail address as the login ID	CAT recommends using mail address as the login ID. Please also notice that setting login ID is not allowed at the beginning because “Set Email as login id” activated as the default. Please nullify the default setting if you want to set up the login ID and mail address separately.
Login ID	Enter the login ID
Mail address	Mail will be sent to the email address registered from CAT.
Password	For setting up the password, the password setting mail will be sent to the user if the mail address was set up without specifying the password. However, setting up the initial password is required if there is no mail address being set up at the beginning.
Role	There are three different roles that the user can choose for an account: Employee, contracted employee and customer. To know the difference between these three roles, please refer to chapter 1.2.1 User Roles.
Grant the authority of administrator	The role of administration can only be granted to the employee account and at least administator role should be set up in the system.
Department	Select a registered department in the department setting.
Rank	Select a registered rank in the “Other Setting”, please refer to “User Manual -Application-” for more details.
Work Location	Select a registered work location in the “Other Setting”, please refer to “User Manual -Application-” for more details.
Status	Input the user status.
The way to send the Email	It’s possible to select the way to send the Email, the report mail will be sent in HTML format even if it contains some contents in non-HTML format.
On board date	Input the user’s on board date.
Resignation date	Input the user’s resignation date.
Profile Picture	Upload and register user’s profile photo and the profile photo’s file size should be compressed to around 100KB or less.

1.8. Setting Profile Photo, Language, and External BTS Password

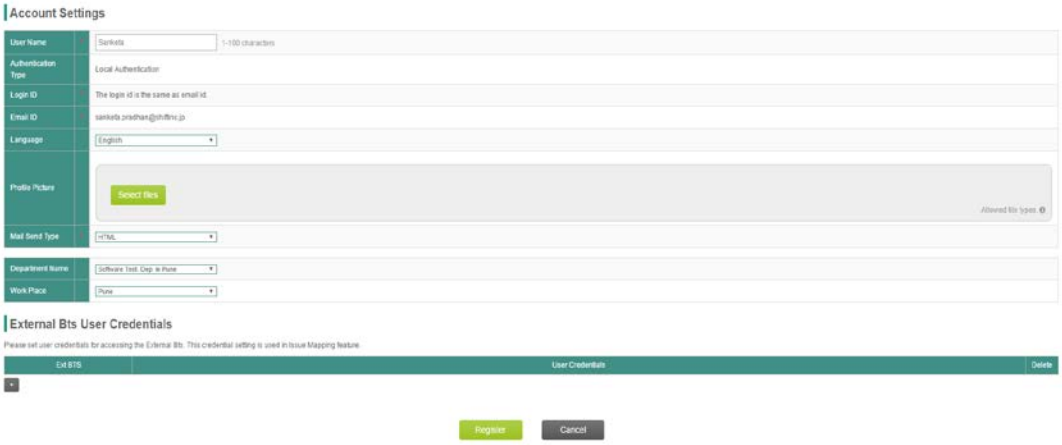
CAT has many different project setting screens for users, such as updating profile picture, language and password in which can be processed by the account without administrator role. For more details of changing the password, please refer to 1.9.1 changing the password, as for the external BTS authentification settings please refer to “9.Connecting External BTS – 2.2 Setting External BTS authentification”.

Here we have the plan to edit the user account.

(1) Please mouseover the profile picture for showing the dropdown list so that the account setting item on it can be selected.

(2) Press the Edit Button

(3) Modify the Item to be Changed and Press the Register Button



Each user can do the account related settings as the below table shows.

Setting Items	Remarks
User Name	Please set user name within 100 characters. * LDAP users can not be changed.
Language	The user can select CAT display language from Japanese / English.
Profile Picture	Upload photos.
Department	The user can select a department. * LDAP users can not be changed.
Work Location	The user can choose your work location. * LDAP users can not be changed.
The way to send the Email	It's possible to select the way to send the Email, the report mail will be sent in HTML format even if it contains some contents in non-HTML format.

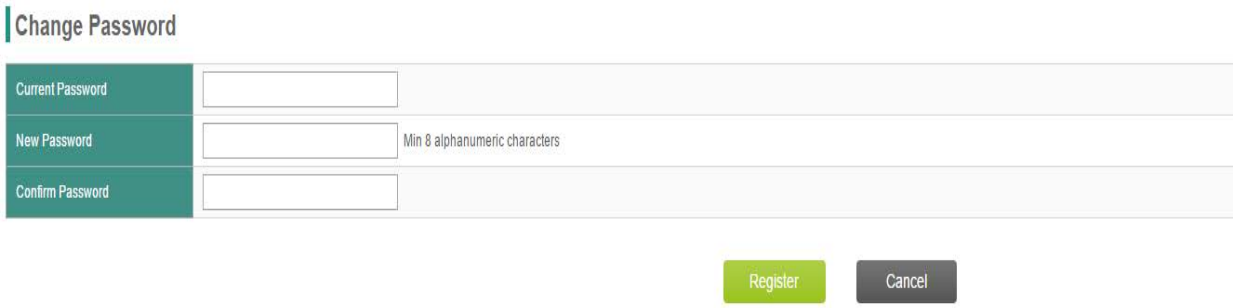
1.9. Setting a Password

1.9.1.Changing the Password

Please do following operations for changing the password.
* LDAP users can not change passwords from the CAT.

(1) Press the “Change Password” button on the account setting screen.

(2) Input the new password you’d like to use and press the “Register” button.



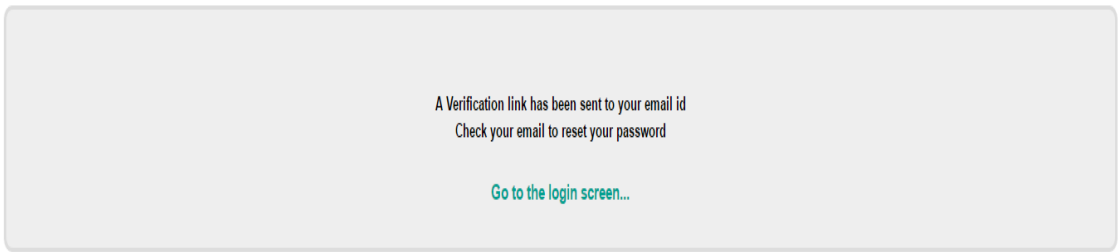
Input Items	Description
Current Password	Input the current password.
New Password	Input the new password you’d like to use.
Confirm Password	Input the new password you’d like to use again.

1.9.2.Resetting the Password

This section illustrates the way to reset the password, which can be utilized when the user forget the password or the account is locked.

(1) Click the link of “Forget Password” in the login screen.

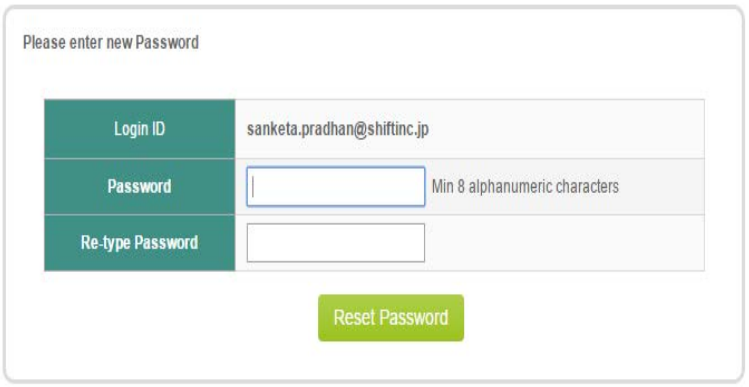
(2) Press the “SendMail” button after inputting the Email address account you’d like to reset the password. After that, an Email that contains the link for resetting the password will be sent to the Email address inputted.



(3) Click the link for resetting the password in the Email sent to the inputted Email address.

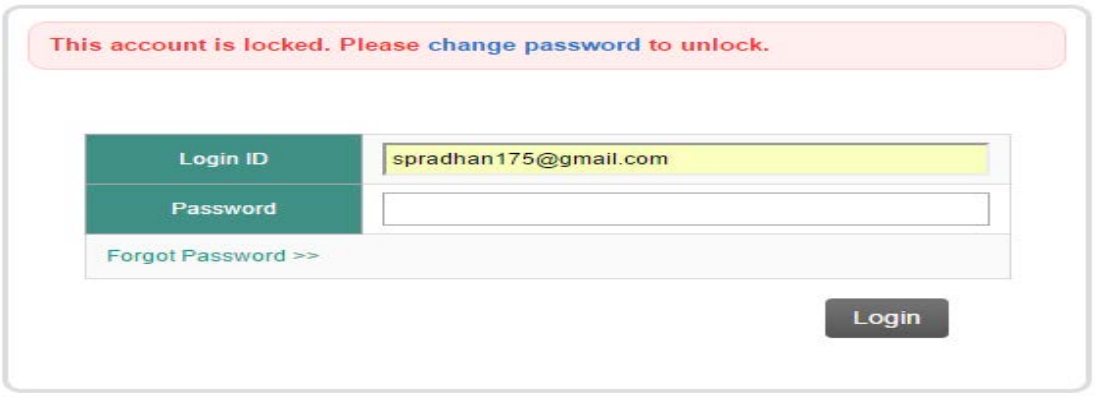
Please click the below URL to reset your CAT password.
https://lvzkpmqe.softwaretest.jp/resetPassword?token=%242a%2410%24B%2FCwzCsbVqr6Cu.KnOEx2eybqkkPp%2FR5q5ylbzvtkEfOYB%2FA.LKWK&loginId=sanketa.pradhan%40shiftinc.jp

(4) Input the new password and press the “Reset Password” button. For better security, the new password should be different from the previous one.



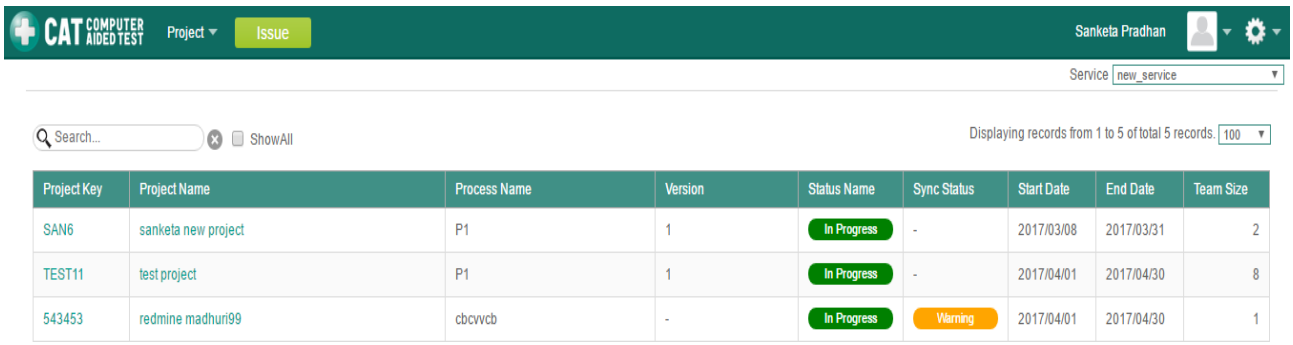
※About the account lock

The CAT will lock an account if its number of failed logins reaches the limit. The acount can be unlocked by the way mentioned above or from the URL enclosed to the Email for reporting the account lock.



1.10. Select Project to Use

All projects the login user enrolled will be presented on the project overview screen after the login. The combo box in the upper right screen can be utilized when the user'd like to refer to the project under other services. Let's start using the CAT by clicking a project in it!
※For showign those closed projects, please click "Show all" box.



[Screen Item]

Item	Description
Project name	A list of registered projects is displayed. Click the project name to display the project details screen.
Process name	The current process name is displayed.
version	The version of the process is displayed.
status	The status of the project is displayed.
Start date / end date	The project start date and end date are displayed
Team Size	The number of team members of the project is displayed.
Service	The user can select a service. Projects of the selected service are displayed in the project list.
Simultaneous display count	User can select the number of projects to display on one page. The number of selectable display counts is 10, 30, 50, and 100.
Search	User can search for a project that contains the input character string as the project name.
All views	Normally, the project whose status is terminated is hidden, but if user check the All check box, it will be displayed.

Chapter 2 Restictions

2.1. Support Environment

This section illustrates the CAT supported client environment, browser, file, external BTS and LDAP.

■ Client environment

Client OS	Chrome(Latest)	InternetExplorer 11
Windows 7 Professional 32bit/64bit ServicePack1	●	●
Windows 7 Ultimate 32bit/64bit ServicePack1	●	●
Windows 8/8.1	●	●
Windows 8/8.1 Pro 32bit/64bit	●	●
Windows 8/8.1 Enterprise 32bit/64bit	●	●
Windows 10 Pro 32bit/64bit	●	●
Windows 10 Enterprise 32bit/64bit	●	●

Supports screen resolution of 1024 x 768 (XGA) or higher

■ External BTS Connection

Connecting BTS (Bug Tracking System) made by a third party as below is possible. Through connecting the extenal BTS, the user can synchronize the bug information between a specified external BTS and a CAT project and check the detail on the CAT.

BTS	Support Version	Remarks
Redmine	1.3.0 – 2.6.x 3.2.x	Please refer to “User Manual -Application-” for more details.
JIRA	5.0 – 7.x	Please refer to “User Manual -Application-” for more details.
Backlog	2015-08-27	Please refer to “User Manual -Application-” for more details.
GitHub	V3	Please refer to “User Manual -Application-” for more details.

■Connecting LDAP

CAT supports LDAP authentication using single or multiple directories, such as open LDAP and Active Directory. For more details about connecting LDAP, please refer to “User Manual - Application-”.

2.2. Registrable File types

Test suite, profile picture and attached file are three kinds of file type supported by CAT, which will be illustrated below.

■Test Suite

Excel (xlsx) and CSV are supported by CAT and can be utilized for registering, downloading test suites and the miximun file size allowed is 10MB. Supported CSV characters encodings are Shift-JIS (Windows - 31J) and Unicode (UTF - 8, UTF - 16). Besides, please also notice that the maximun test cases allowed in a test suite is 5000.

■Profile Picture

Following file formats are supported for the profile picture, which will be thumbnailed right after the uploading.

File Type	Filename Extension
Image file	png, jpeg, jpg, gif, bmp

■ Attachment

The following file formats are supported for attachments and the maximum file size allowed is 10 MB and the maximum file number is 10.

File Type	Filename Extension
text file	txt, csv, tsv, log
Office	doc, docx, xls, xlsm, xlsx, ppt, pptx, rtf, odt, ods, odp, odg
HTML	html, htm
Image file	png, jpeg, jpg, gif, bmp, tif
Compressed file	zip, lzh, lha, tar, tgz
Audio files	wav
PDF	pdf, xps, oxps
Movie file	mp4

※ The maximum allowed number of attached files is 100 in Bug management.