CAT4.14 User Manual
-Application-

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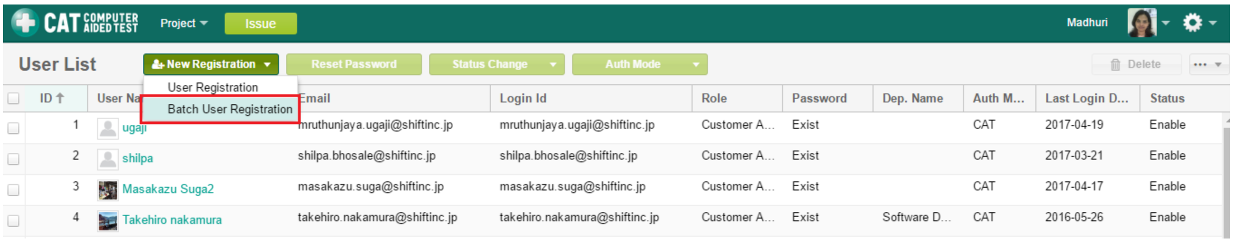
Chapter 1: User Management

1.1 Register Users in Batch with a CSV File

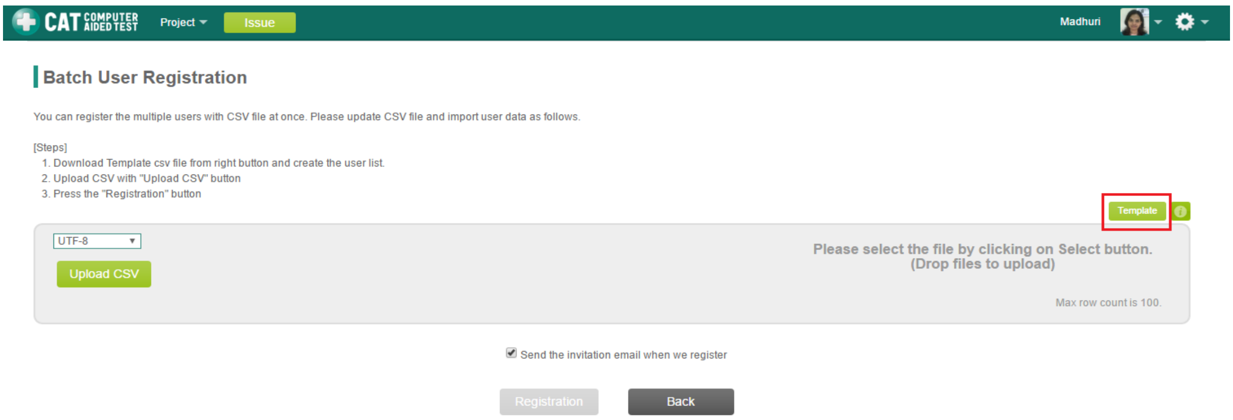
Here shows the way to register users in batch with a CSV file. It's possible to upload the CSV file that contains users' information in CAT's user registration format, which is downloadable by pressing the default button.

(1) Press User Management link from the header drop-down menu.

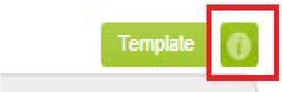
(2) Click the Batch User Registration link in the drop-down menu shown by pressing the "New Registration" button.

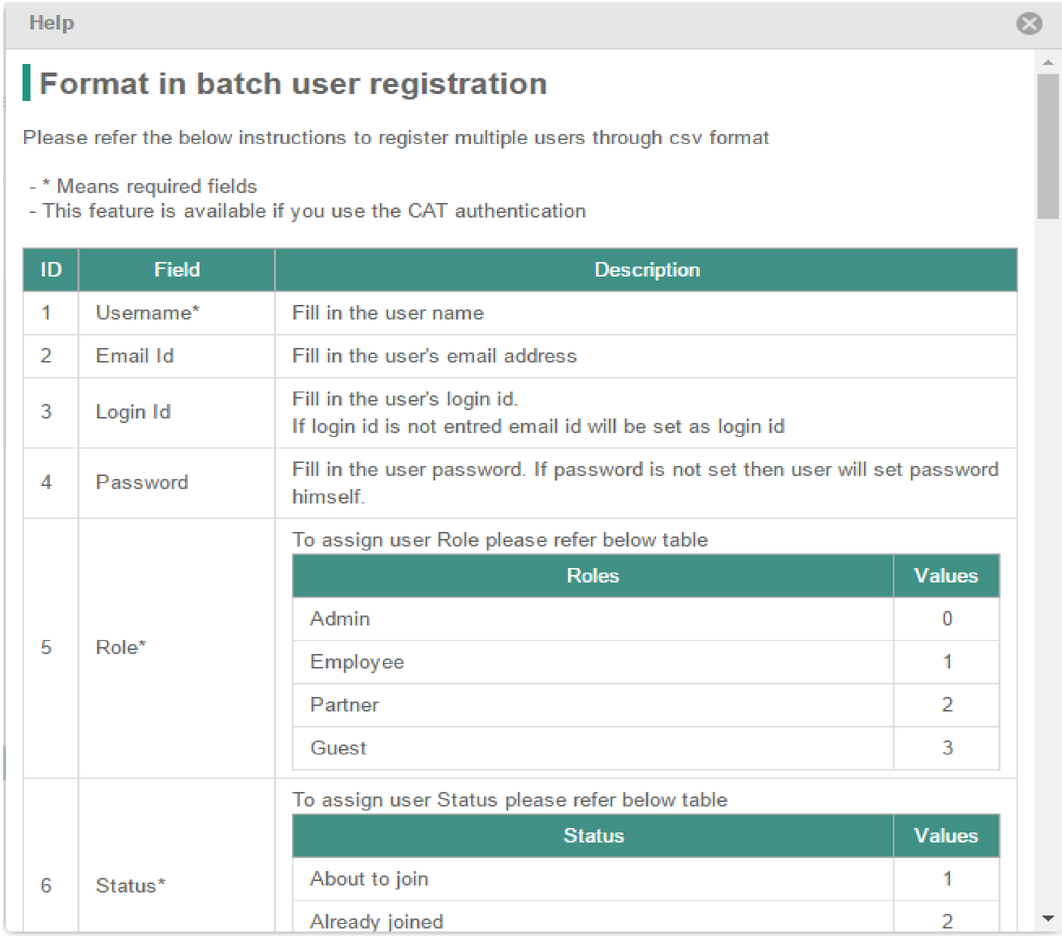


(3) Please press the template button and download the format for registering users in a batch. This step is omittable if the user already has the format which can be used.



(4) Check the user information format by pressing the help button, which is required if the department format and work location are different from current CAT settings.




Help

Format in batch user registration

Please refer the below instructions to register multiple users through csv format

- * Means required fields
- This feature is available if you use the CAT authentication

ID	Field	Description
1	Username*	Fill in the user name
2	Email Id	Fill in the user's email address
3	Login Id	Fill in the user's login id. If login id is not entred email id will be set as login id
4	Password	Fill in the user password. If password is not set then user will set password himself.
5	Role*	To assign user Role please refer below table
6	Status*	To assign user Status please refer below table

Roles	Values
Admin	0
Employee	1
Partner	2
Guest	3

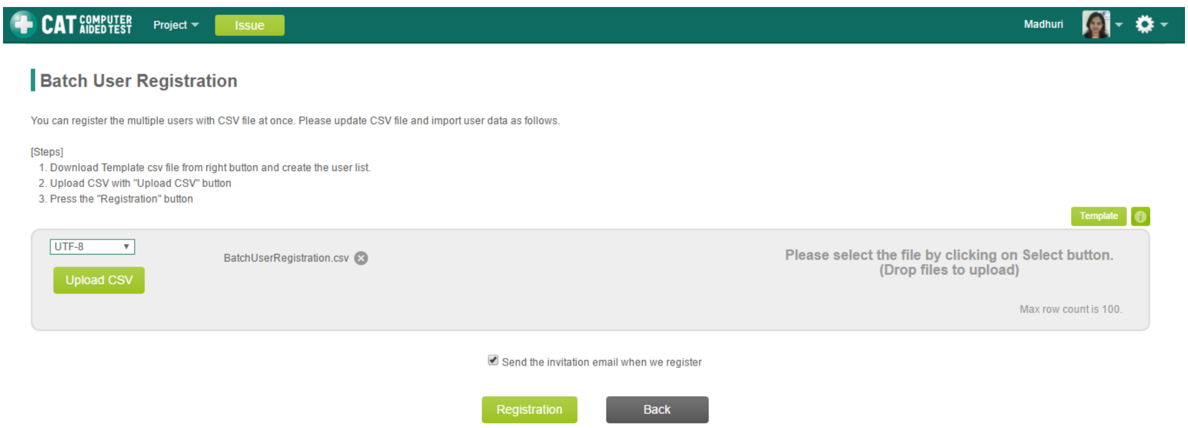
Status	Values
About to join	1
Already joined	2

<table>
<tr><th>Column Name</th><th>Description</th></tr>
<tr><td>Username</td><td>Please enter the user name (required).</td></tr>
<tr><td>Email</td><td>Please enter the e-mail address (required)*.
* Could be optional for CAT’s client version or download version.</td></tr>
<tr><td>Login ID</td><td>Please input a login ID or the Email address will be used as the default one.</td></tr>
<tr><td>Password</td><td>Please input the password or set up a new password in the first login.</td></tr>
<tr><td>Role</td><td>Please enter the required user authority in scale 0-3 as guided below.
<table>
<tr><th>Authority</th><th>Input Value</th></tr>
<tr><td>Employee (Administrator)</td><td>0</td></tr>
<tr><td>Employee</td><td>1</td></tr>
<tr><td>Contract Employee</td><td>2</td></tr>
<tr><td>Customer</td><td>3</td></tr>
</table></td></tr>
<tr><td>Status</td><td>Please enter the required user status in scale 1-3 as guided below.
<table>
<tr><th>Status</th><th>Input Value</th></tr>
<tr><td>About To Join</td><td>1</td></tr>
<tr><td>Already Joined</td><td>2</td></tr>
<tr><td>Retired</td><td>3</td></tr>
</table></td></tr>
<tr><td>Department Name</td><td>Please enter the department name and check its corresponding value on the Batch User Registration Screen shown by pressing the “i” button.</td></tr>
<tr><td>Work Location</td><td>Please enter the work location and check its corresponding value on the Batch User Registration Screen shown by pressing the “i” button.</td></tr>
<tr><td>Joining Date</td><td>Please enter the employment date in YYYY / MM / DD format.</td></tr>
</table>

(5) Please enter the user information to be registered into the CSV file.

1	Username*	Email Id*	Login Id	Password	Role*	Status*	Departmen	Work Place	Joining Date
2	Madhuri	madhuri.hinge@shiftinc.jp		Madhuri123	0	1			2017-04-21
3	Vrushali	rushali.gavande@shiftinc.in		vrushali124	0	1			2017-04-22

(6) Upload the user information through drag & drop the file or pressing “Upload CSV” button.



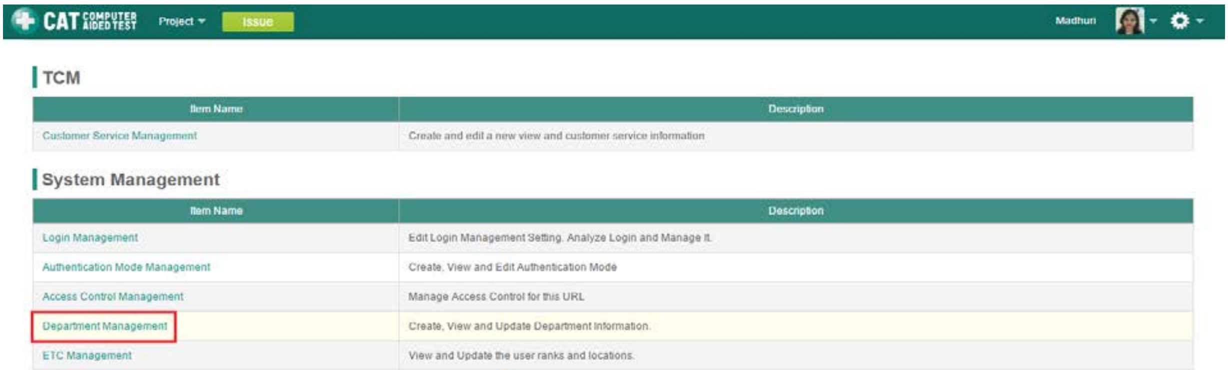
1.2 User Attribute Management

The user can register the department, rank and work location that they would like to register, which are utilizable as the search term when setting up the team.

1.2.1 Department Management

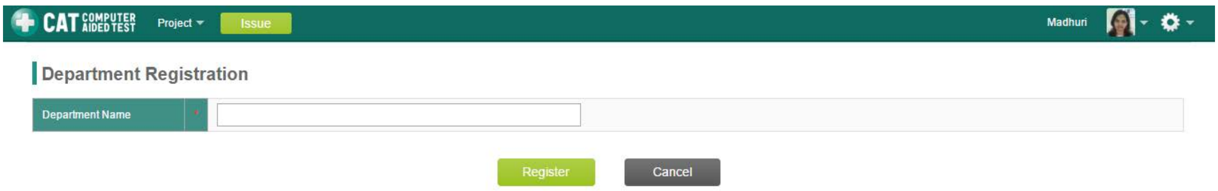
(1) Mouseover the Setting Icon and press the System Management in the drop-down menu.

(2) Press the department management button link.



(3) Press the “New Registration” button.

(4) Enter the department name and press the register button.

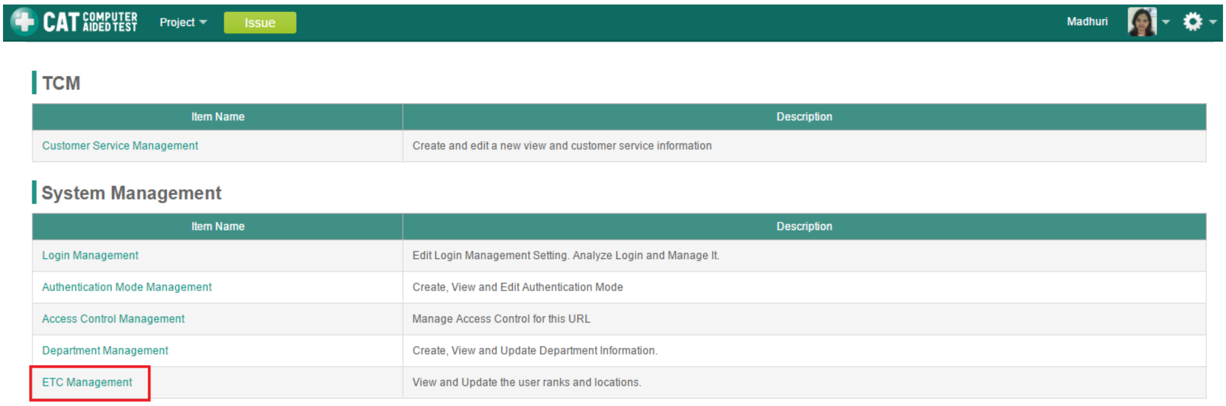


1.2.2 Rank and Work Location Management

Please follow the below guides to register the rank and the work location.

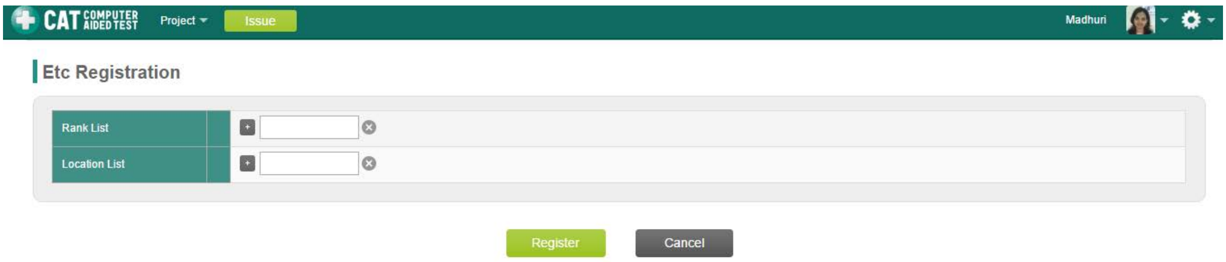
(1) Select System Management from the drop-down in the header bar.

(2) Press the ETC Management button.



(3) Press the edit button.

(4) Enter the rank and the work location and press the button to register them.



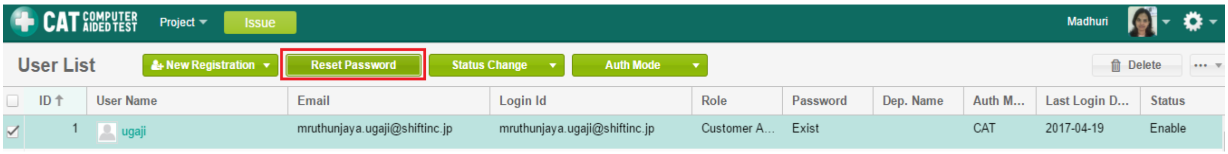
1.2.3 Assign a Department, a Rank and a Work Location to the User

Registered contents can be assigned to the user via user management. Also, you can change your department and work location on the profile edit screen.
Please refer to "Manual User Registration" for more details in "CAT User Manual - Fundamental -".

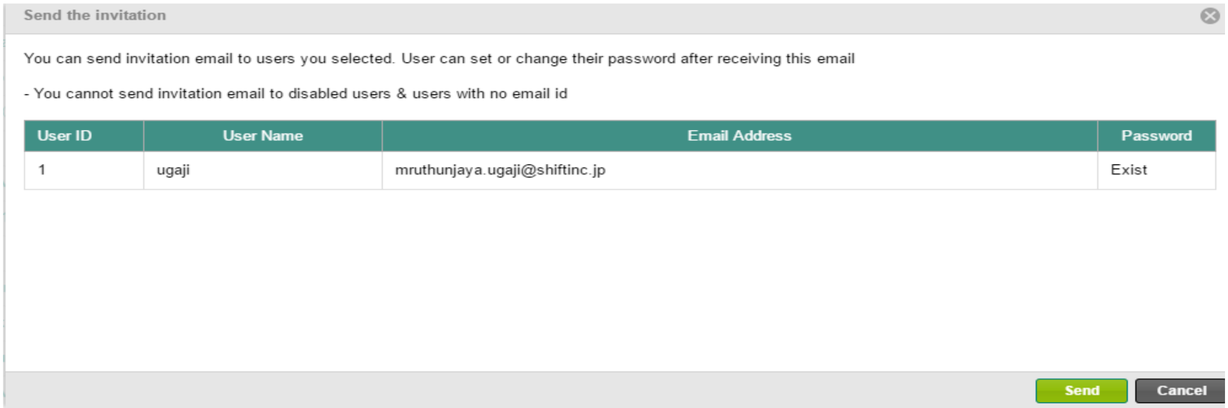
1.3 Send a Mail to Users to Reset the Password in Batch

It is possible to send a mail for resetting the password to users in a batch.

(1) Select users you'd like to reset the password and press the "Resent Password" button.



(2) Please check if everything is correct before pressing the "Send" button and notice that the email can't be sent without the valid status and Email address.

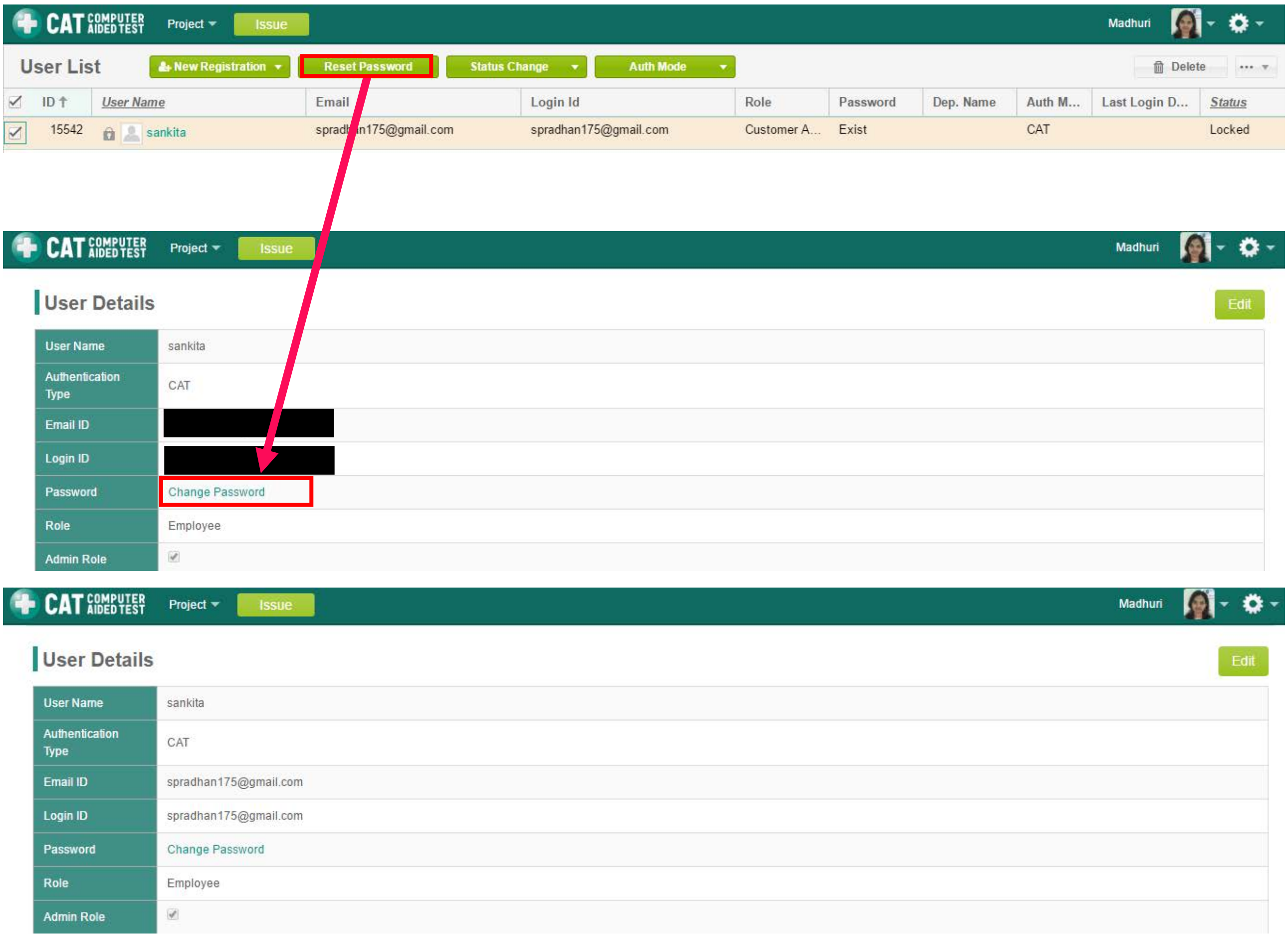


1.4 Lock/Unlock the User Account

For security reason, there is an account function which can lock the account after 5 consecutive login fails. The account owner can unlock the account through email and the administrator user has the authority to lock/unlock the account on the list screen too.

A lock object will appear if the user account got locked. Resetting the account can be utilized to unlock the account.

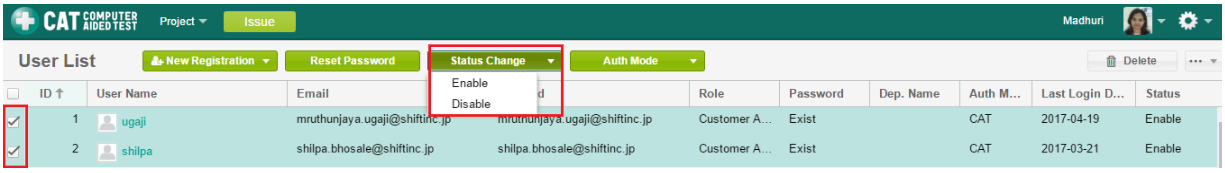
① Reset the password in batch by pressing the “Reset Password” button.
② Click “Change password”.



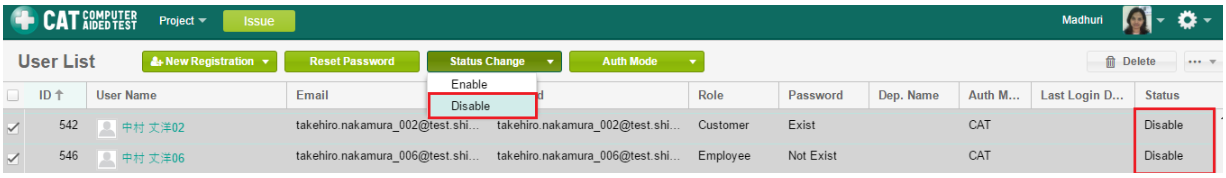
1.5 Switch the User Status (Valid/Invalid)

There are two states: valid and invalid.
The user can disable the authority by disabling the account, which will not be count in licenses used after the operation.

(1) Click the user account and choose an option under the "Status Change" button to switch its status.



(2) The new status will be activated after setting up.

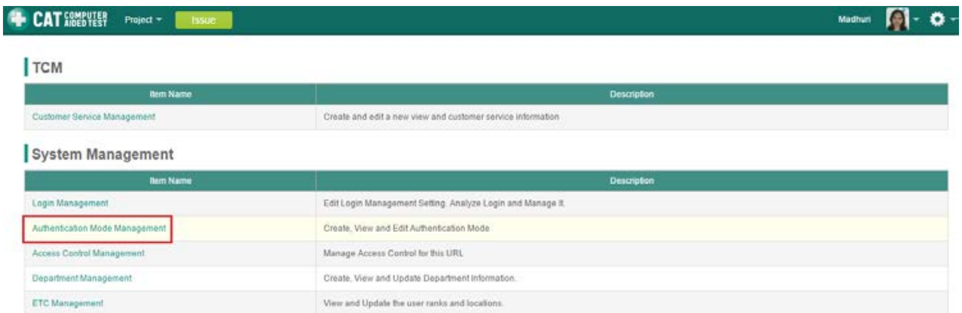


1.6 Connect to the Authentication Server

It's possible to connect the external authentification service by steps below, which will be utilized by the authentification settings illustrated in the previous section.

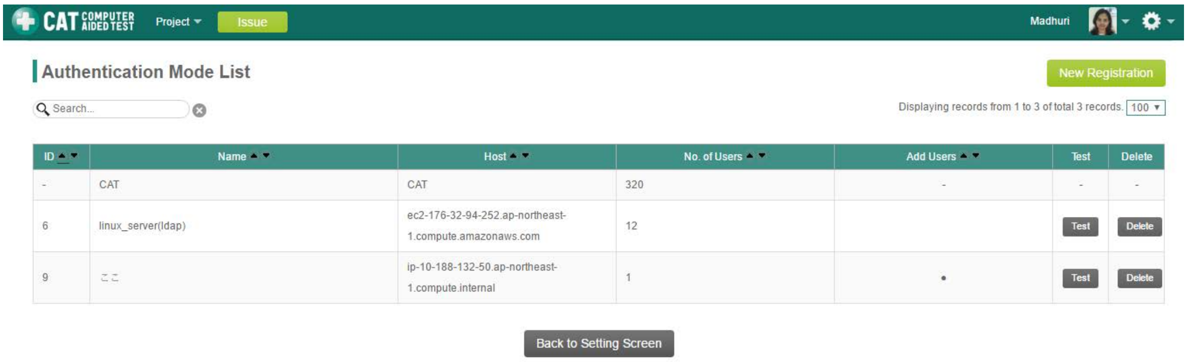
(1) Press the System Management on the header drop-down menu.

(2) Press the Authentication Method Management button.



1.6.1 Check the Configurated Authentification Server

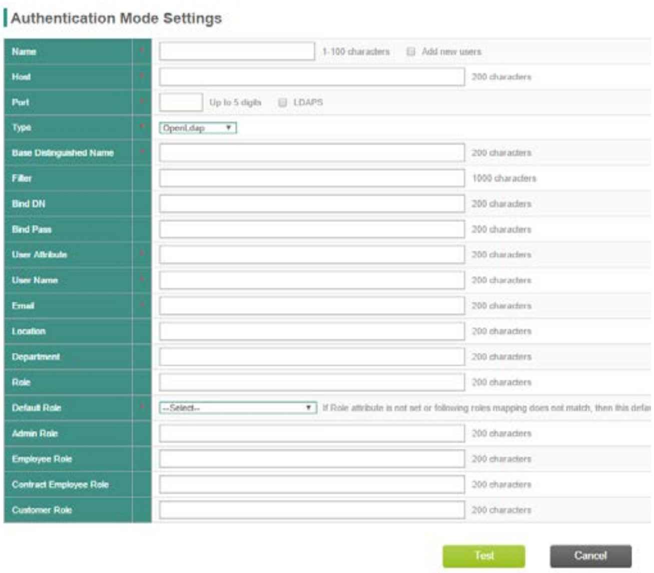
The registered authentification servers can be viewed on the Authentification Mode List (No. of users is the number of authenticated users) and the server setting content can also be checked by clicking the name on it. The user can test the connection of LDAP by pressing the test button and the issue can be checked even with a failed LDAP connection.



1.6.2 Register a new Authentication Server

(1) Press the "New Registration" button.

(2) Press the test button after entering the authentication method and notice that these entered settings are not yet been registered.



Before all settings are finished in CAT, items which can be assigned with any value are configurable, which will become non-revisable after setting up because there are some LDAP policies they ought to follow.

Item	Description
Name	Enter the name for the Authentication Mode.
Host	Enter the server name to be connected.
Port	Enter the port of the host to be connected.
LDAPS	Set the check box on to enable the LDAP setting.
Directory Type	Select the LDAP server connection type (OpenLdap/ActiveDirecoty) to use.
Base Distingushed Name	Enter the basic LDAP base file extension name.
Filter	Customize the search within LDAP directory base on the criteria.
Bind DN	Set up security authentication.
Bind Pass	Set up security authentication.
User Attribute	Enter the LDAP user attribute.
User Name	Enter the LDAP username.
Email	Enter the LDAP Email address.
Work Location	Enter the work location of LDAP.
Department	Enter the department of LDAP.
Role	Enter the LDAP authorization.
Default Role	Set up the default role when there is no related setting.
Admin Role	Enter the Administrator attribute to LDAP authority settings.
Employee Role	Enter the employee attribute to LDAP authority settings.
Contract Employee Role	Enter the contract employee attribute to LDAP authority settings.
Customer Role	Enter the customer attribute to LDAP authority settings.

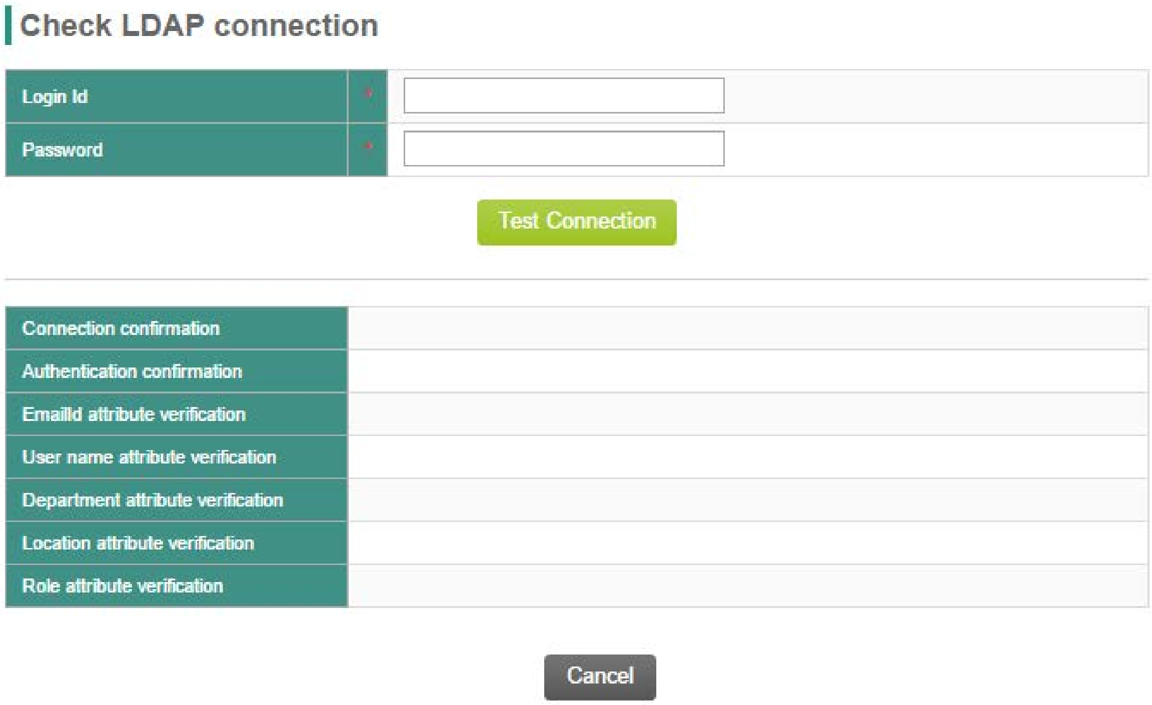
※ About Getting the New User.

There is a function in which can automatically register the user with LDAP server settings if there are users accounts which have fitted passwords exist in the LDAP server.

※ The Mail Address when Connecting to the LDAP Server.

Since the Email address is essential to the CAT, those users without Email attribute can not login when connecting to the LDAP server.

(3) Press the “Test Connection” button after entering the login ID and the password.



The registration can be finished by pressing the “Registration” button after confirming settings of the test connection.

Test Content	Description
Server Connection	For checking whether it’s possible to connect the LDAP server, please notice that the test will fail if it’s not allowed to connect. Please check if the server name and the port number are correct before the connection.
Confirm the Login	For checking whether it’s possible to log in the LDAP server, please notice that the test will fail if it’s not allowed to log in. Please check whether the port number, base file name extension, user file name extension and the password are correct before the connection.
Confirm the User name	It’s possible to get the user name and the test will fail if it’s not possible to do it. Please remember to confirm whether the user name attribute is correct.
Confirm the Email Address	Please confirm whether the Email address is acquirable and correct and notice that it’s possible to do the registration without it.
Confirm the Department	Please check whether it’s possible to get the department and notice that the department can’t connect to the LDAP but it’s possible to do the registration without it.
Confirm the Work Location	Please check whether it’s possible to get the work location and notice that the work location can’t connect to the LDAP but it’s possible to do the registration without it.
Confirm the Authority	Please check whether the authority is acquirable and notice that it’s possible to do the registration without it. Besides, the authority can’t connect to the LDAP.

※ Items which can’t connect to the LDAP are editable.

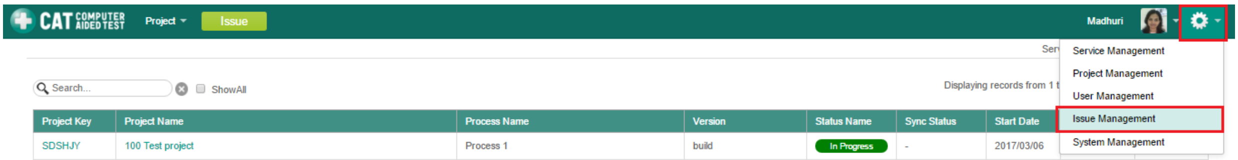
Chapter 2: Setting the Issue

CAT is flexible to register the issue with customized fields, which is executable by the employee user with administrator authority.

2.1 Issue Management

It is possible to manage types, customized fields, status, and common fields. Please refer to following steps to move to the operation screen.

(1) Press the Issue Management in the drop-down menu shown by clicking the setting icon.



(2) The user can manage types, customized fields, status and common fields on the issue management screen.

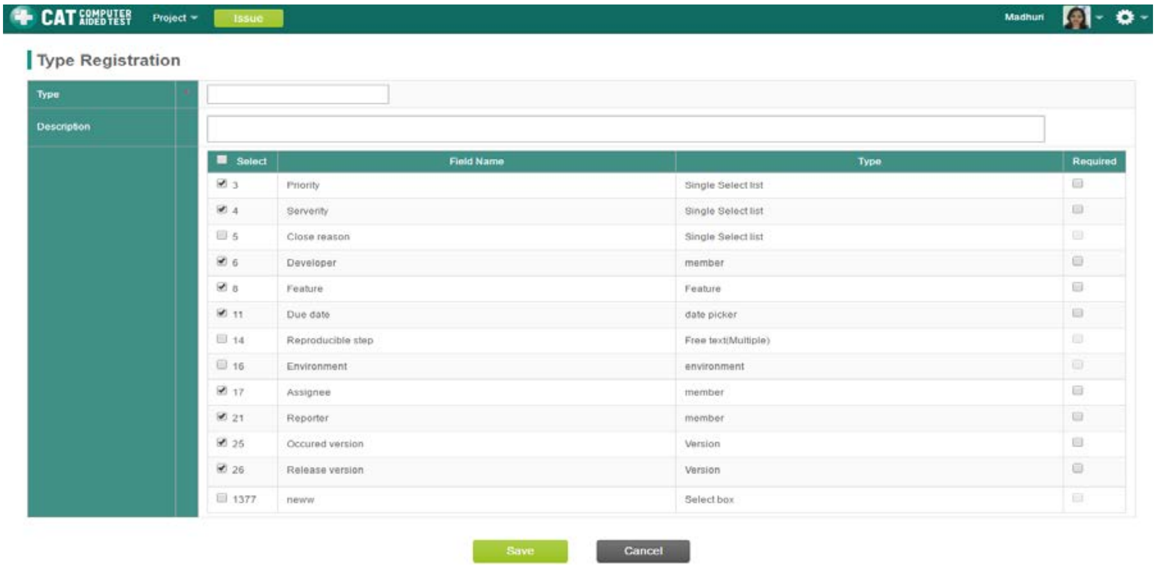
2.1.1 Register a New Issue Type

The user can register, edit and delete an issue type with the issue type management function. Besides, it's also possible to do some operations on the issue type in detail such as linking the customized filed to a type, setting required items or setting the issue type in detail.

(1) Please click "Issue Type Management" on the issue management screen.

(2) Press "New" Button.

(3) Select those fields to be used and required.
Enter the type name and its description and click the customized field to be used. Click the box on the right side for making the customized field required and remember to press the "save" button finish the editing.



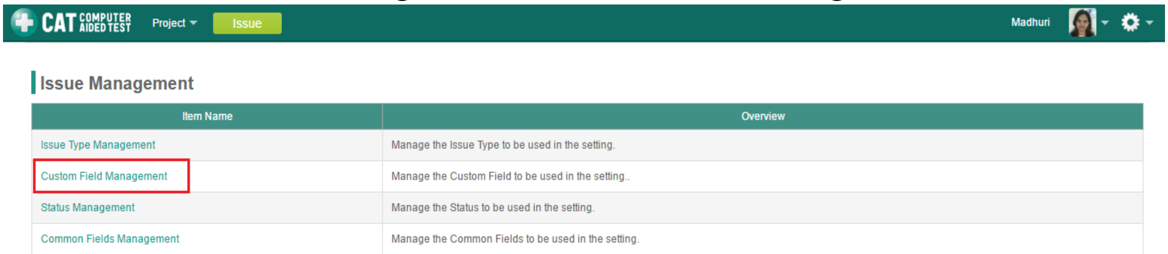
(4) It will move to the Issue Type Management screen if settings are successfully saved. The user can do various kind of editing by clicking the type name on the Issue Type Management Screen and delete a type by clicking the Delete button on the right side.

※ Those types currently in use can not be deleted.

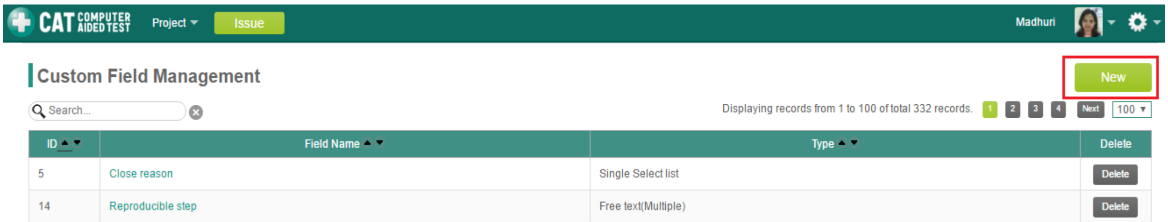
2.1.2 Register a New Customized Field

The user can create, edit and delete a customized field on Custom Field Management screen. This chapter illustrates the way of creating a new customized field.

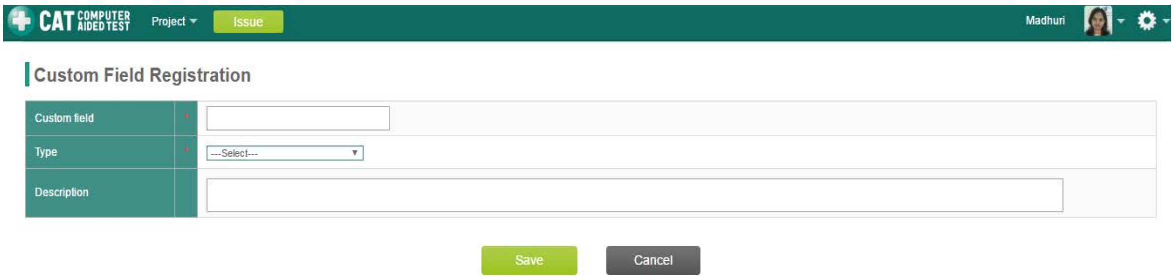
(1) Press the “Custom Field Management” button on the issue management screen.



(2) Press the “New” button.
Press the “Delete” button on the right side to delete the customized field you’d like to remove.



(3) Enter the field name, the type and edit its default value and enter the options, then press the "save" button.



※When editing the "Description" section, the "i" icon which shows the description while the pointer is hovering around on the right side of the issue registration screen.

[Overview of Customized Field Types]

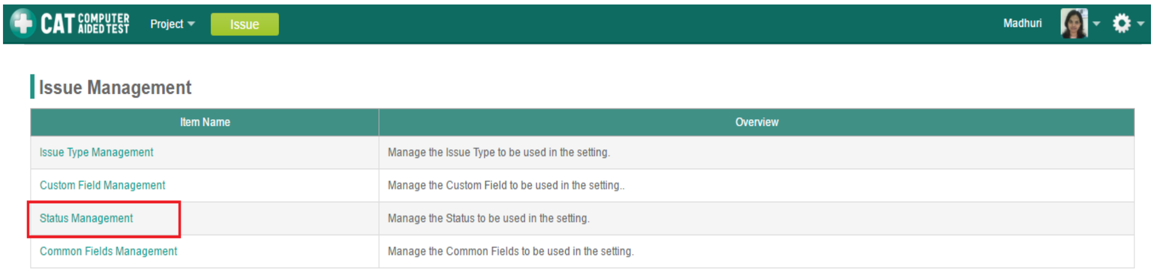
The user can select a custom field type as below and please notice that those types vary depending on the existence of the default value.

Type	Description	Initial Value
Multiple Choice List	The Combo box to make a selection from defined options.	Yes
Multiple Choices List	The List box to make more than one option from defined ones.	Yes
Test Box (Single Line)	One line text box.	Yes
Test Box (More than one Line)	Multi-line text box.	Yes
Check box	The check box for defining the true/false.	Yes
Radio Box	The radio box in which the user can make a choice from defined options.	Yes
Selected Box	The text box that can register the text and those can be searched in the unit defined in the project.	Yes
URL	The text box that shows the link.	Yes
Member	The combo box that allows the user to select a defined team member.	No
Date	Text box with calendar input assistance.	No
Date (Time Picker)	Text box with calendar input assistance.	No

2.1.3 Register a New Status

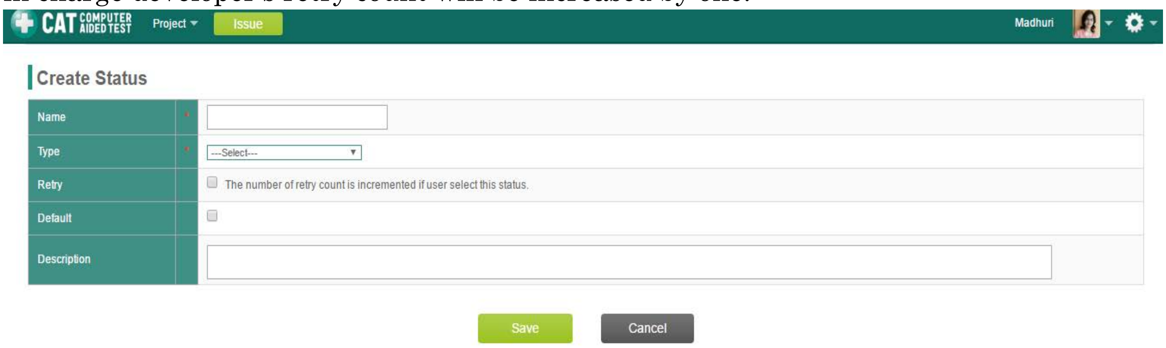
With status management, the user can create, edit, and delete the status of each type.
This section illustrates the new way to do the registration.

(1) Press the status management button on the Issue Management screen.



(2) Press the “New” Button.

(3) Enter the status name, type and please notice that entering the Retry flag(※), initial value and description are required. Then press the “save” button after the operation.
※ If the user change to a status with the Retry flag, the issue’s retry count as well as the in charge developer’s retry count will be increased by one.

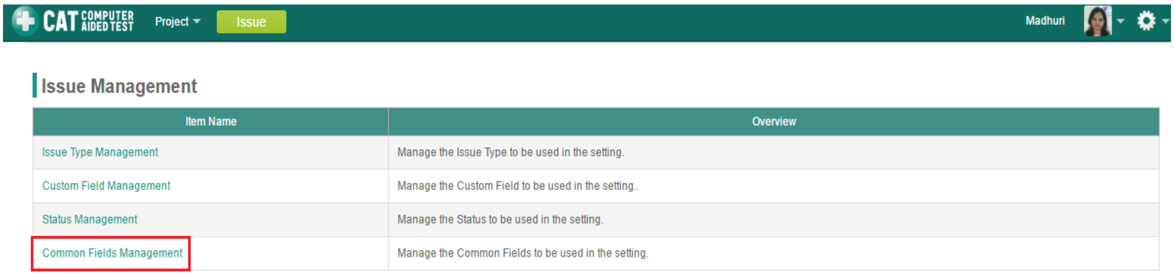


(4) Press the save button and return to the status management screen. Move to the status’s edit screen where the user can edit the preserved content by pressing the status name link. The status can also be deleted by pressing the delete button.

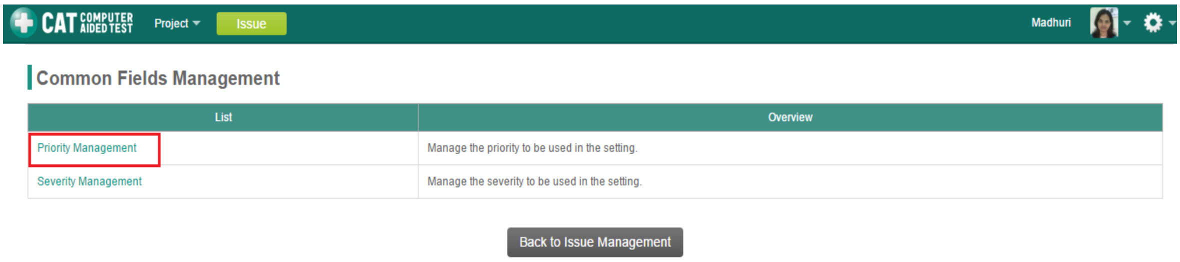
2.1.4 Register a New Priority

The priority management and severity management are available in the common field management. This section illustrates the way to set up the new priority.
※ Please also refer to this section for knowing how to set up the new severity.

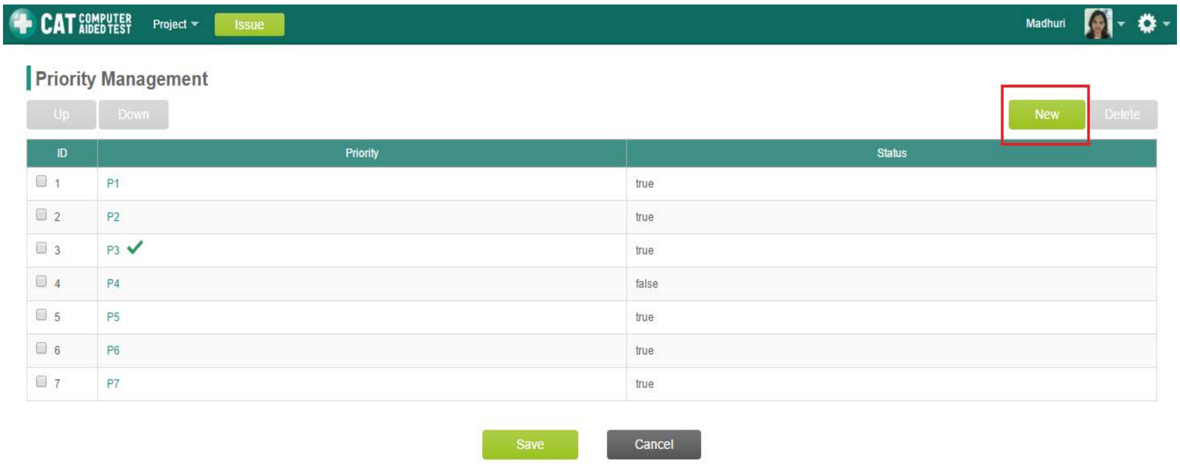
(1) Press the common field management button on the issue management screen.



(2) Press the Priority Management.

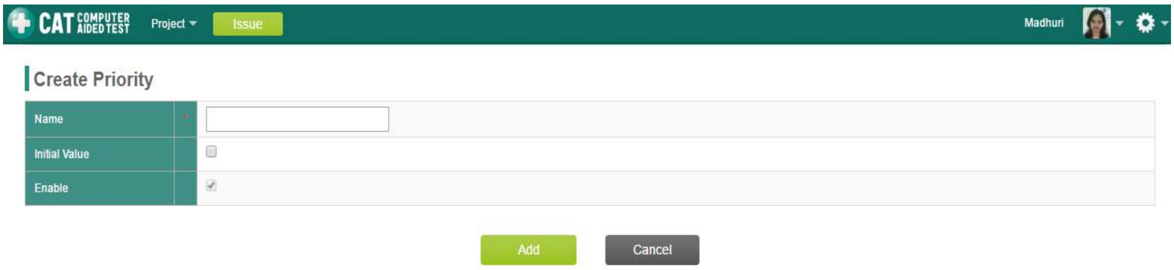


(3) Press the “New” button.



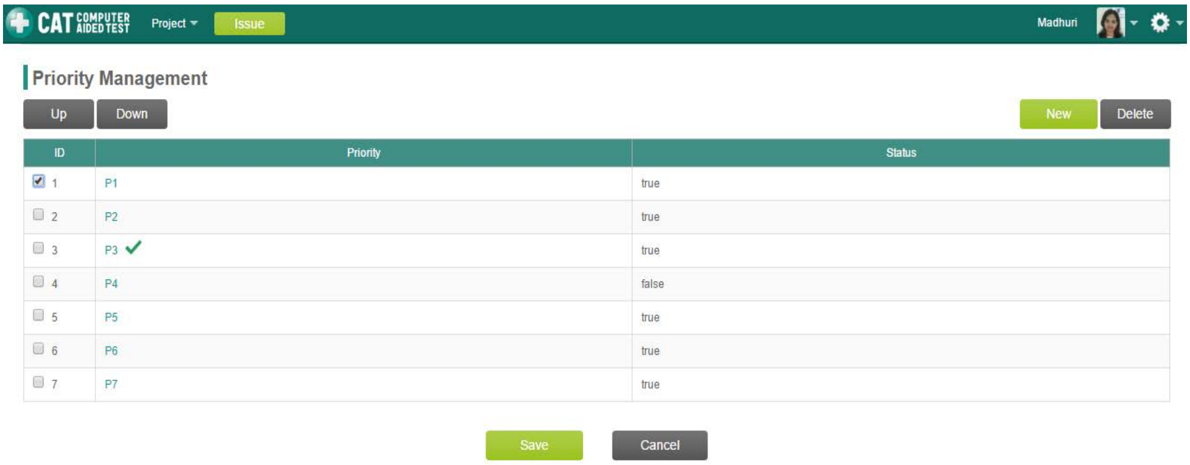
(4) Press the "Add" button after entering the priority's new tag name and any necessary settings.
・Tag's Initial value: When the check box is on, it will be used as the default value for issue registration.
※ The initial value set for other tags will be invalid.

・Tag's Validation: The priority tag can be invalided by unchecking the "Enable" check box. Then the user can delete the tag from input items without changing the past data.



(5) Adjust the display order.
The display order can be adjusted on the Priority Management screen by utilizing the Up and Down button after activating them through clicking the check box in ID column.
※ Those tags with check box on are delectable with the delete button

Please press the "Save" button to preserve all finished editings.



2.1.5 Link the Customized Field and Others to a Type for each Project

Set up with following steps when you need to set the type, customer field and issue for each project:

① Issue Setting Management
Set up types and custom fields according to the procedures above. Please notice that settings for each item here are for the whole system, which will not be reflected on the project.
(Refer to steps 1~6 below for reflecting the setting to the project)

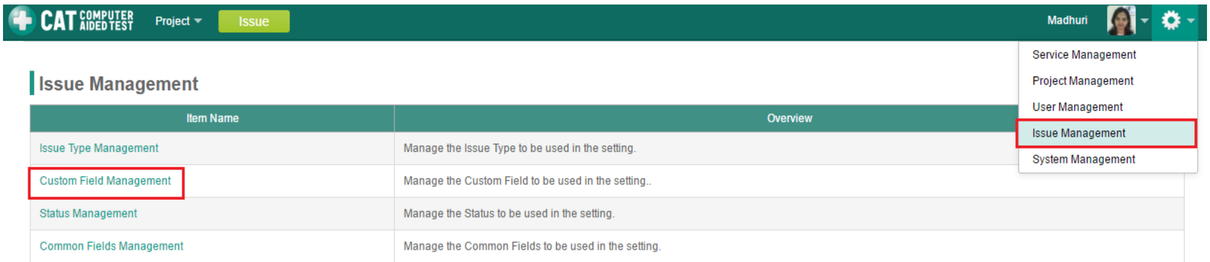
② Project Management> Project Setting> Issue Setting
Here the user can set up suitable items from items which already set up in the system.
(Refer to steps 7-15 below for reflecting the setting to the project)

③ (Option) Service Management> Settings for each service> Issue Template Setting
The default issue settings will be used with issue template when the project is created. The setting finished here will be reflected in projects created afterward.
(By setting the issue template, you can do steps 9-14 or sth equivalent for reflecting settings)

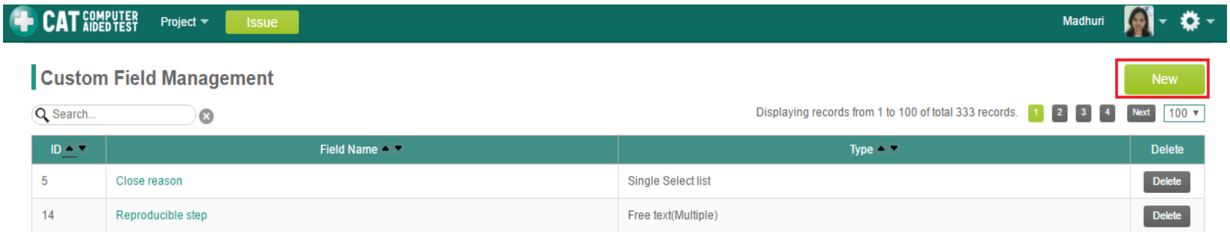
We will explain steps for reflecting settings to the project with an example of creating a custom field.

【Steps for reflecting the custom field to the project】

1. Open Issue Management and click custom field management.

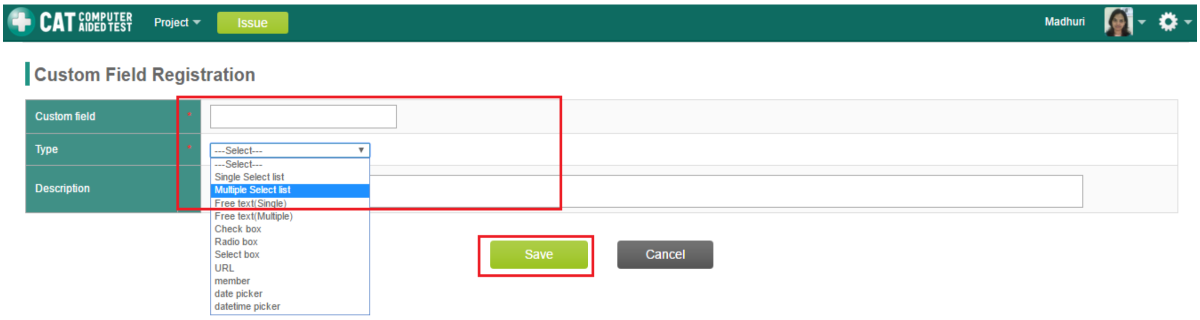


2. Check if the item you'd like to add to the custom field management exists.

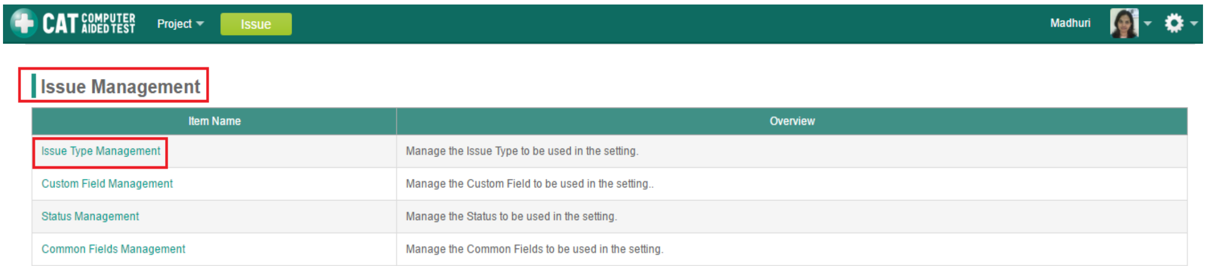


Press the "New" button if it doesn't exist, and jump to step 4 if the item is already there.

3. Enter the custom field name, type, description, and press the save button.
Confirm the item to be added to the screen shown in step 2.

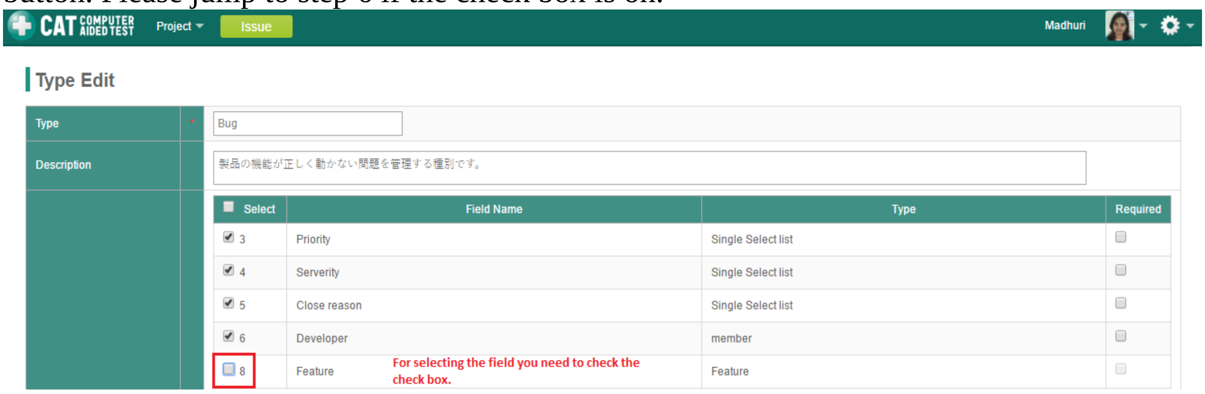


4. Click the issue type management on the issue management screen returned from the custom filed registration screen.



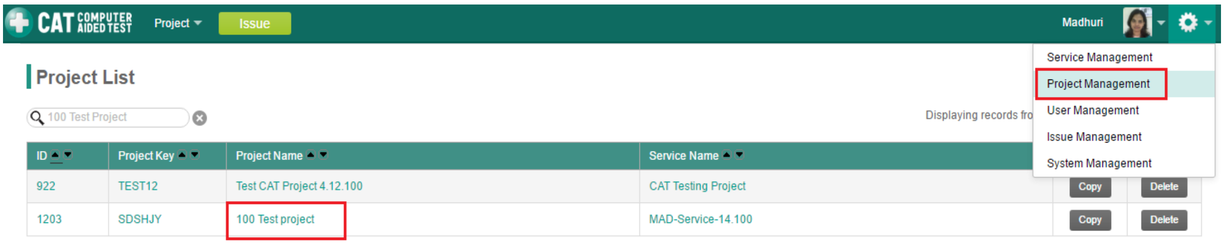
5. Select the type of issue you'd like to add to.

6. Click the check box of the item you'd like to use on the type edit screen and press the "save" button. Please jump to step 6 if the check box is on.

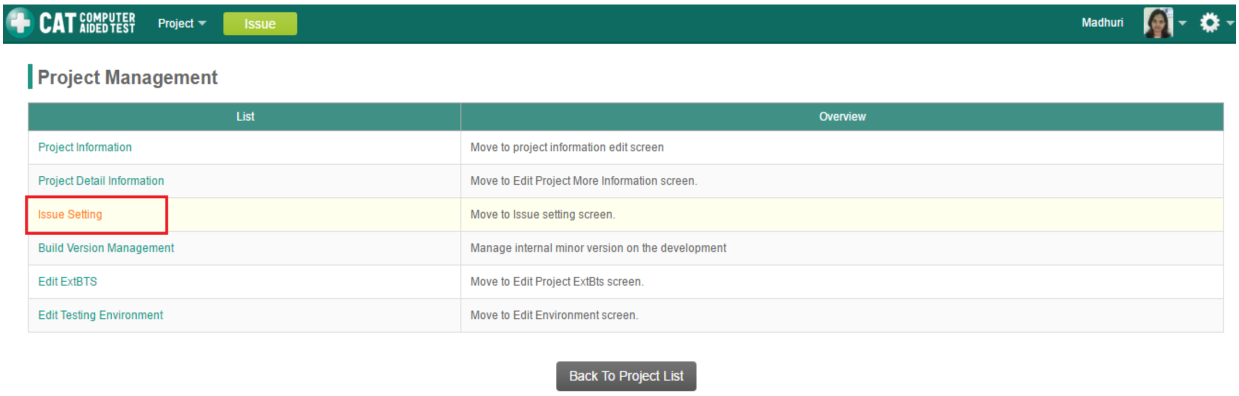


※Set the "Required" check box on for making it "must have" item for the issue registration.

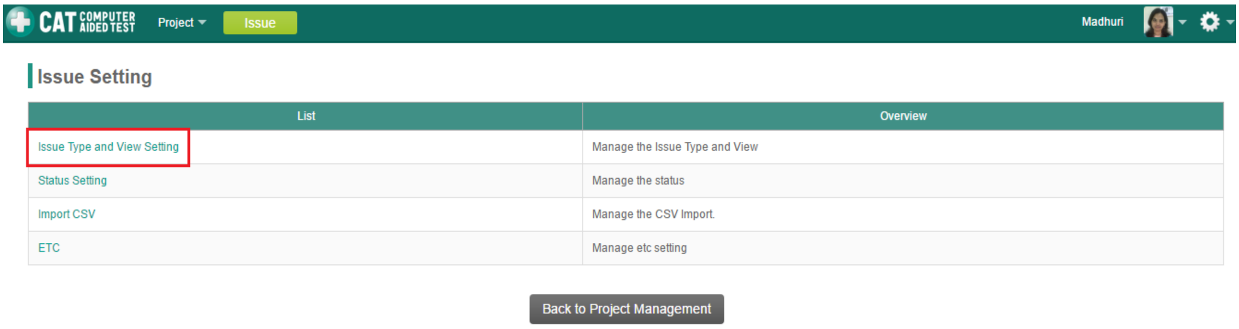
7. Go to Project Management and select the project you'd like to reflect to.



8. Click “Issue Setting”.



9. Click “Issue type and view setting”.



10. Select the issue type you’d like to add to.

11. Press the “Select Type” Button.

12. Set on the field check box that you’d like to add and press the “OK” button.

13. Return to the item display setting screen, the order of selected items can be adjusted by pressing “up” and “down” button. Then press “OK” button to save changes.

14. Press the “save” button on the “Issue Type and View Setting” screen.

15. Confirm fields you’d like to add through pressing issue button.

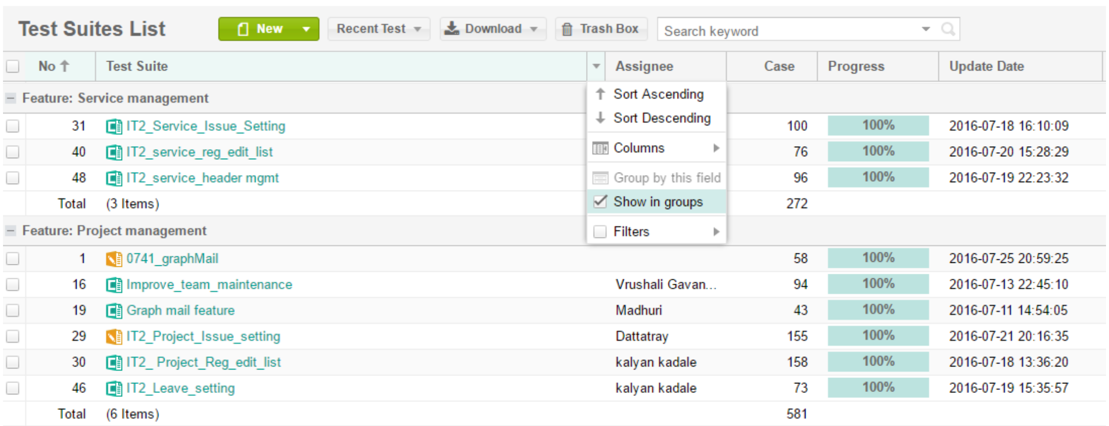
Chapter 3: CAT Analysis

CAT is able to do the progress management as well as the analysis to diagnose the progress of each test suite, which requires proper service and project settings. This chapter illustrates analysis related settings. Please refer to contents that cover “Service Management” and “Project Management” after this chapter for knowing more about how to do the detailed setting.

CAT can make the following analysis based on the data of connected test suite.
[The place for enabling each item is in the setting that allows the user to register the test suite]

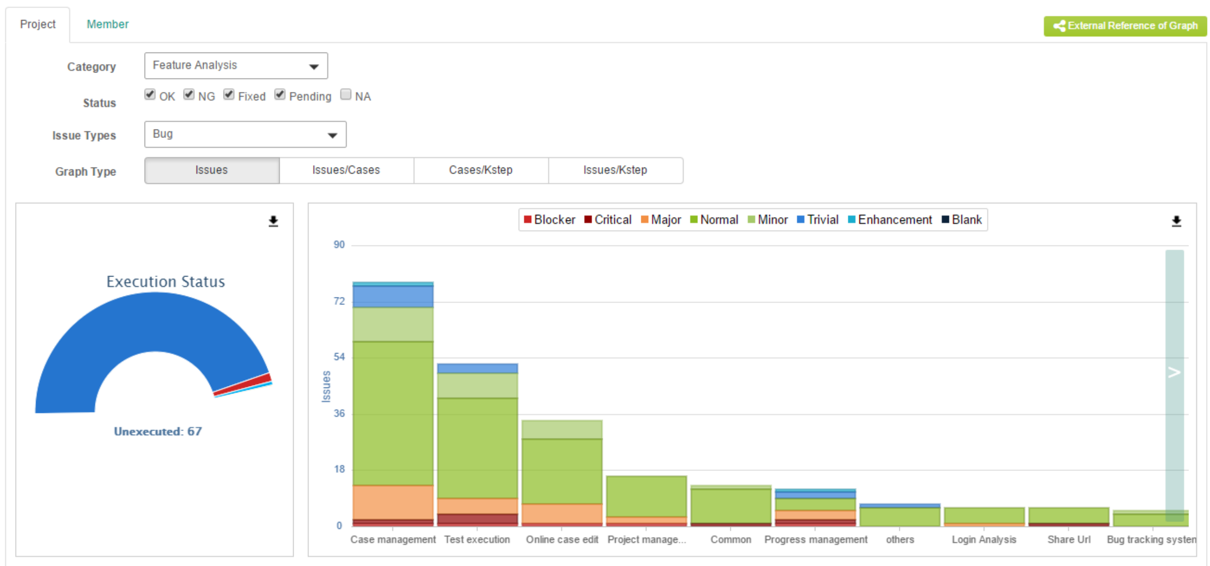
Where each item can be enabled						
#	Item Setting	Screen Setting	Test Management	Progress Management	Bug Management	Analysis
1	Feature	Service Management > Basic setting	Data Aggregation Filter	Data Aggregation Filter	Data Aggregation Filter	Bug analysis feature
2	Test Type	Service Management > Testing Basic setting	As Above	As Above	—	—
3	Custom Field	Service Management > Testing Basic setting	As Above	As Above	—	—
4	Execution Row environment	Project Management > Edit Testing Environment	—	—	Data Aggregation Filter	Bug analysis Environment

① Data Analysis for Test Management, Bug Management, and Progress Management.
It’s possible to present common features as below on the screen that shows Grid.
A. Item Filter.
B. Item Subtotal (grouping).
※ When the number is presented in subtotal for each function.

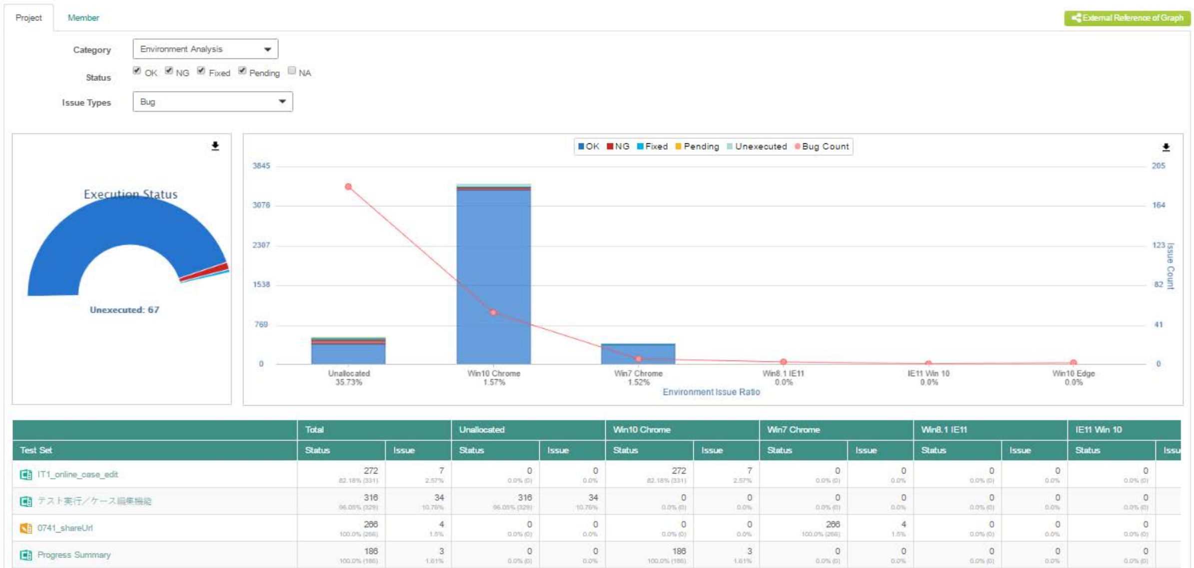


② Issue Analysis.

※ Issue - Feature Analysis



※ Issue- Environment Analysis



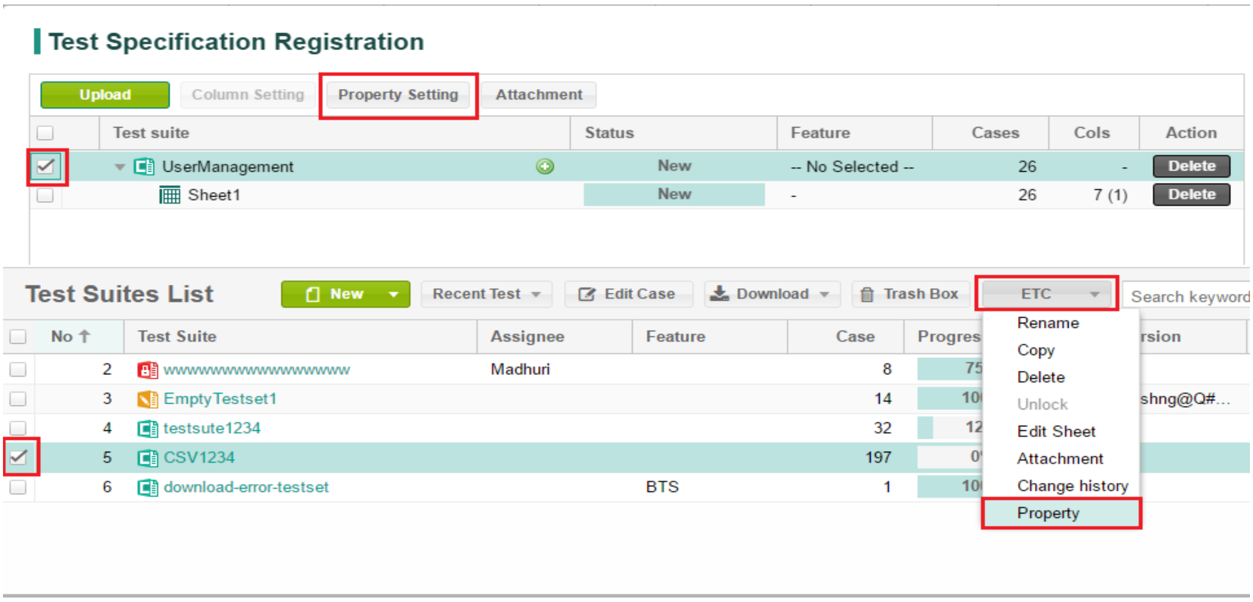
3.1 Link the Feature, Testing Type and Custom Field to a Test Suit

It's possible to connect and assign the feature(※), test type(※) and custom field to a test suite when creating it on the test management screen.

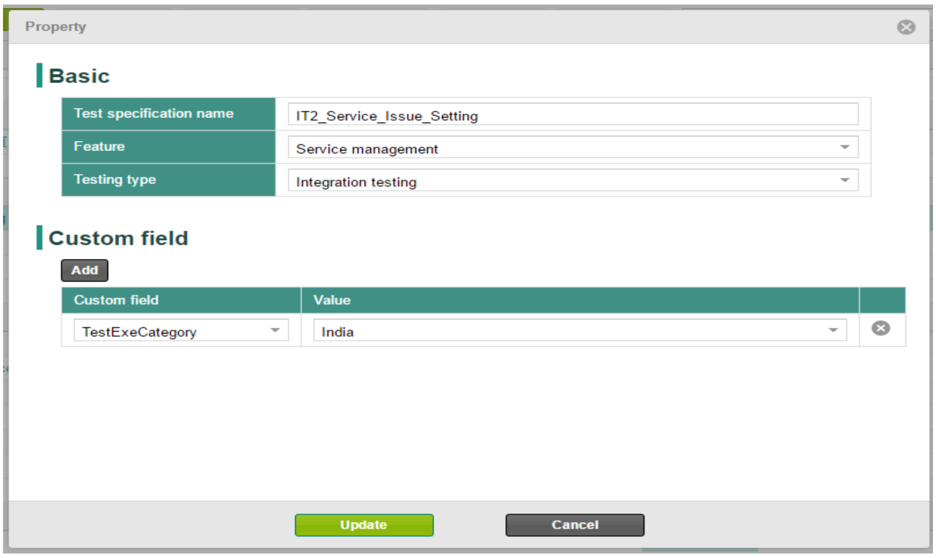
※ Please refer to [4.1 Create a new service] since defining the service setting in advance is required.

[The way to set up - Feature, Test Category and Custom Field]

1. Select the test suite and press the “Property Setting” button on the test specification registration screen or test suites list screen.



2. Register settings for each item by pressing the “Update” button.



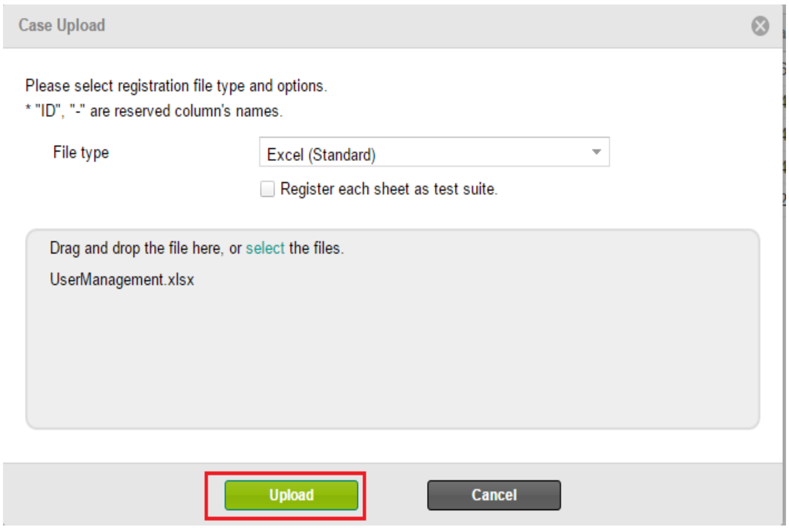
3.2 Connect a Test Environment to the Execution Column

The user can understand the situation about which environment that the problems occur by connecting the environment to the test execution column. Please refer to setting steps below.

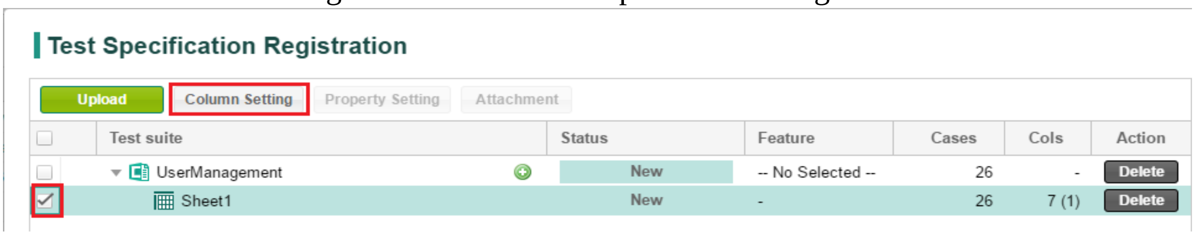
① Register the test environment in the project when registering the test environment 5.5.

② Set up the test environment in the execution column on test case registration/edit screen. When a type is with the execution column, it’s possible to select one of test environments registered in step 1 by clicking the combo box on the left side.

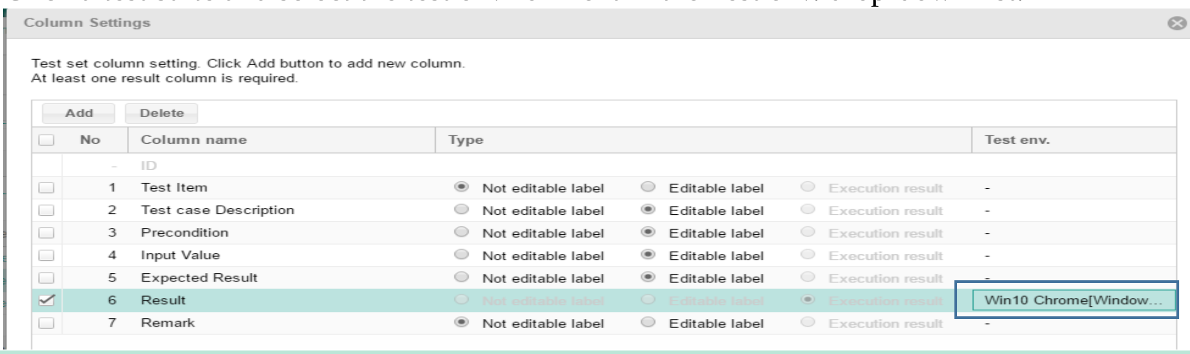
1. Upload the New Test Suite.



2. Press the “Column Setting” button on the Test Specification Registration screen.



3. Click a test suite and select the test environment in the Test env. drop-down list.



3.3 Link the Feature and Environment to an Iuuse

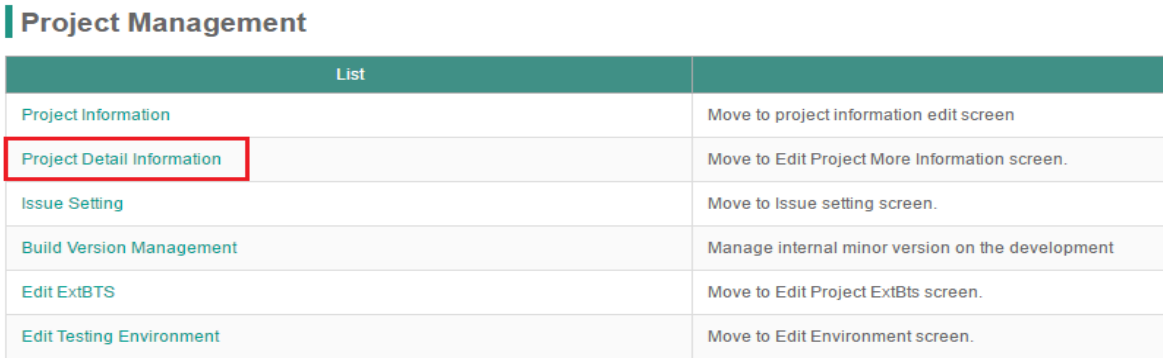
When there are features and environments connecting to a test suite, these settings will automatically utilize when registering an issue from the test execution column and it also applies with external BTS.

It is also possible to set up manually after registering the issue.

3.4 Register Function Steps to each Function

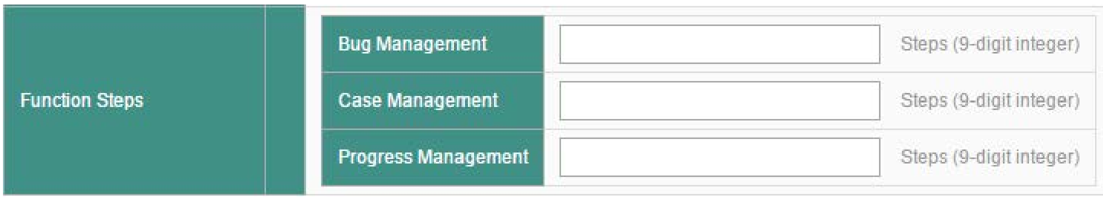
Enter the number of implemented code lines.

① Display the project management screen and click “Project detail information”.


Project Management

List	
Project Information	Move to project information edit screen
Project Detail Information	Move to Edit Project More Information screen.
Issue Setting	Move to Issue setting screen.
Build Version Management	Manage internal minor version on the development
Edit ExtBTS	Move to Edit Project ExtBts screen.
Edit Testing Environment	Move to Edit Environment screen.

② We can view all functions and enter the number of effective steps in the of “Function Steps”.



※ Half-width character is required for this field so please remember to turn off switch off Japanese input (IME) while entering.

③ Press the “register” button to save all changes.

Those necessary preparations for the analysis would be ready after above steps.

Chapter 4: Service Management

This chapter shows steps for creating a new service. As for service editing, please refer to [2. Service editing] in [4. Project Management Settings].

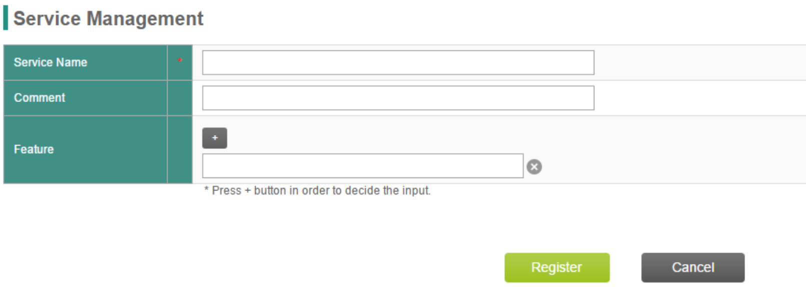
4.1 Create a New Service

Please do following operations for creating a new service.

(1) Click the Service Management on the drop-down menu shown by mousing over the setting icon.

(2) Press the “New Registration” button on the service list screen.

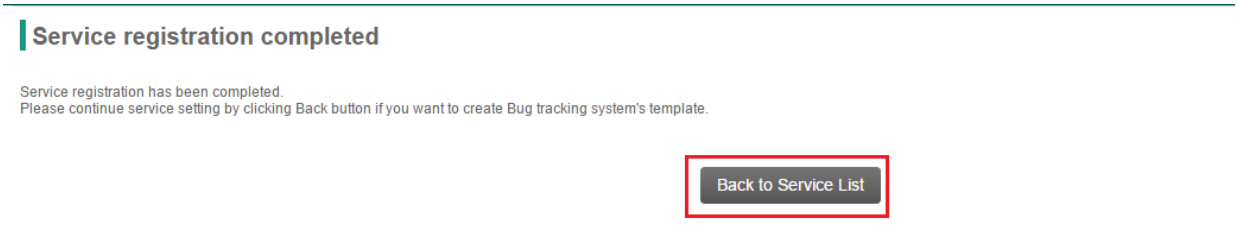
(3) Press the “Register” button after the entering. In the following figure, the new row for the feature appears pressing “+” button.



[Descriptions for each item]

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Service Name</td><td>Enter the service name.
※ Following characters cannot be used as the service name. "* |:" <>?;, + = $% &} "</td></tr>
<tr><td>Comment</td><td>Enter comments on the service management screen.</td></tr>
<tr><td>Feature</td><td>Enter the feature that comprised in the service and set up its test suite's property. It's possible to do the project quality analysis after the setting up, viewing the number of issues per feature and the issue density corresponding to the test case.
※ Press '+' button to add the input field.</td></tr>
</table>

(4) Following message will appear after the registration, please press the "Back to Service List" button to go back to the service list screen. For editing the issue template, please refer to [2.2 setting the issue's template].



4.2 Setting the Service

There are many different settings including in the menu below.

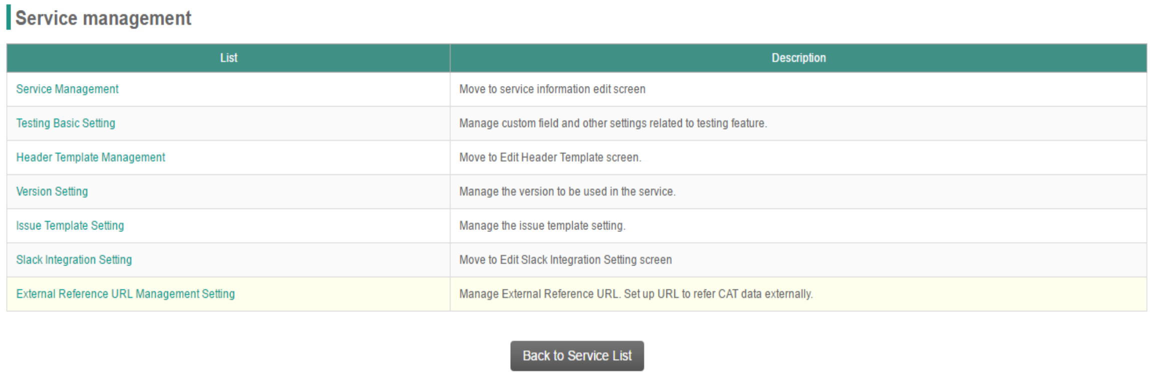
- Service Management
- Testing Basic Management
- Header Template Management
- Version Setting
- Issue Template Setting
- Slack Integration Setting
- External Reference URL Management Setting

We will illustrate the way to show the service menu first.

[The way to show the service menu]

(1) Click the service you'd like to edit on the service list.

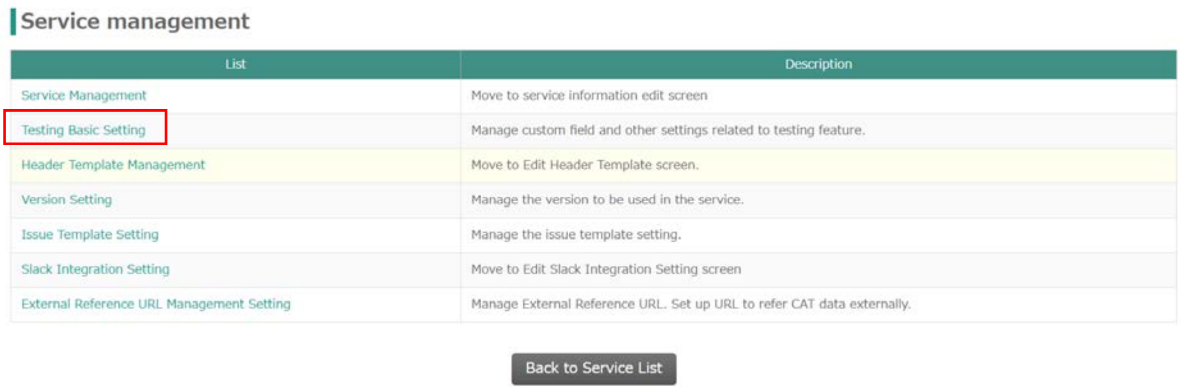
(2) Here we have the service management screen in detail, please refer to below test suite basic settings (as for settings for slack connection, please refer to [7.7 Setting the Slack connection])



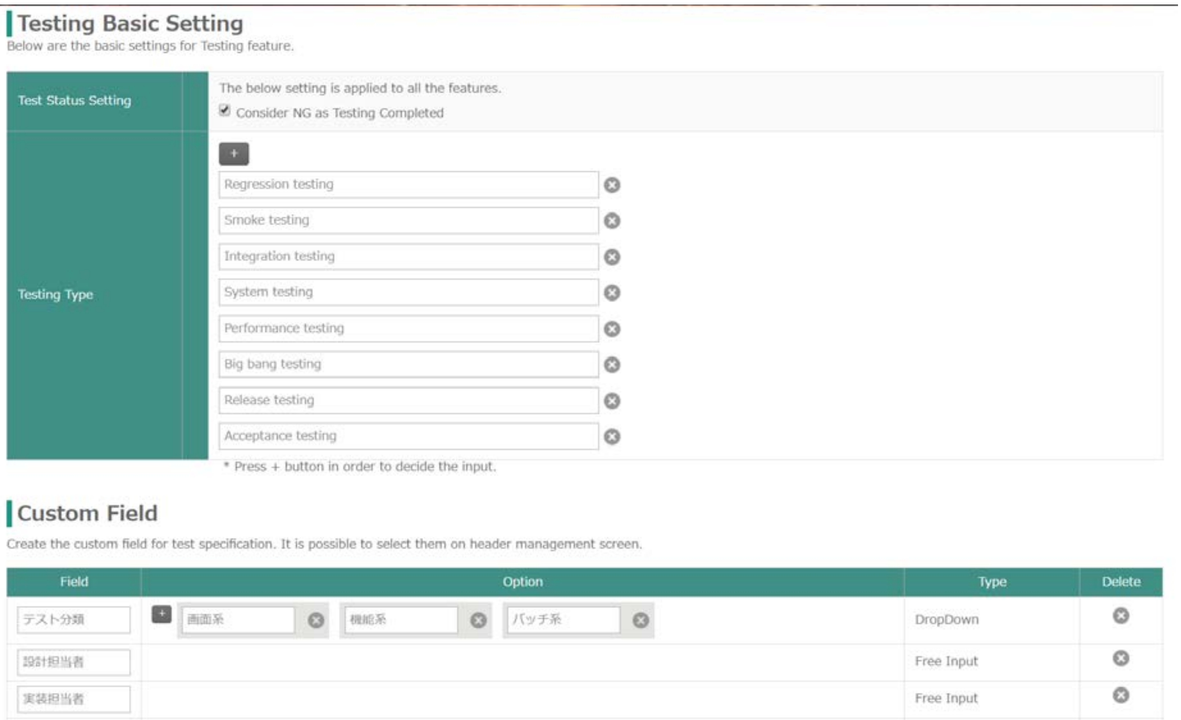
4.2.1 Basic Test Settings

It's possible to set up the test progress item (including NG or not), the category of the test suite property (testing type and custom field) in the project of a service.
After a service is created, please edit these items necessary even it's now in the way of process editing.

(1) Click the "Testing Basic Setting" on the service management screen.

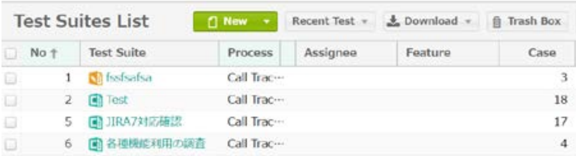


(2) Set up each item on the testing basic setting screen.



[Explinations for each item]

Item	Description
Test Status Setting	If you click the item "Count NG as the executed testing case", it's possible to set up whether to count NG cases into those executed on each screen.
Testing Type	The testing type can be registered in the project property setting. On test suites list screen shown after the testing type setting is finished, the user can view the test suites list with functions such as the filter and the grouping. • Test Management > Test Suites List • Progress Detail > Progress TestCase Detail (tab) > Test Suites List ※ Press the "+" button to add the input column
Custom Field	It's possible to define the field that can be set up in the property of a test suite. Show the test suites with the filter and grouping on the next screen. • Test Management > Test Suites List • Progress Detail > Progress TestCase Detail (tab) > Test Suites List Selecting the tab in the drop-down list or inputting is possible. For those selected from the drop-down list, please enter the option name. ※ Press the "+" button to add the column for the item name, option name or tab for inputting data.

	By setting the custom field in the test suite to mark the review status (such as not review, reviewing and review finished), the user can utilize these settings on each screen. [Test Management] > Picture of the test suites list screen 

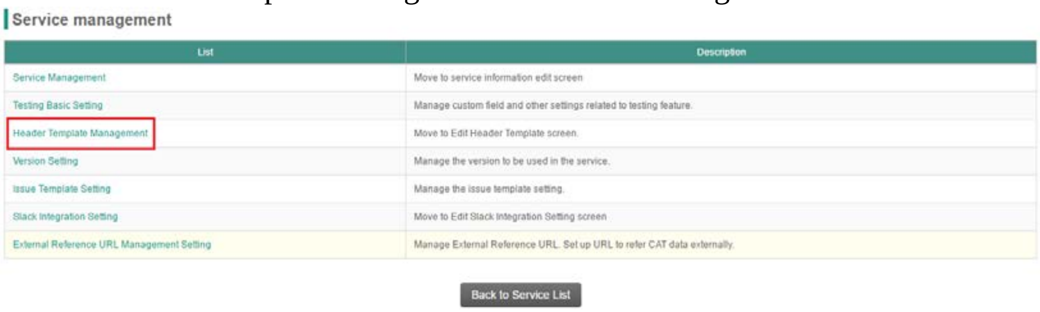
[Those functions and screens that reflect the setting of “take NG as a finished testing case”]

Function & Screen	Location	Affected Items
Project Top	Summary	Executed, overall progress, scheduled progress, today’s progress and expected cases to finish.
Project Top	Test status	Executed.
Test Management	Test Suites List	Progress.
Test Execution	Progress Confirmation	Execution status.
Progress Summary	Graph, table	Executed, Unexecuted, Progress rate.
Progress Detail	Table	Unexecuted, progress rate
Project Mail	-	Executed, overall progress, scheduled progress, today’s progress and expected cases to finish.

4.2.2 Header Template Settings

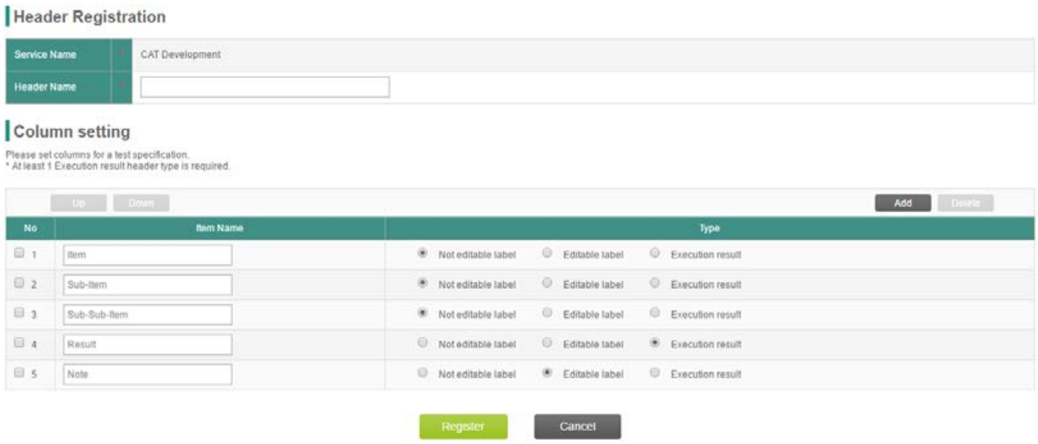
This chapter illustrates the way to make the header template for the test suite header. The header template can be utilized when creating the new test suite if it was saved in advance.

(1) Click the header template management on service management screen.



(2) Press the “New Registration” button on the header template management screen.

(3) By setting up the header template for test suites, it can be used when creating the test suite for the project under the service. Press the “Register” button to save all changes to the setting.

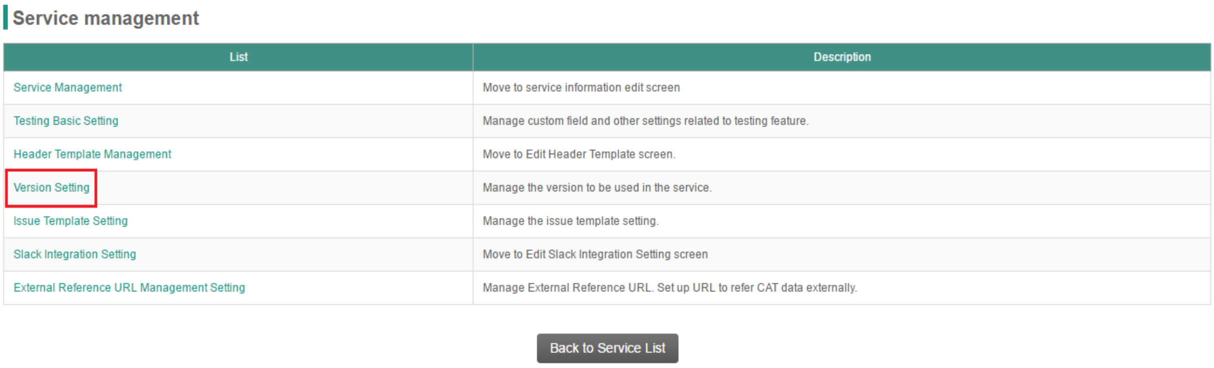


Item	Description
Header Name	Input the name of the header template.
Custom Field	By selecting the custom field added when registering services, it would be possible to classify the test suite.
Display Column Settings	The user can select the header and type of the test suite. There are three types available below: ● Non-editable label: Input the test case description which is non-editable on the test execution screen. ● Editable label: Input the test case description which is editable on the test execution screen. ● Execution result: Input the execution result of the test case.

4.2.3 Version Settings

By registering the version of the product or service to be developed in advance, the user can utilize it while managing projects or tasks. This section illustrates the way to set up a service version.

(1) Click "Version Setting" on the service management screen.

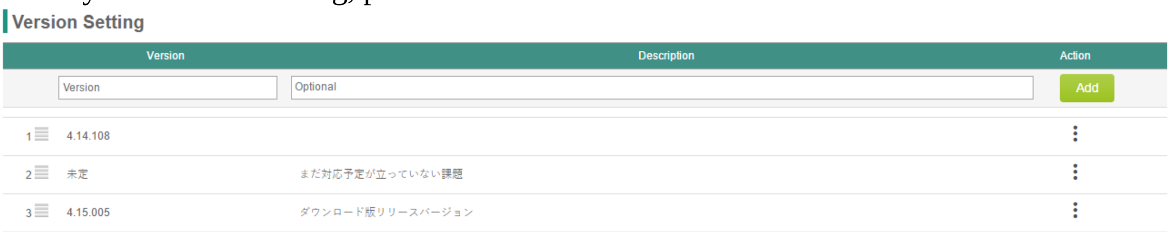


(2) Enter the version & description and press the “Add” button to add a new version. The version registered here can be shown when registering an issue while it is not under projects of current service. Besides, It’s possible to connect the version to the process on the project setting screen (will refer it later) and do the issue registration with it as the initial value.

(3) Change display order.

It is possible to change the version display order on the version setting screen by drag and draw the row to a different position in the list. Besides, the “delete” option shown by pressing the dot button can be used to delete the version.

When you finish all editing, press the OK button and confirm all revisions.



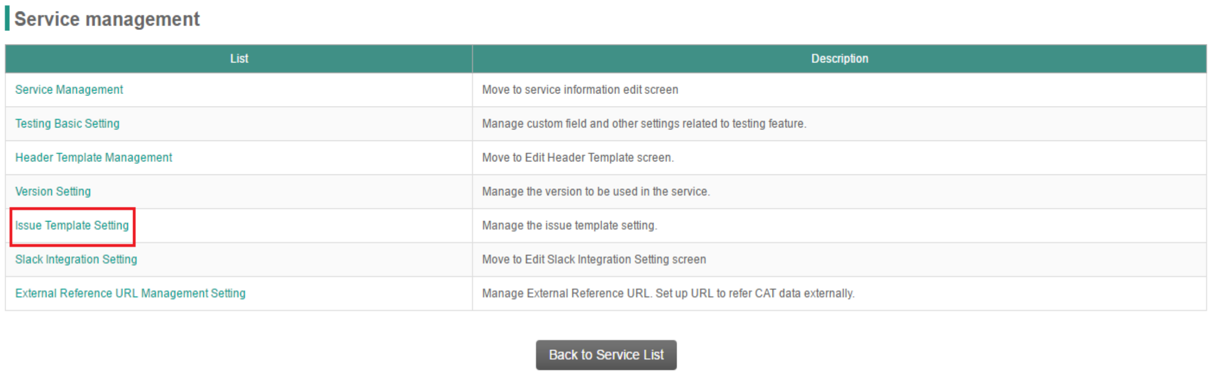
4.3 Issue Template Settings

This section illustrates the way to create an issue template. The issue template will be automatically imported and used as the initial value when creating a project, which will not affect the existing issue settings.

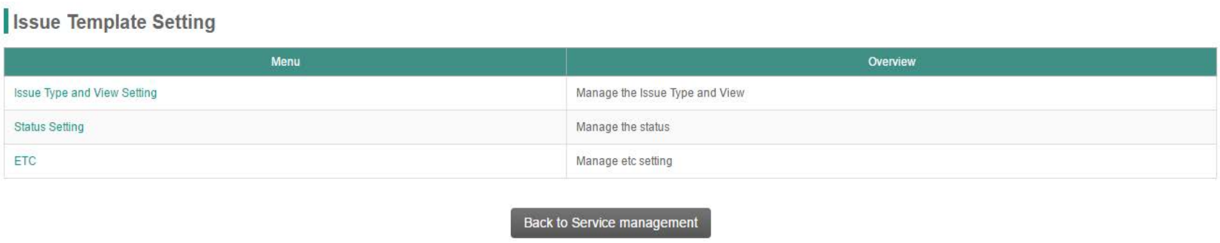
[Show the Menu of the Issue Template]

(1) Click a service you'd like to edit in the service list.

(2) Click "Issue Template Setting" in the list.



(3) Issue template setting screen appears.

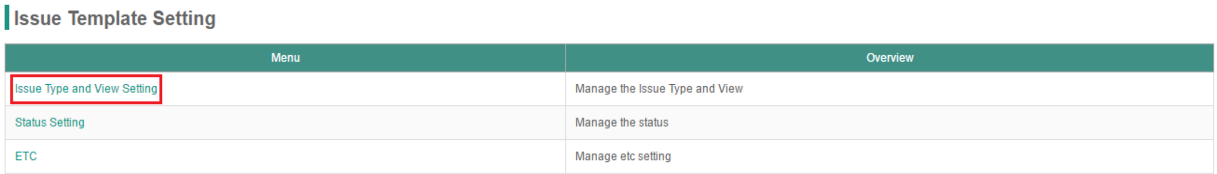


Following sections illustrate the setting of the type, field, status, and others (ETC).

4.3.1 Settings of the Issue Type and its Fields to Display

This section illustrates the way to set up the type and fields to display. The type, field and display order are settable in the project. Besides, the user can create a template that imports some values as the initial setting for creating the project.
※ Those initial values are editable when setting the project.

(1) Select the Issue type and view setting.



(2) Please press "select type" button after selecting the type to use.

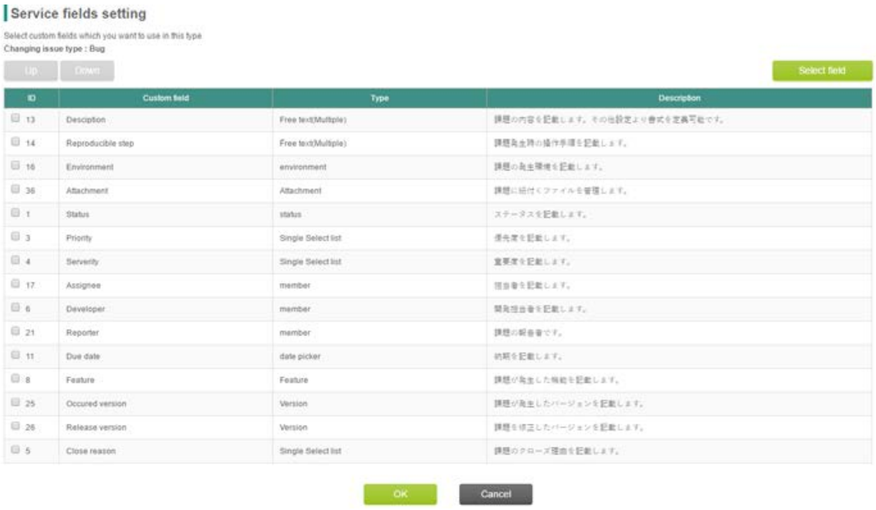
(3) Set those types’ check box in ID column on and press “OK” button to finish the type selection and return to the Issue Type and View Setting screen.

※ The user can disjoint the type by setting the checkbox off and press the OK button.

(4) Next, set up fields to display for selected types by clicking the type title on the Issue Type and View Setting screen.

(5) Setting the field display/hide and press “Select Type” button.

(6) Select the custom field and press the OK button.
- Summary and status field are required which the user can not hide.
- The user can unselect the field by setting its check box off.



(7) Settings of issue type's initial value and its display order will be displayed when registering an issue.

[Issue Type's Initial Value]
Select the type to display from the top-down menu of type's initial value.

[Display Order Setting]
Set the type's check box on to make it moveable so that its position can be rearranged by pressing the "Up" and "Down" button.

Press the "Save" button to save the revision.

4.3.2 Status Settings for the Issue Type

This section illustrates the way to set up the status corresponding to the issue type. Various kinds of status can be assigned to the type in the project and it's also possible to set up the template that automatically imports the initial value when creating the project.
※ Editing the initial value is allowed in the project.

(1) Click "Status Setting".

(2) On the setting screen with the current status list in the center, the user can select the status to utilize and select/unselect the status shown by pressing the "Select Status" button.

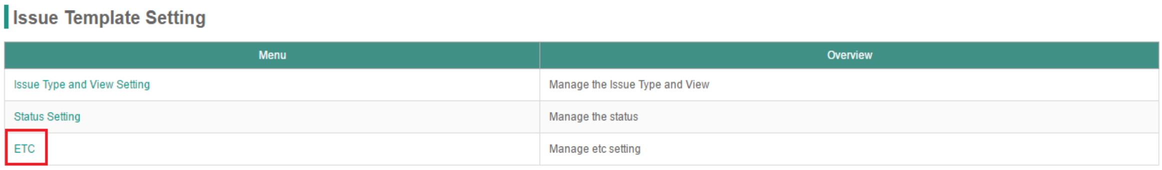
(3) Set those check boxs of the status you'd like to use on and those you don't need off.
※ Status "New" and "Completed" are required.

(4) Select the status you would like to adjust the order by setting their check box on and move them up/down by pressing the "Up" and "Down" button. Please press "Save" button to keep all current settings.

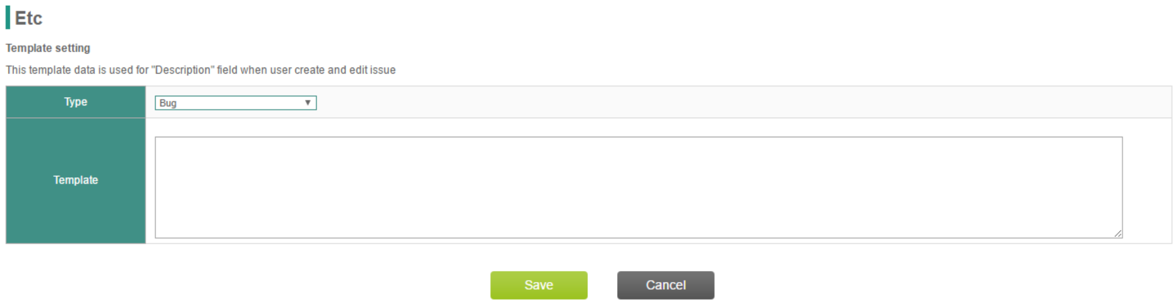
4.3.3 Other Settings (ETC - Template Format Settings)

Those issue related settings are adjustable in “Other settings”.

(1) Click “ETC” on the Issue Template Setting screen.



(2) Setting the template wording is possible on the ETC screen, which the user can utilize as the summary format when registering an issue. Select an issue type you would like to edit and make a template for it.



Press “Save” button to keep all current settings.

4.4 Share the External Graph

4.4.1 Enable the Graph Sharing

The user can share a progress graph URL that allows external viewing and analysis with those who didn't have a CAT system user account.

Only the user with administration authentification can share the graph when creating the project. After that, users with employee authentification can also share the graph with external URL.

(1) Service Management > Click the service to edit > External Reference URL Management Setting and open the shared URL settings.

(2) Set the checkbox on/off to enable/disable employee's authority to share the URL.

(3) All employees related to the project will have the authority to share the graph after the enabling.
※ above-mentioned employees can refer to, edit and copy the existing URL on this screen.

On the same screen, the user can check /delete all published shared external URL and its access log.

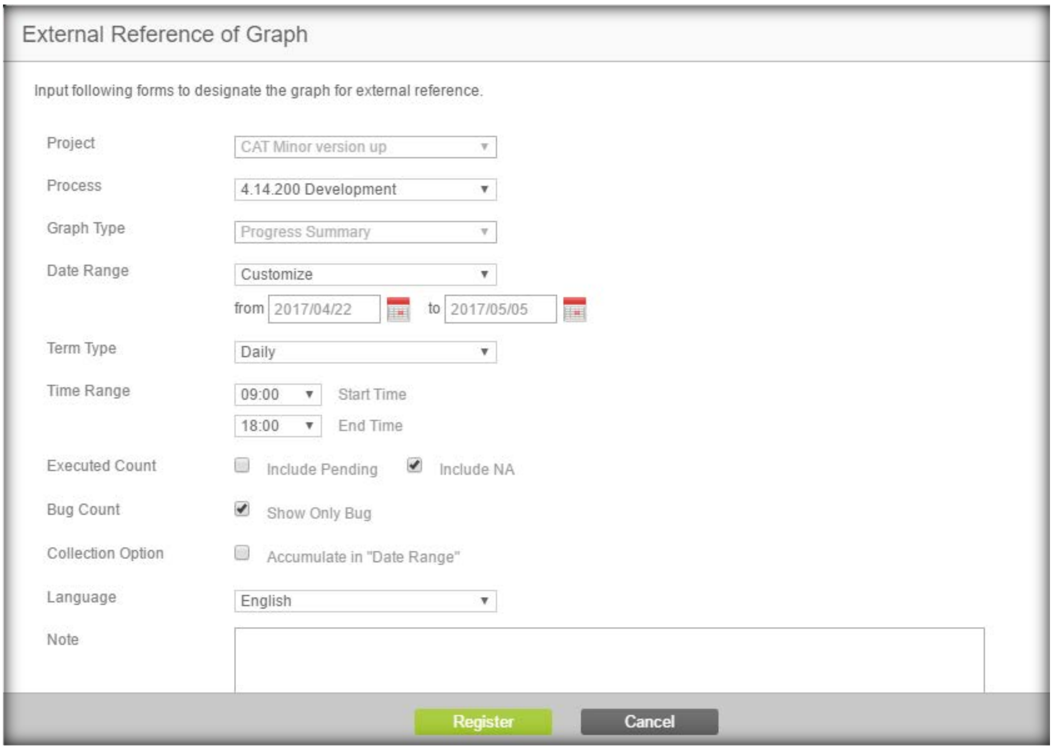
Each item

Button	Description
Employee URL Key	Grant the authentification to employee users that allows them to create a shared external URL.
New	Publish and share the URL of each graph.
Log	Check the URL access log of each graph.
Search	Search the summary of each URL.
Each Row	Contains editable description for the shared URL on the screen.
Copy	Copy to the clipboard of each URL.
Delete	Delete the shared URL and then it can not be referred from the outside anymore.

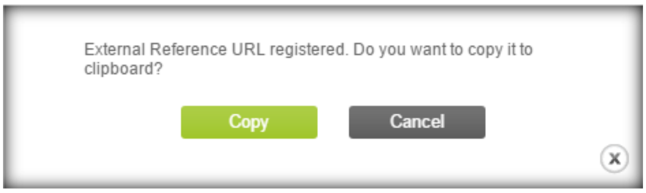
4.4.2 Share the Graph with Other System

(1) Press “External Reference of Graph” button.

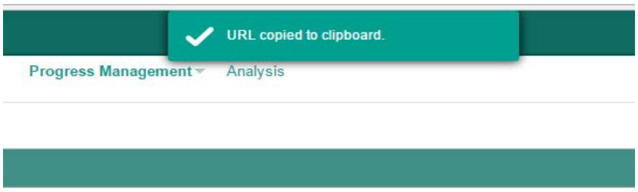
(2) Do the necessary settings for the graph and press “Register” button.



(3) Copy the shared URL by pressing the copy button in the confirmation message displayed.

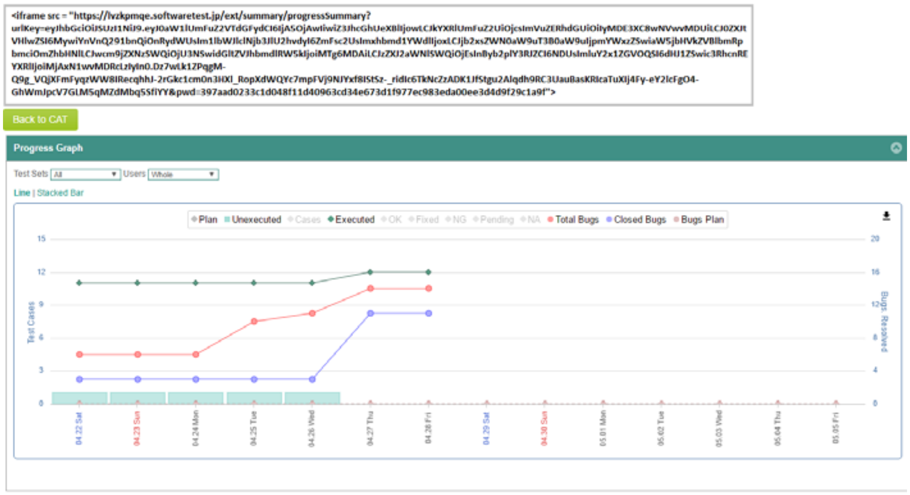


(4) The URL will be copied to the clipboard.



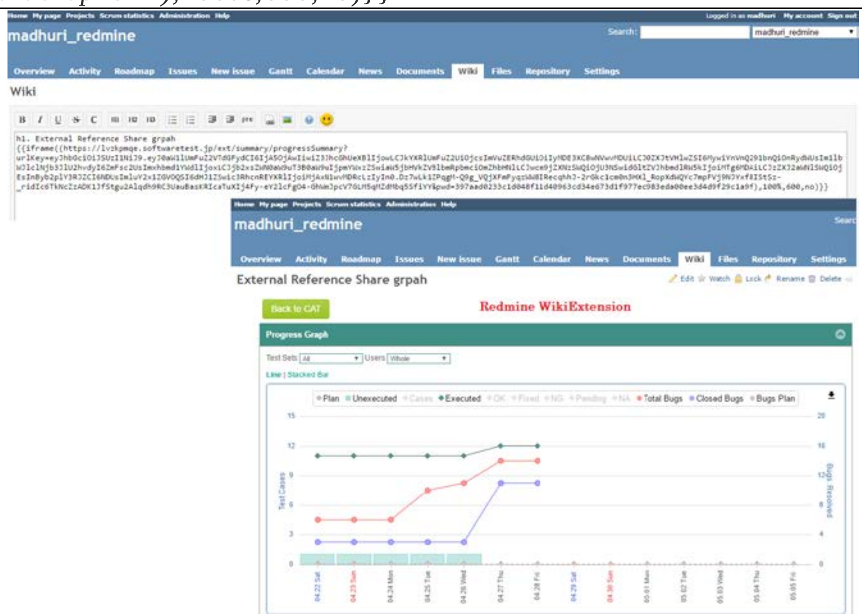
(5) Atlassian Confluence etc. Extract the URL and paste it into the system for the utilization.
Example (Atlassian Confluence): If you paste an Atlassian Confluence HTML macro with an URL like below to an iframe tag, then the graph will be presented in the display mode.

<iframe src="https://*(ShareGraphURL)*" noborder="0" width="100%" height="600" scrolling="no" seamless style="border:none;"></iframe>



Example (an example of Redmine WikiExtension): Next, paste the Redmine WikiExtension macro that contains various kinds of URL to the iframe and the graph will be presented.

{{iframe(*(ShareGraphURL)*,100%,600,no)}}



Chapter 5: Project Management

This section illustrates steps to create a project, which is operable either by the user with employee authentification or administrator. The service setting will be inherited when creating the project, and editing service setting will not affect existing projects.

5.1 Create a Project

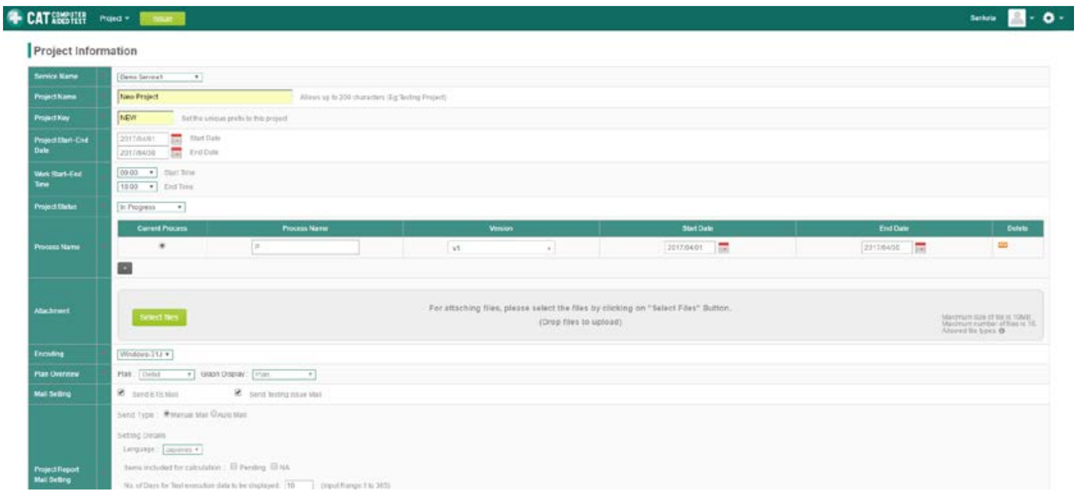
Here are steps for creating a project. Please refer to next section "Create a Project" for steps of setting up a new project and "Copy a Project" for copying all the current settings to create a new project.

5.1.1 Create a Project

(1) Choose Project Management from the tool button dropdown in the header.

(2) Press the "New Registration" button.

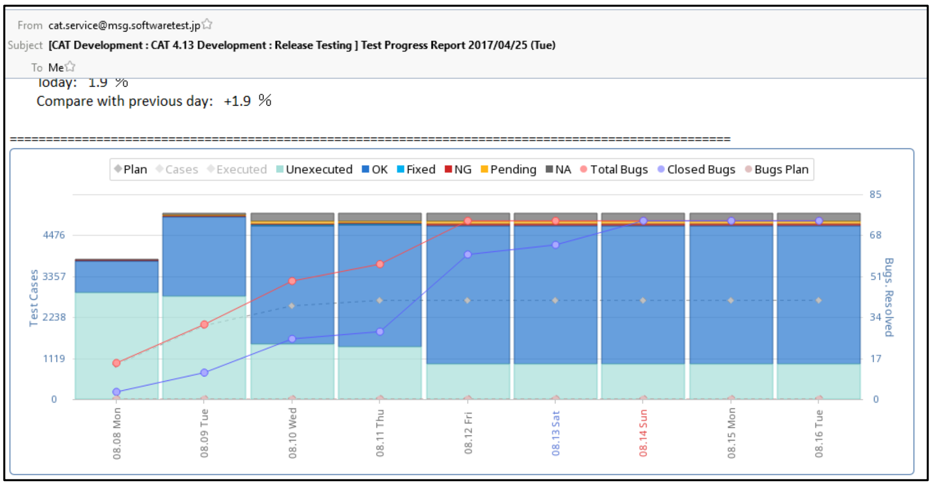
(3) Move to the lower side of the screen after entering the basic project information.



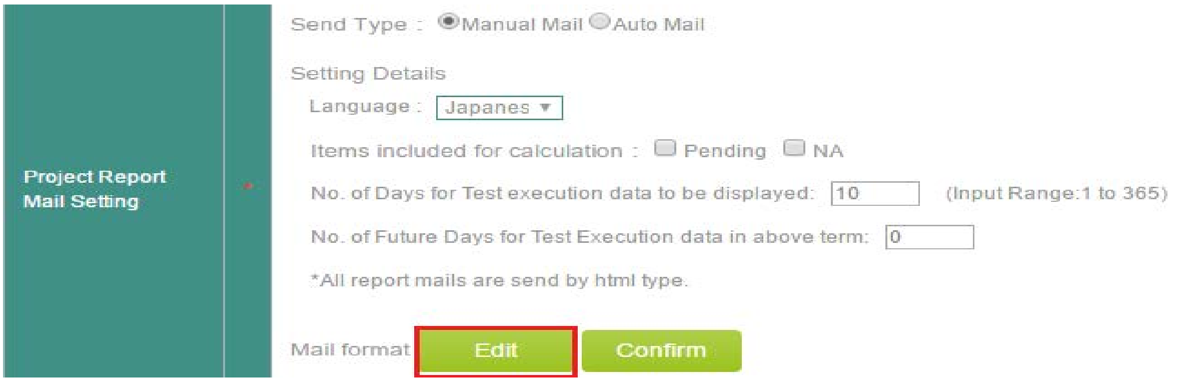
Item	Description
Service Name	Select from the service list.
Project Name	Enter the project name.
Project Key	Enter the project identifier which uses issue ID prefix and etc.
Project Start~End day	Enter the start date and end date of the project.
Project Start~End time	Enter the start time and end time of the project.
Project Status	There is 4 possible project status as below: ● In Progress ● Observation ● Risk ● End ※ Please make the project status “End” after the completion, and the project will be archived soon.
Process Name	Please select the current project to add a new process, every project requires at least 1 process. ※ The user can set up the version in the service setting. Please refer to "2.1.2. Setting a version" for more details.
Attachment	Enclose shared documents to the project. ※ Up to 10 MB × 10 items registration allowed.
Encoding	Select the encoding format for the test suite from Windows - 31J, UTF - 8 and Unicode.
Mail Setting	BTS mail Setting: A notification e-mail will be sent to other team members and the reporter after the new setting or issue registration. Setting the issue through email: A notification e-mail will be sent to other team members and the reporter after the new test or issue registration.
Project Report Mail Setting	The user can set up the report mailing related settings that the language setting is required for automatic sending. Customizing other mail formats is possible ※ Setting the team memebers mail addresses is possible by setting members’ project status mail check box on.

※ Customize the mail format.
The user can customize the report mailing content with following steps.

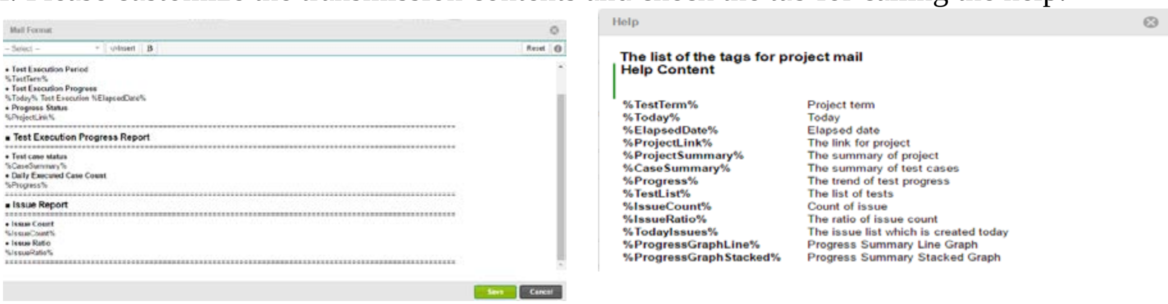
[An example of customized report mail]



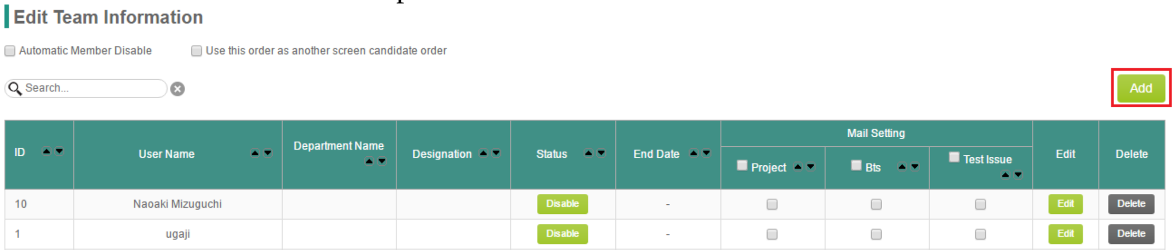
I. Press the “Edit” button to start the customization.



II. Please customize the transmission contents and check the tab for calling the help.

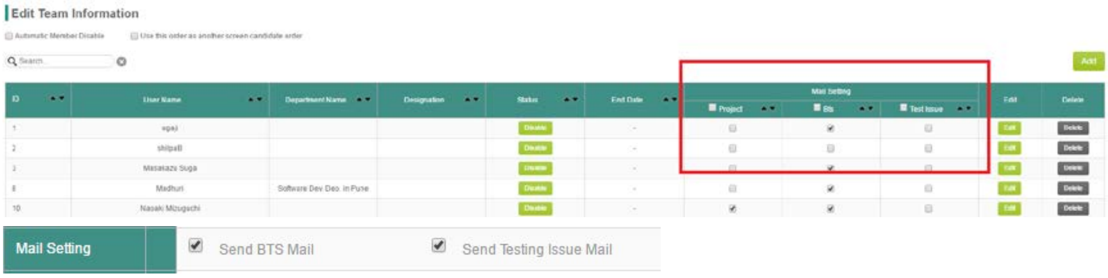


(4) Press the “Add” button to set up the team information.



(5) Select the member for the team and press the “Add”/“Delete” button to register/delete the team member. Press the “Close” button after the registration is completed.
※ The user searchable with parameters like department, rank and work location.

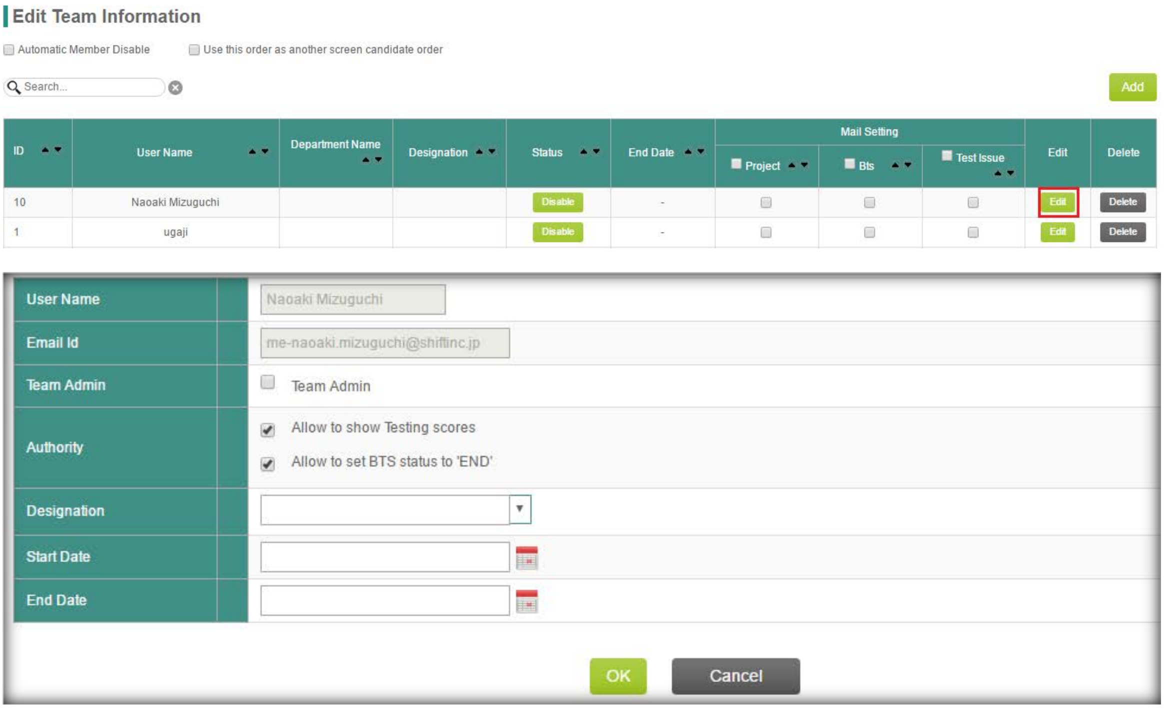
(6) Please set all mail check boxs on e-mail addresses that you’d like to send the notification to for each member’s e-mail setting.
※ Set project basic information setting’s mail notification check box on to enable the mail notifying or the mail will not be sent if the setting is off.



(7) Press the “Edit” button for each member to process the individual setting.
※ Set the checkbox “Automatic Member Disable” on to automatically make all memebers status invalid after the end of the project day.

※ Pressing the “Disable” button is also the way to invalid the user. Please notice that the user without administration authentification is not allowed to view the project.

(8) Enter the value for each item and press “OK” button to keep settings.



Project	Description
Team Admin	Team administrators can set the following permissions for their project:
Authority	Viewing testing scores View testing results from the test perspective in the member tab on the analysis screen. End the BTS status. End the issue status.
Designation	Set up the role for the team member.
Start day	Enter the project start day.
End date	Enter the scheduled project end day.

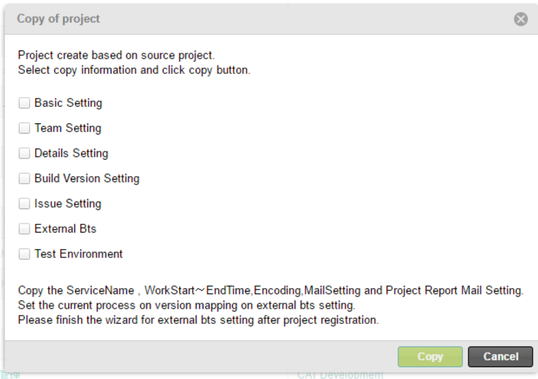
(9) Press the “Register” button to finish on the project registration screen.

5.1.2 Copy a Project

(1) Select “Project Management” from the drop-down menu shown by pressing the tool icon.

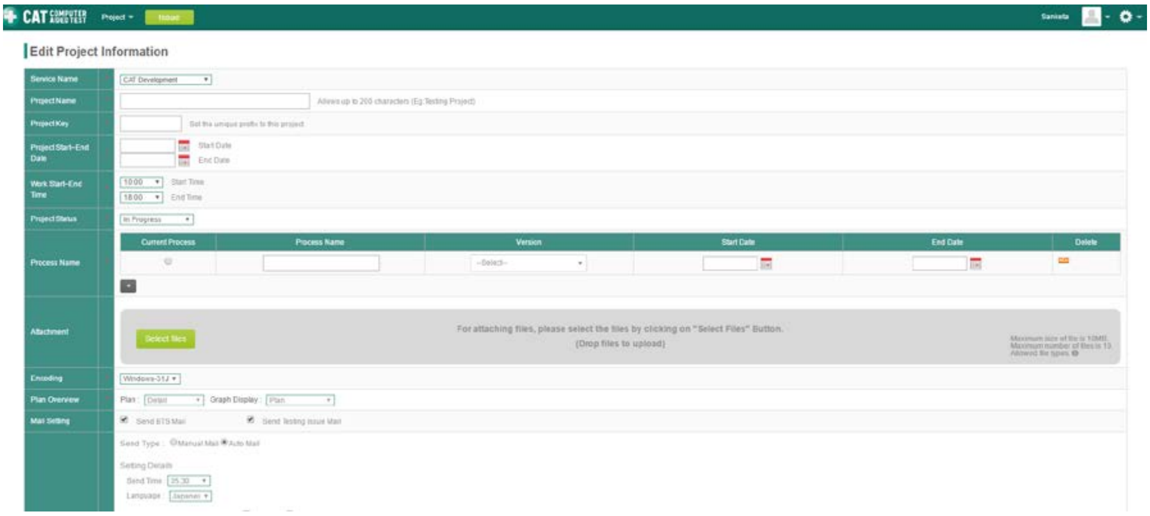
(2) Press the copy button of a project to copy the setting.

(3) Select those settings you’d like to copy and press the copy button.



Project	Description
Basic Setting	Copy the service name, work time, encoding, mail setting and project report setting.
Team Setting	Copy the project team settings.
Details Setting	Copy the project settings in details.
Build Version Setting	Copy the project build version setting.
Issue Setting	Copy the project issue setting.
Test Environment	Copy the project setting of the test environment.
External BTS Setting	Copy the Service Name, WorkStart ~ EndTime, Encoding, MailSetting and Project Report Mail Setting. Set the current process on version mapping on external BTS setting. Please finish the wizard for external BTS setting after project registration.

(4) The new project registration screen shows up after all selected settings are copied by pressing the copy button, in which the user can enter the required information and finish the registration. The external BTS wizard will pop up after copying the external BTS setting and please refer to “9. External BTS settings” for more details.



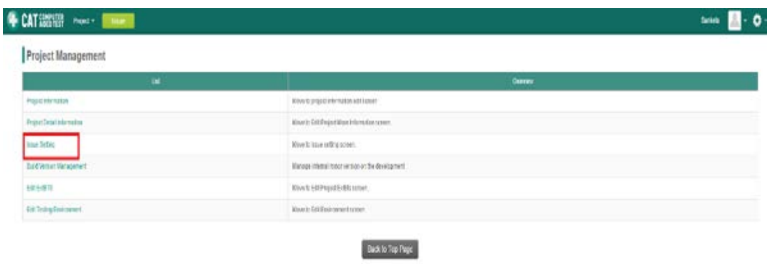
5.2 Issue Settings

This section illustrates the settings in the project.

(1) Select “Project Management” from the drop-down menu shown by pressing the tool icon.

(2) On the Project List screen, select the project to adjust settings.

(3) Click the issue setting in the menu on the project management screen.



Following settings are the same as the content in “2.2 Setting the issue template” in which contains the guide that the user can follow for setting the issue. The CSV import function will be illustrated in next section.

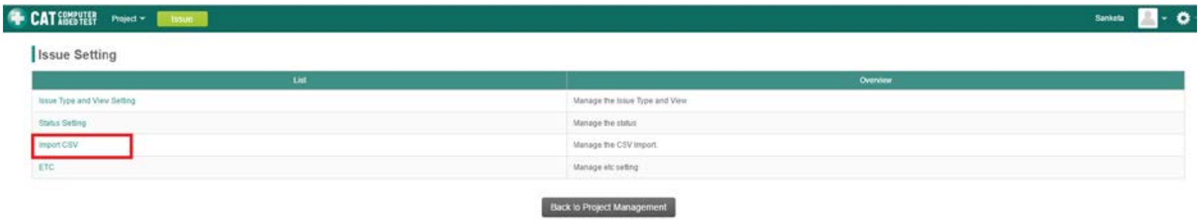
5.3 Import the Issue

This section illustrates the way to import the issue.

※ Issue importing can’t be executed when external BTS synchronous mode (Redmine/JIRA/Backlog) is active.

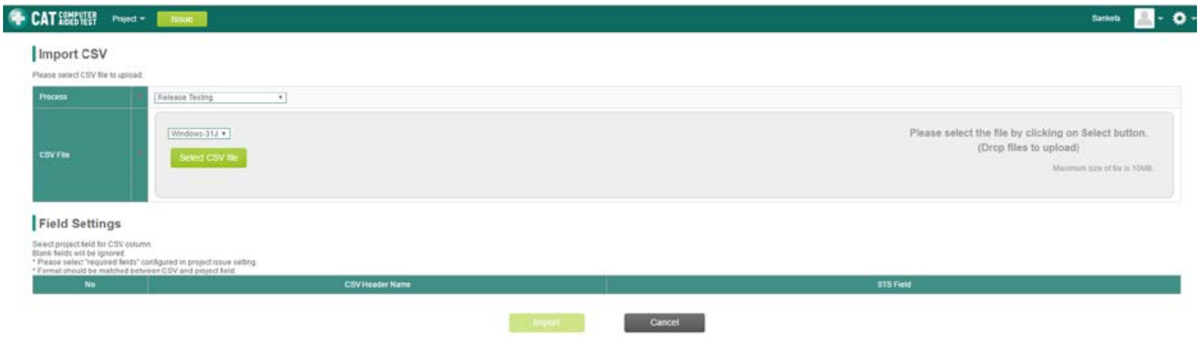
(1) Click the issue setting on the project management screen of the project you’d like to import.

(2) Click “Import CSV”.

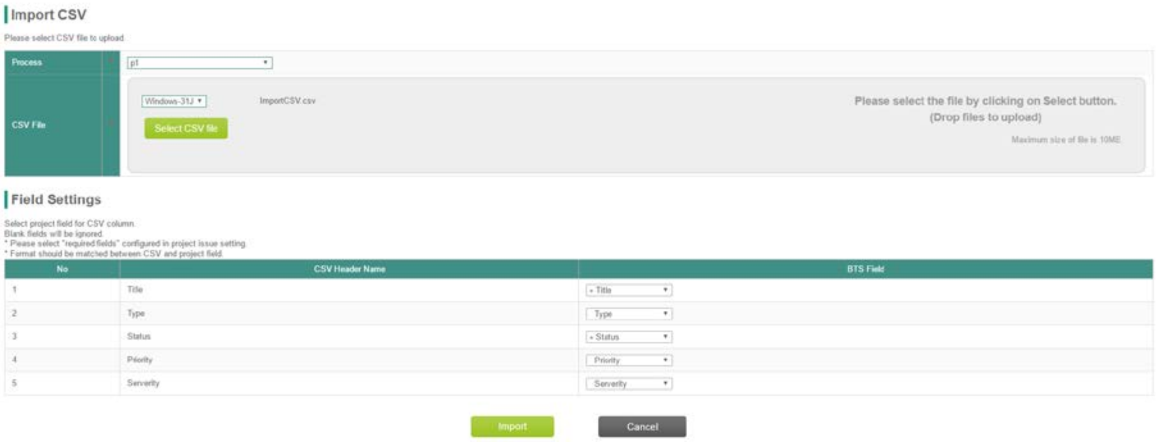


(3) Select a process and upload the CSV file.

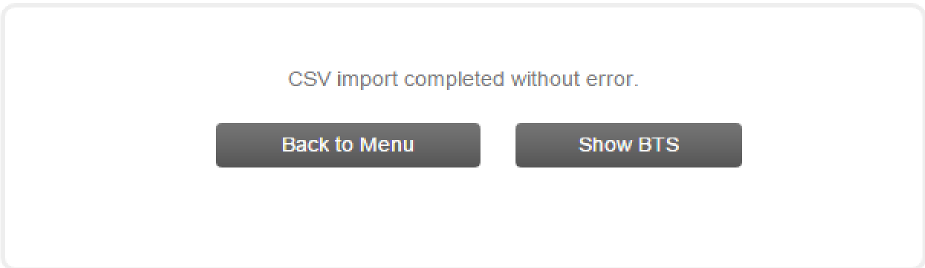
※ In the uploaded file, the first column is the item name and columns after the second column is for setting each item’s value. Please remember to keep item’s name in the CSV file the same as issue field’s name and refer to step 4 (next step) for automatic information matching.



(4) Correlate each uploaded item with the project field information.
Please press the import button when matching is done.
* Required items set in the project must be allocated.
* Field type choices and choices of uploaded items must match.



When CSV import is completed, the following screen will be displayed.



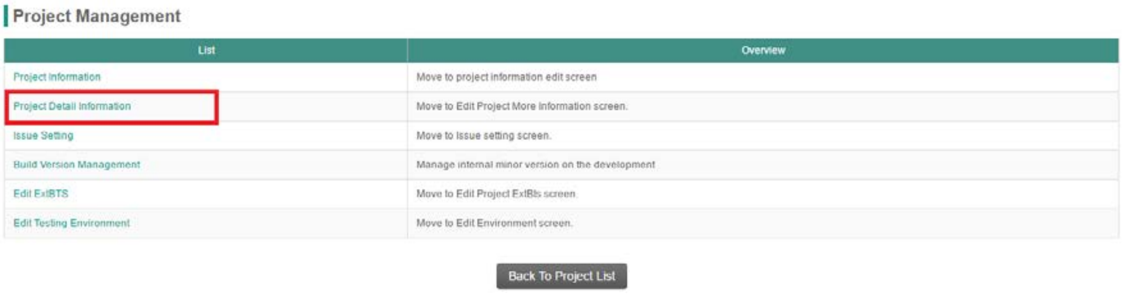
5.4 Enter the Information in Detail

The user can add information such as man-hours and estimations to the project.

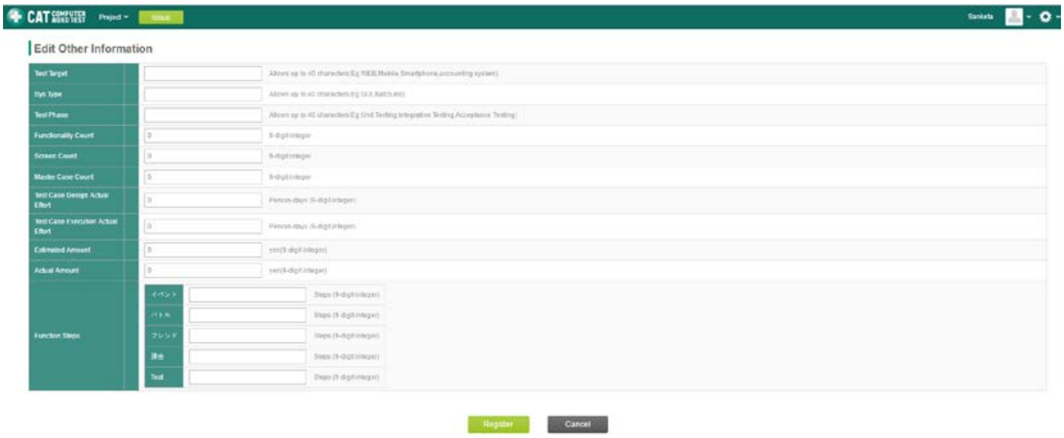
(1) Select "Project Management" from the drop-down menu shown by pressing the tool icon.

(2) On the Project List screen, select the project to adjust settings.

(3) Click “Project Detail Information” on the project management screen.



(4) Enter detailed information and press the register button.



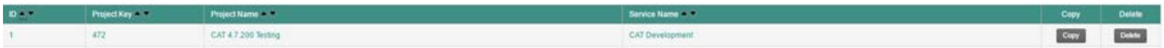
Project	Description
Test Target	Enter the test target.
System Type	Enter the system type.
Test Phase	Enter the test phase.
Functionality Count	Enter the number of functions.
Screen Count	Enter the number of screens.
Master Case Count	Enter the number of master cases.
Test Case Design Actual Effort	Enter the actual design man-hour.
Test Case Execution Actual Effort	Enter the actual man-hours spent.
Estimated Amount	Enter the estimated amount.
Actual Amount	Enter the actual amount of the cost.
Function Steps	Enter the number of function steps for each function. It is used for density calculation in test analysis.

5.5 Register the Test Environment

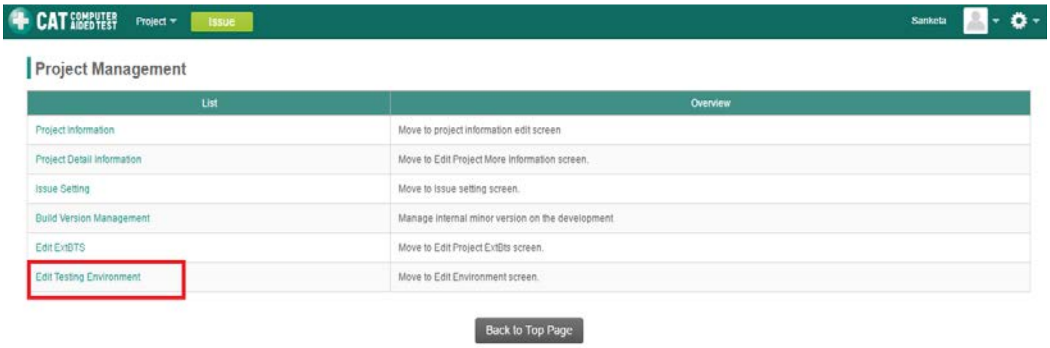
The user can register the test environment for each project which is connectable with test suite's execution result column for checking and analyzing the progress.

(1) Select "Project Management" from the drop-down menu shown by pressing the tool icon.

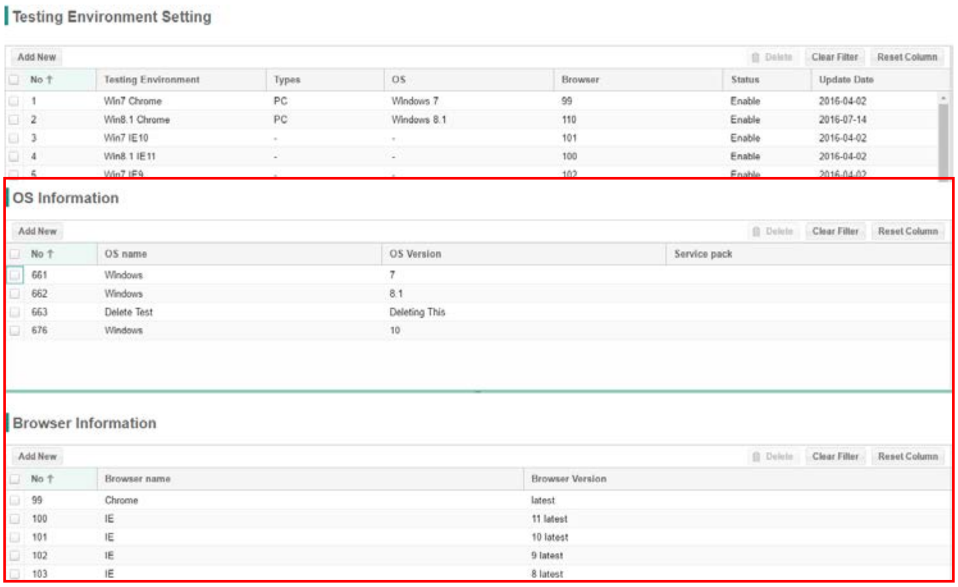
(2) On the Project List screen, select the project for configuring its BTS.



(3) Click "Edit Testing Environment" on the project management screen.

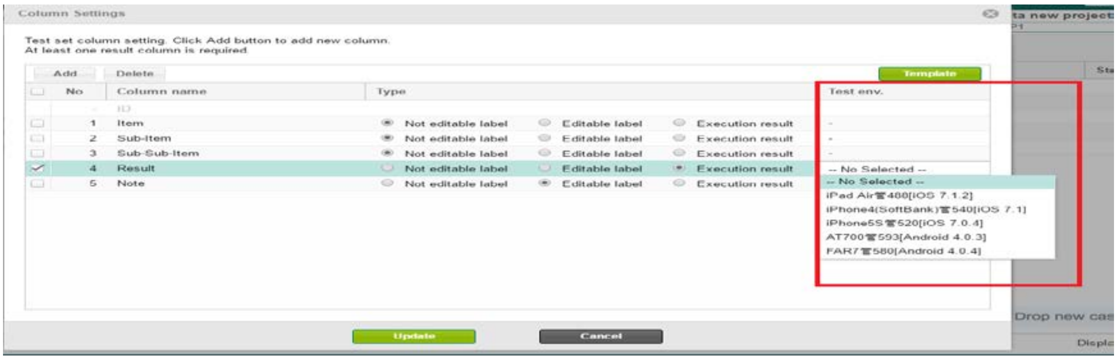


(4) Register OS and browser information at the bottom of the screen.



(5) The user can register OS and browser information on the testing environment setting screen and press the “register” button at the bottom of the screen to keep all current settings.

(6) The registered test environment is connectable to the execution result column when registering the test suite. For registering test suites, please refer to "2.1 Register the test suite" in "6. Test design".



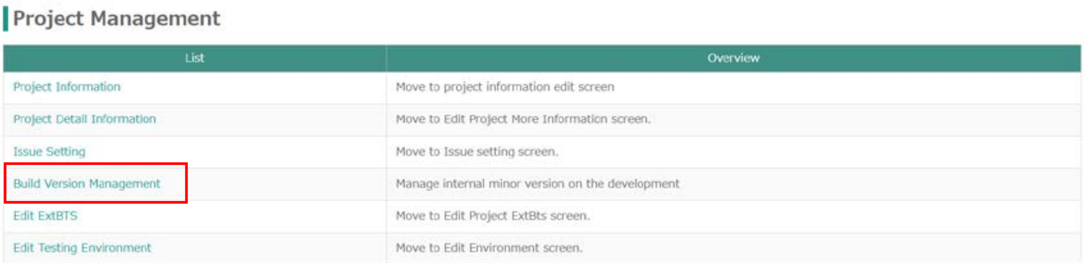
(7) The test environment setting is also connectable to the environment setting when registering an issue.

5.6 Build Versions Management

5.6.1 Register a Build Version

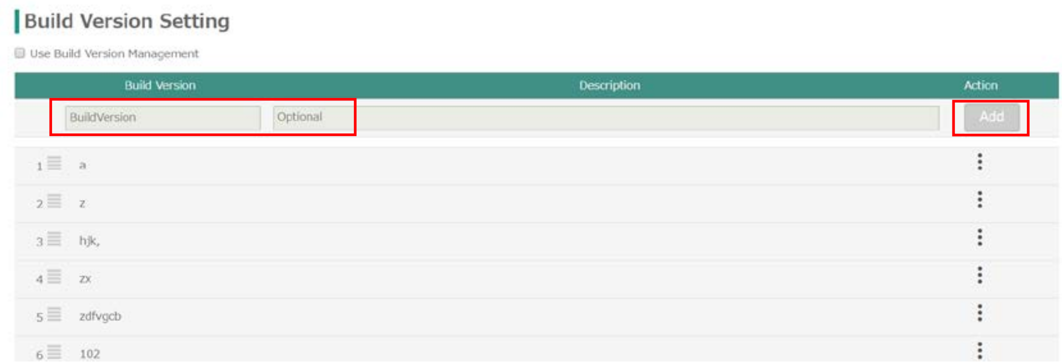
The build version, which’s registration is required for the utilization in each project and can be processed with following steps.

(1) Please finish settings in the following screen.
[Screen: Project Management > Build Version Management]



(2) Set the checkbox of "Use Build Version Management" on.

(3) Press the "Add" button on the right side column after entering the build version.

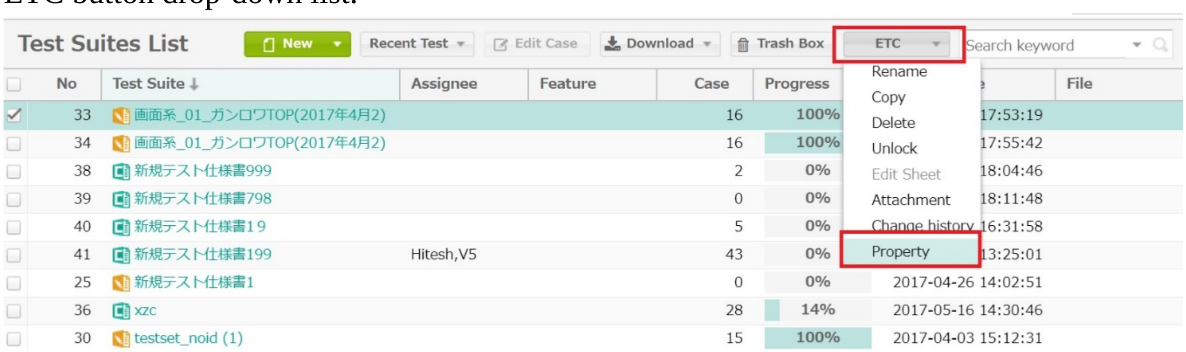


(4) Press the "OK" button on the lower screen to finish the registration.

5.6.2 Set up a Build Version to a Test Suite

Please set up the build version in the test suite (refer to following steps) for using it when executing the test.

(1) Test Management screen > Test Suites List, select the test suite and click the property in the ETC button drop-down list.



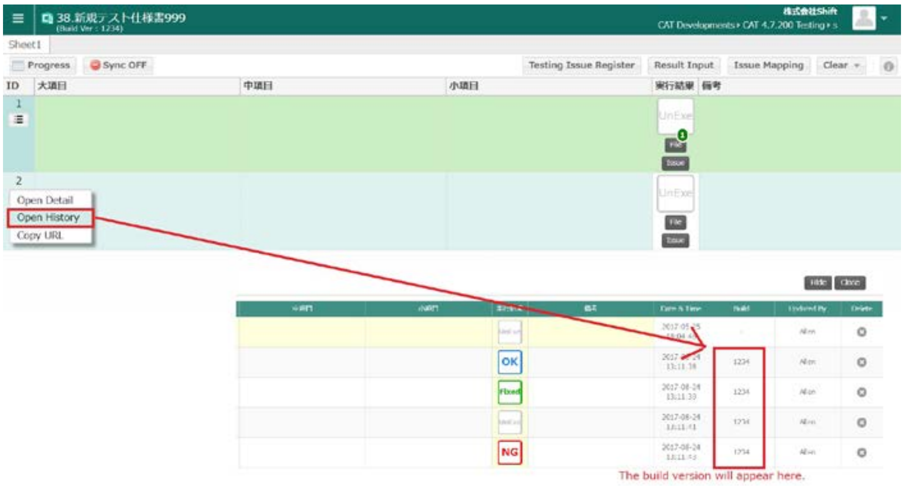
(2) Select the build version on the project screen.

(3) Press the “update” button to finish the setting.

(4) The build version will appear in under the title of the test suite on the test execution screen.

The result registration will be connected with the build version, which is checkable in the “Open History”

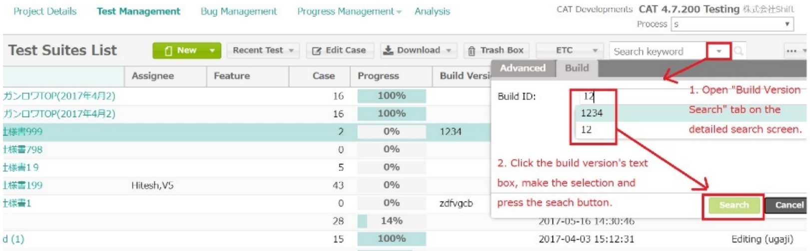
[Open History of the test execution result]
Screen: Test execution screen > Each case’s menu > Open History



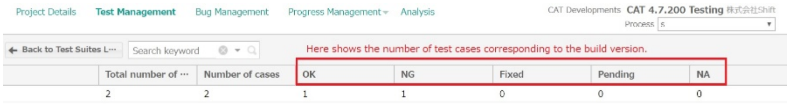
5.6.3 Filter or Search Results of Utilizing the Build Version

The build versions of the test suite are utilizable in following occasions:

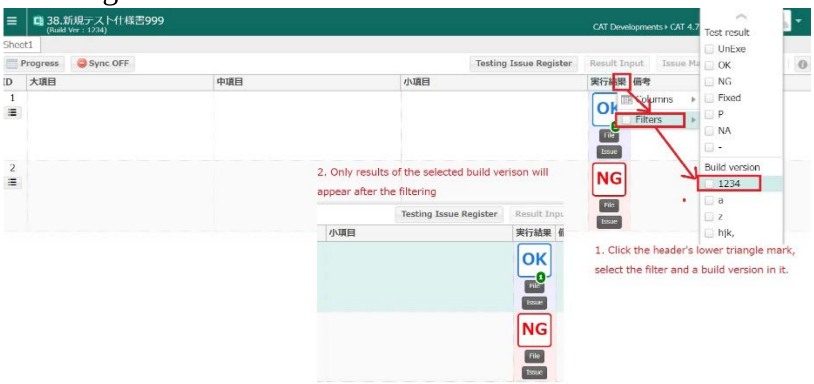
(1) Test results with specific build version are searchable by searching the build version as the key words from the test management screen when executing the test.



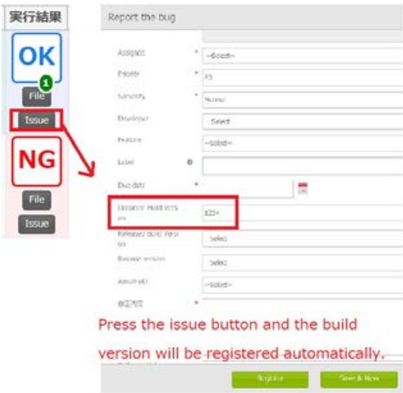
[The build version’s search result will appear after pressing the search “button”]



(2) Connect the build version with the test execution result on the test execution screen. Then registered results of various kinds of build version are searched to be shown.



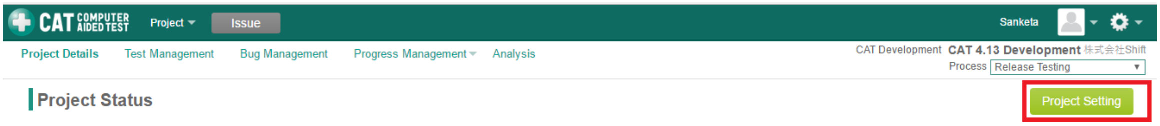
(3) Register the build version to the issue reported on the test execution screen.
Issue item has contained a build version.
Build version will be registered when reporting an issue.



5.7 Edit the Project

The project is editable after its launch.

(1) Display the project summary screen.
(2) Press the project setting button at the top of the screen.



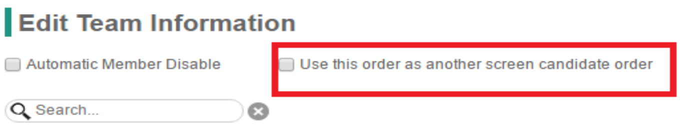
(3) The project information setting will be presented.

5.7.1 Unify the Display Order of the Members List in the Project

The display order of the project status's team list and member list on the issue registration screen are adjustable after following steps.

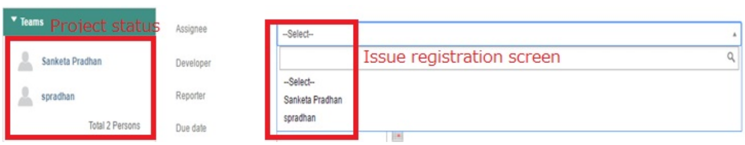
(1) Open the project information setting screen in the project management.

(2) Set the checkbox of "Use this order as another screen candidate order" on in edit team information section. Therefore, the following member list order will be applied to other screen's member list (like the member list on the issue registration screen).



(3) The order of the member list can be adjusted by drag-and-drop.

(4) Confirm the member list after setting the list order and pressing the register button at the bottom of the page.



Chapter 6: Test Plan and Execution Management

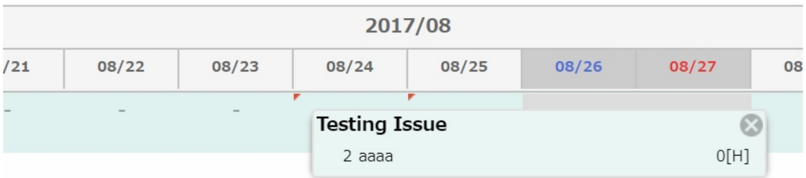
The user can enter the scheduled test cases and issue to manage the overall test project. The scheduled unit can be based on either the test suite or the process, which will be used to manage the scheduled number in the project. Scheduled issue number can be set up for each process also.
Section 6.1 is for the scheduled and actual records management of the test suite, 6.2 for the process and 6.4 for the issue management.

6.1 Enter the Scheduled Test Plan for each Test Suite

Enter the scheduled number for each test suite on the progress management screen and do the scheduled and actual records management.

※ Users with customer authentification are not allowed to enter the scheduled number.

The upper-left side of execution control target's cell shows a red mark that is clickable for checking the testing issue when there are registered impact area and start time.

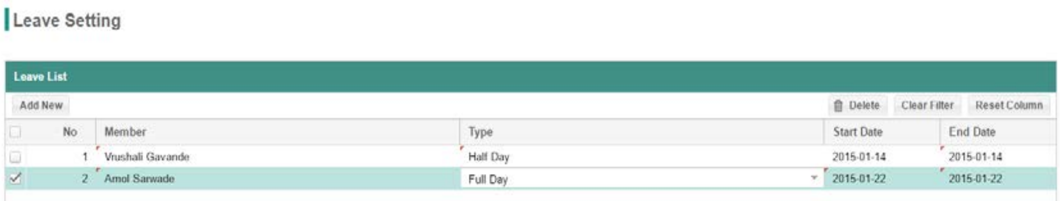


6.1.1 Enter Non-working Days for Members

The user can enter the non-working day manually in advance and those scheduled outside the non-working days automatically with following steps:

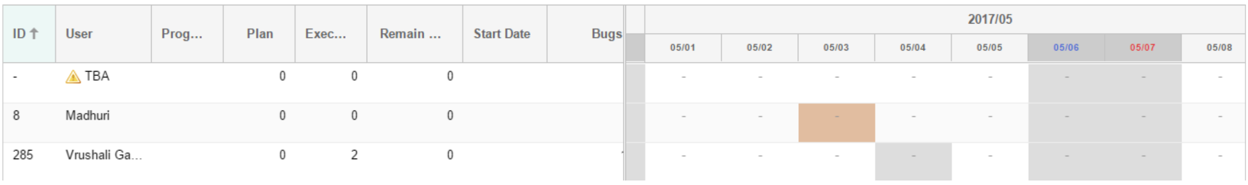
(1) Press the non-work day input button on the progress detail screen.

(2) Press the Add New button to create a new non-working day input line. Enter a non-working day and press the register button to finish.



Project	Description
Member	Select a member or all members to set the non-working day.
Type	Select the type of non-working day. It can be a full day off, half day or full working day.
Start Date	Select a start date for the non-working period.
End Date	Select an end date for the non-working period.

Non-working days will be reflected in the "Progress Detail"'s "Progress Member Detail" screen. The cell background is gray for the Holiday/Full Day Off and brown for Half Day.

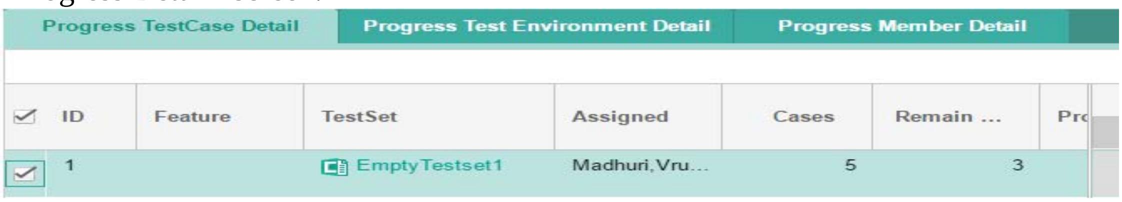


6.1.2 Download/Import the Test Plan

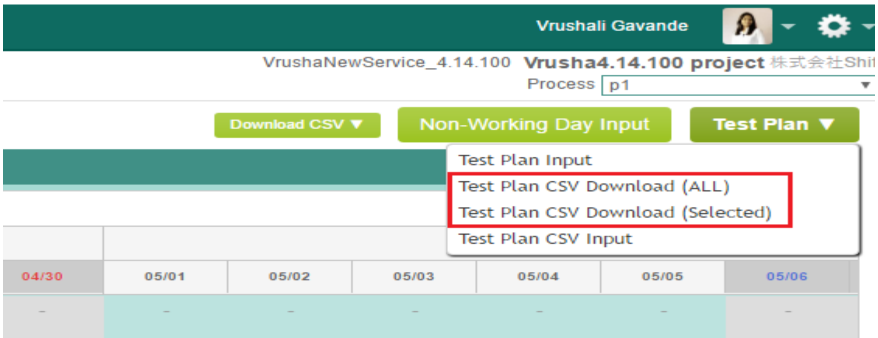
This section illustrates the method of CSV download and import scheduled to be tested. In addition to importing the CSV file, the test plan can be entered automatically or manually. For details, please refer to "3.4.3. Auto Planning" and "3.4.4. Manual Test Plan".

(1) Download the CSV file of the scheduled test.

1. Select the test suite you want to download in the "Progress TestCase Detail" tab of "Progress Detail" screen.

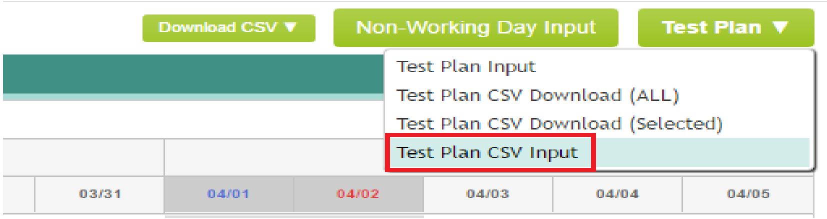


2. Open the dropdown list of the "Test Plan" button and click on the "Test Plan CSV Download" link. In addition, the user can download Test Plan CSV for "ALL" suites or for "Selected"suites.



(2) Test Plan CSV Input.

1. Select the test specification you want to download on the “Progress Test Case Detail” tab of “Progress Detail” screen. Open the dropdown list of the “Test Plan” button and click on the “Test Plan CSV Input” link.



2. Upload the CSV file either by selecting a test plan CSV file or by drag-and-drop. The CSV file must matche with the test plan CSV file format presented in the table below.

To edit and upload the downloaded Test Plan CSV, open the downloaded CSV file with Microsoft Excel and update the following items (items marked with *) and upload it.
* If you wish to assign more than one person to the same test suite, please copy the line with desired assignee names.

Test Plan CSV file format

Column Name	Type	Description
testset_id	Numerical value	It is test suite’s ID which can be confirmed in the “No” column on the "Test Management" list screen.
testset_name	Text column	It is the name of the test suite, which is not required since it will be imported automatically based on the testset_id.
cases	Numerical value	It is the number of test cases which is not required since it will be imported automatically based on the testset_id.
priority	Numerical value	It is the priority of the test suite that ranges from 1 to 50.
speed	Numerical value	The time required for executing one test case (minute unit).
*user	Text column	The in charge of the test suite that recorded in CAT. The user will be recorded as TBA (to be assigned) if there is no in charge at this moment.
start_date	Date YYYY/MM/DD	It is the test start date for Test Plan which will be the process’s start day if it’s in a blank.
end_date	Date YYYY/MM/DD	It is the test end date for Test Plan which will be the process’s end day if it’s in a blank.
* To date	Numerical value	It is the planned number of days.

6.1.3 Enter the Test Plan Automatically

Steps for automatic test planning are as below:

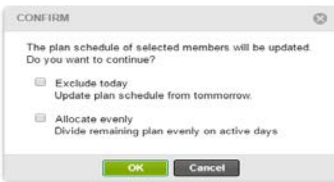
(1) Select at least 1 test suite in the progress TestCase Detail on the progress management screen and press the "test plan" button.

(2) Enter following required items after the test suite's scheduled input screen appears.

Parameter	Description
Assignee	Assign a person in charge to the test specification. It is necessary to assign at least one person in charge to the test specification.
Priority	The priority of each test specification is set up to 30. 30 (high priority) to 1 (low priority).
Speed	Enter the time required to execute one case of each test specification.
Start date/End date	Set the Start Date and End Date of each test specification.

(3) Select the test specification for automatic input and press the "Auto Planning" button. The schedule number will be entered automatically on a fixed schedule. Finally, click on "Save" button and Click on "Done" button to finish.

The following confirmation items are displayed by Auto Planning.

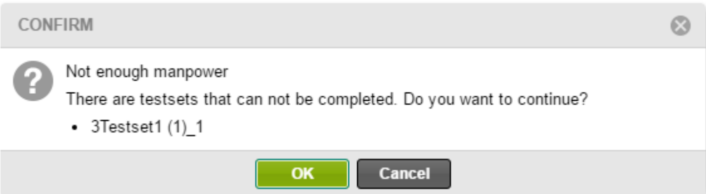


Items are as below.

Parameter	Description
Exclude today	Please enter the schedule from tomorrow (except Saturdays and Sundays) without including today as the input target.
Allocate evenly	Allocate the remaining cases evenly to the active days, which becomes effective when the rest active days are not enough corresponding to the rest is required work hours.

Please refer to "3.4.4. Enter the scheduled test cases manually” if you’d like to fine-tune the schedule.

※ 1. The initial value of the working hours per day is settable in the project’s work time setting.
※ 2. The following screen will show up if the work hours are not enough. Please press the ok button and assign the scheduled test cases for those not yet allocated and do the editing afterward.

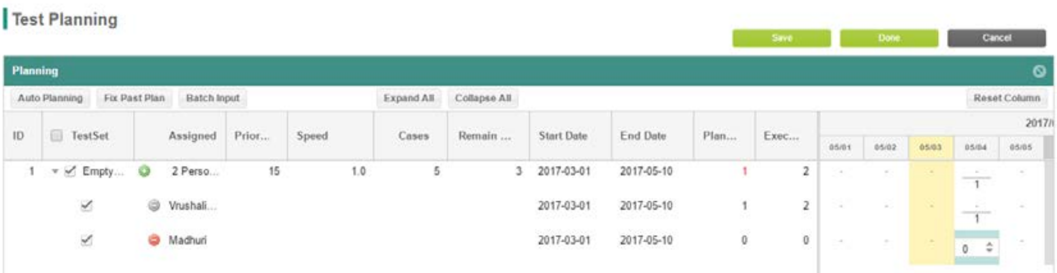


6.1.4 Enter the Test Plan Manually

Steps for manual test planning are as below.

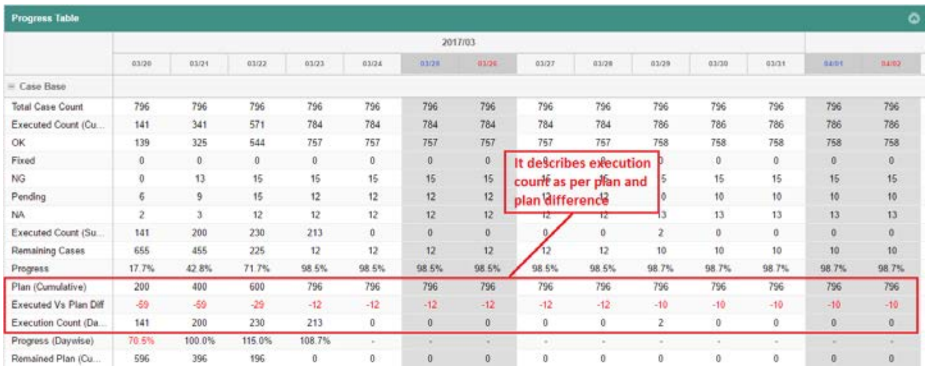
(1) Select the test suite you’d like to download with its check box on in the “Progress TestCase Detail” tab on the “Progress Detail” screen. Click “Test Plan Input” in the drop-down list shown by pressing the Test Plan button on the upper-right side.

(2) The user can enter the scheduled test cases number for the in charge by clicking the cell on the calendar on the right side. Press the save button to keep all current settings and done button to close the screen.



6.1.5 Check the Test Plan and Execution Records

The user can check the scheduled and actual records on the Progress Summary screen and Progress Detail screen. Please refer to "CAT User Manual -Basic-" for ways of table viewing.



	2017/03													
	03/20	03/21	03/22	03/23	03/24	03/25	03/26	03/27	03/28	03/29	03/30	03/31	04/01	04/02
Case Base														
Total Case Count	796	796	796	796	796	796	796	796	796	796	796	796	796	796
Executed Count (Cu...	141	341	571	784	784	784	784	784	784	786	786	786	786	786
OK	139	325	544	757	757	757	757	757	757	758	758	758	758	758
Fixed	0	0	0	0	0	0	0	0	0	[illegible]	0	0	0	0
NG	0	13	15	15	15	15	15	15	15	[illegible]	15	15	15	15
Pending	6	9	15	12	12	12	12	12	12	[illegible]	10	10	10	10
NA	2	3	12	12	12	12	12	12	12	13	13	13	13	13
Executed Count (Su...	141	200	230	213	0	0	0	0	0	2	0	0	0	0
Remaining Cases	655	455	225	12	12	12	12	12	12	10	10	10	10	10
Progress	17.7%	42.8%	71.7%	98.5%	98.5%	98.5%	98.5%	98.5%	98.5%	98.7%	98.7%	98.7%	98.7%	98.7%
Plan (Cumulative)	200	400	600	796	796	796	796	796	796	796	796	796	796	796
Executed Vs Plan Diff	-59	-59	-29	-12	-12	-12	-12	-12	-12	-10	-10	-10	-10	-10
Execution Count (Da...	141	200	230	213	0	0	0	0	0	2	0	0	0	0
Progress (Daywise)	70.5%	100.0%	115.0%	108.7%	-	-	-	-	-	-	-	-	-	-
Remained Plan (Cu...	596	396	196	0	0	0	0	0	0	0	0	0	0	0

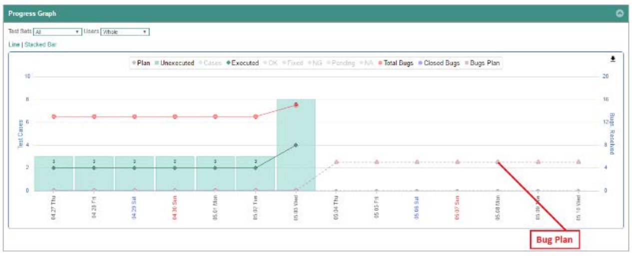
6.1.6 Check the Issue Occurence in the Test Plan

By forecasting the expected number of Issues/Bugs and registering them in advance, the planned number of Issues/Bugs will be displayed in the overall progress graph. The user can check the difference between the scheduled and actual failure records by the comparison.

(1) Press the bug in the drop-down list shown by pressing the “Plan Input” button” on the progress summary” screen.

(2) Enter the forecasted issue numbers for each day and press the save button to keep all current settings. Then press the done button or the cancel button to close the screen.

(3) Those inputted value will be presented as bugs plan in the progress graph.



6.2 Enter the Scheduled Test Plan for the Process

6.1 refers to test suite's scheduled and actual records management. Here are steps for entering the rough scheduled test case number and check the graph when the test cases are not designed and registered yet.

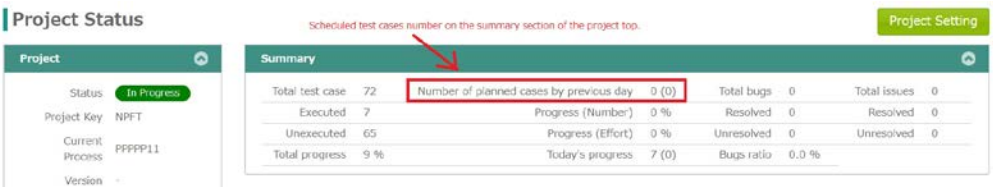
6.2.1 Change the Displayed Test Plan by Switching the Process

Switch the value displayed as the planned number of tests in the summary or graph in the project to the setting for each process.
The setting is done from the next screen.
[Screen: Project Management > Project Settings > Project Information]

The project's summary and the number of scheduled test cases will be updated after the input of the scheduled number to the summary and pressing the register button. Please check on each scheduled number of test cases for the test suite and confirm on the detailed progress screen.

Scheduled Value	Description
Summary	The entered project schedule in the progress summary and of the progress graph will nevertheless be presented. It's possible to enter any scheduled number in the scheduled summary. (Please refer to the following input method)
Detail	The entered project schedule in the progress detail and of the progress graph will nevertheless be presented. (As usual: Initial value) For details, there will be a limit for the test cases number.

[Project top's display location for the scheduled test cases]



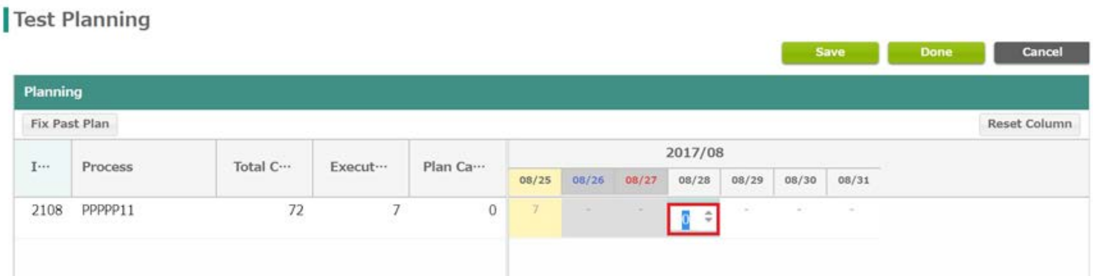
[Progress summary screen's display location for the scheduled test cases]

6.2.2 Enter the Scheduled Test Plan for each Process (Enter the Summary)

The number of cases to be digested per process is called "summary schedule" and can be entered from the summary progress screen.
Since the summary schedule can be registered even without the test suite, it is possible to set up a rough schedule (summary) based on the estimated test cases number and etc. at the project beginning.

(1) Progress Summary screen > Press the Plan Input button > Select “Test”

(2) Enter the scheduled test cases number for each day on the right progress calendar panel.



Moving to the right cell by pressing the tab key in the input mode.

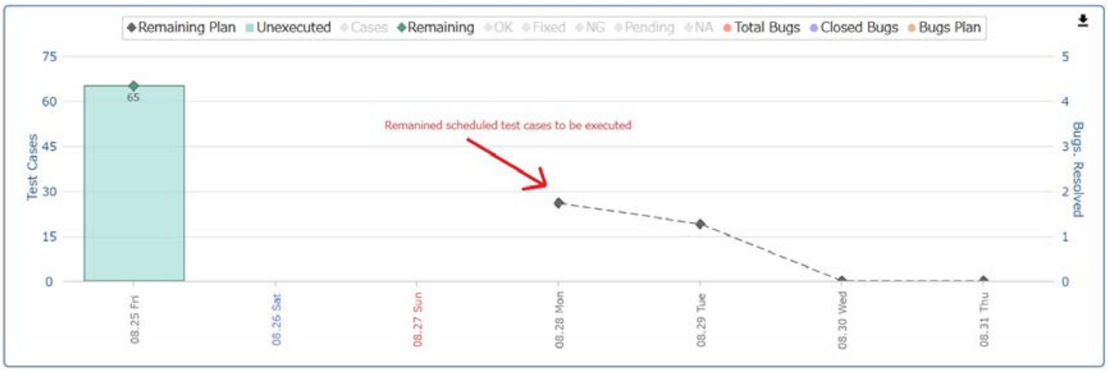
Reset the scheduled test cases number based on the actual records by pressing the “Fix Past Plan” button.

(3) Save the current settings and go back to the summary progress screen by pressing the “cancel” button. Please press the “save” button to keep the setting without jumping back to the summary progress screen and press the “cancel” button to end the editing without saving anything. Please refer to 6.2.1 for the scheduled test cases of the setting summary and summary progress for presenting.

6.3 Display the Remaining Test Cases against the Test Plan

By switching the scheduled test cases graph setting to the remained test cases, the scheduled test cases line will be displayed downward toward to the lower-right side.

[Accumulated scheduled test cases to be executed (default setting)]



[Accumulated test cases to be executed]

Go the next screen for the setting.
[Screen: On the top of the project status screen> Project Setting button > Project Information]

The scheduled test cases of the summary progress will be presented in the form of the remained test cases by setting graph display “Remaining Plan” and then the “register” button for it.

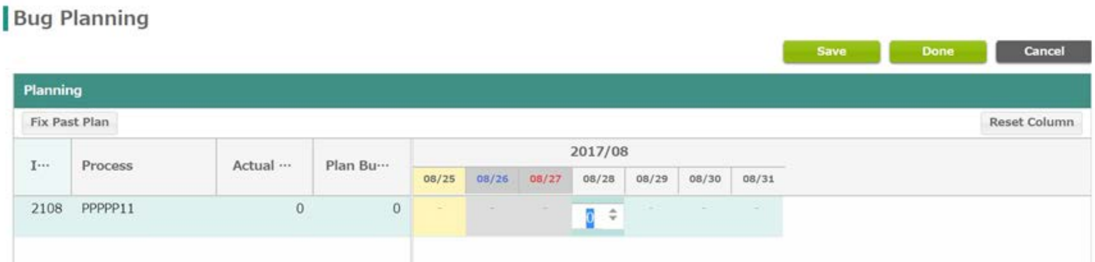
6.4 Issue Forecast and Actual Records Management

6.4.1 Check if the Issue happened as Forecasted

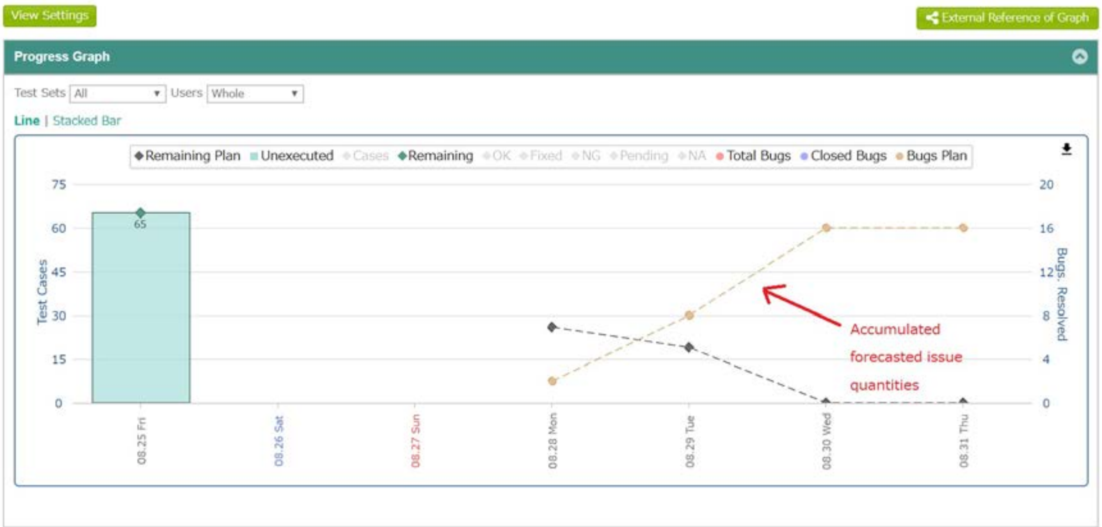
The progress summary graph shows the forecasted issue quantities registered in advance, in which the user can check the difference between the forecasted issue quantities by the comparion.

(1) Click “bug” in the list shown by pressing the Plan Input button on the progress summary screen.

(2) Enter the forecasted issue quantities for each day and press the save button to keep all current settings then press the cancel button to return to the previous screen.



(3) The inputted number will be presented as accumulated forecasted issue number in the graph.



Chapter 7: External BTS Integration

7.1 Working with the External BTS

CAT is able to connect with three kinds of external BTS.

(1) Synchronization mode (Redmine/JIRA/Backlog).

It is possible to synchronize the issue information between the project on the specified Redmine / JIRA / Backlog server and the CAT project, so does checking the issue on Redmine/JIRA/Backlog on CAT.

The issue in the external BTS will be automatically copied to the CAT when synchronizing, which wouldn't affect the project in the external BTS. All issue registrations will be redirected to the external BTS.

By connecting CAT with the external BTS:

- The function and the test suite name will be automatically imported to the external BTS.
- Connecting to the issue's test case
- It's possible to check the current issue situation by comparing the test progress.

※ 1. It is required to configure the firewall for accessing CAT if the external BTS was built in the Intranet.

※ 2. It is highly recommended to export all issues to CSV file since all issues have to be deleted before connecting to the external BTS.

(2) Copy mode (GitHub).

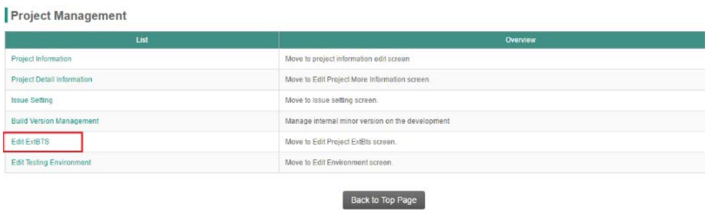
It is possible to copy issue information from CAT to GitHub Issue.

Following are ways to connect to the external BTS.

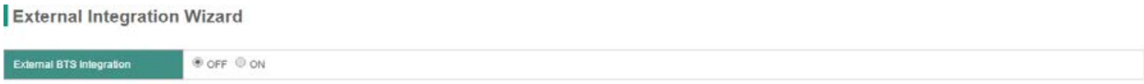
1. Prepare an external BTS account. The administrator account is required for connecting Redmine that synchronize the in charge and register. However, the administrator account is not required for synchronizing the issue information. An account with Browse Projects authority is required for connecting JIRA and an administrator account is necessary for connecting the Backlog.

2. Configure the external BTS that the user would like to connect via the Internet. Configure the firewall setting to connect to the external BTS established in the Intranet so that CAT can connect to it without errors.

3. Click "Edit ExtBTS" in project setting menu.



4. Set the “External BTS Integration” on and press the Next button.



5. Select synchronization mode to connect to Redmine/JIRA and copy mode to connect to GitHub. For steps to connect to the specific external BTS, please refer to “7.2 Working with Redmine”, “7.3 Working with JIRA”, “7.4 Working with Backlog” and “7.5 Working with GitHub Issue” for details.

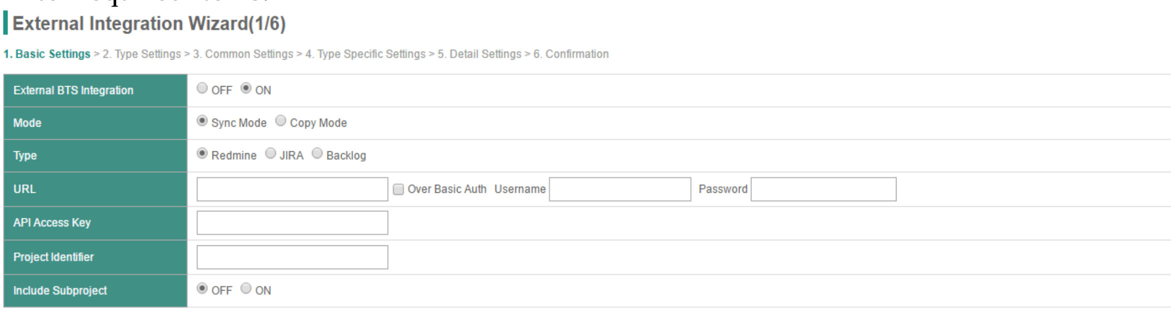
7.2 Working with Redmine

This section illustrates following ways to connect with Redmine.

- Setting the connection with Redmine
- Issue Registration
- Update the connection

Redmine Integration Settings

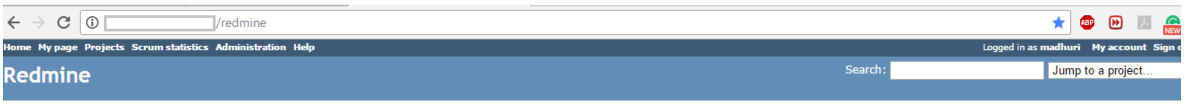
(1) Enter required items.



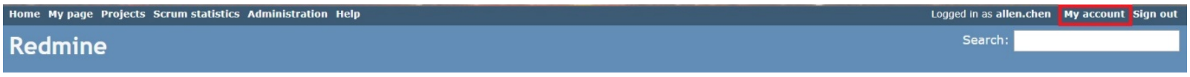
Item	Description
External BTS Integration	Switch on/off the External BTS Integration settings.
Mode	Select the synchronous mode.
Type	Select Redmine.
URL	Enter the Redmine URL with user authentication and all required for authentification if needed.
API Access Key	Enter Redmine's API access key in which the user can check on the Redmine's personal setting screen.
Project Identifier	Enter the identifier of the Redmine project to be connected in which you can check on Redmine's project setting screen.
Include Subproject	Select the sub-project integration (※).

※ For connecting to the sub-projects, switching on the setting that shows the sub-project in the main project is required on Redmine side for connecting to the Redmine sub-projects.

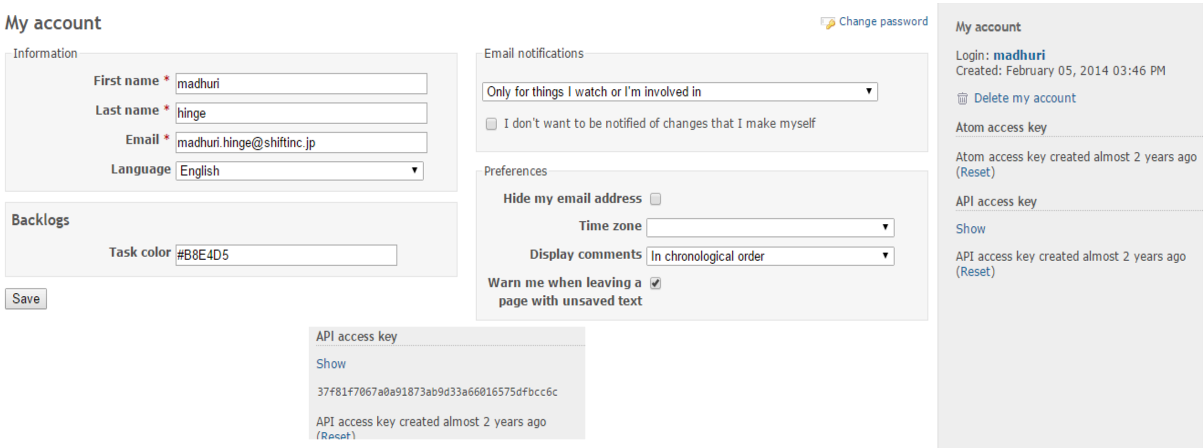
1. Enter the URL that shows up when you move the home page after the login.



2. Enter the API access key that you can find in “My Account”.



3. The API access key item will be displayed on the right side of the screen. Click “Show” to display the API access key.

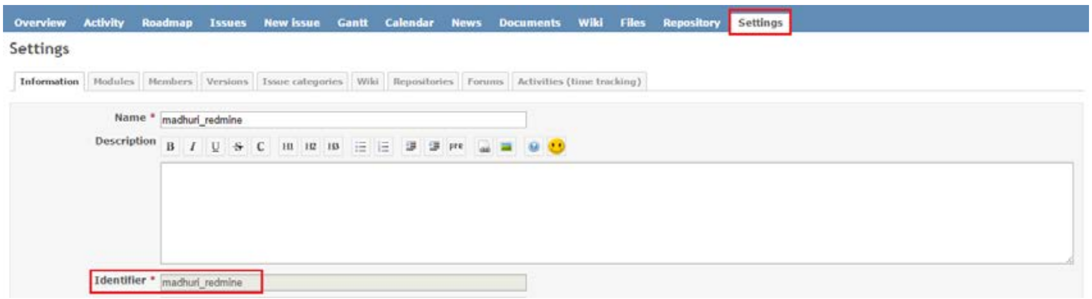


※ The user count of Redmine connection will be calculated individually by the tester user count since the API access key is issued for the specific user.

※ Set the checkbox of “Enable REST web service” on in Administration > Settings > Authentification screen if you can not see the displayed API access key.

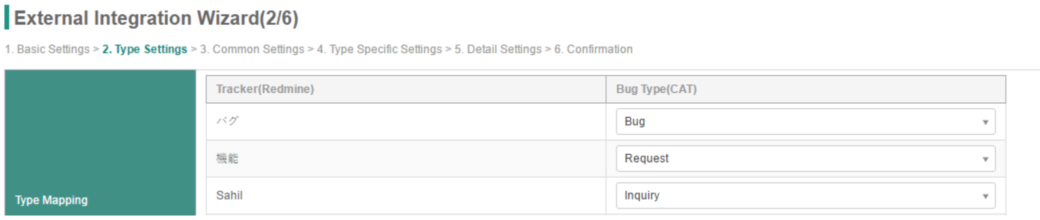
※ The API access key of the user with the authentification to view the ticket is required. The user information can also be connected with the system administration account.

4. Enter the Redmine project identifier of the project to be connected.



Enter values for those required items in (1).

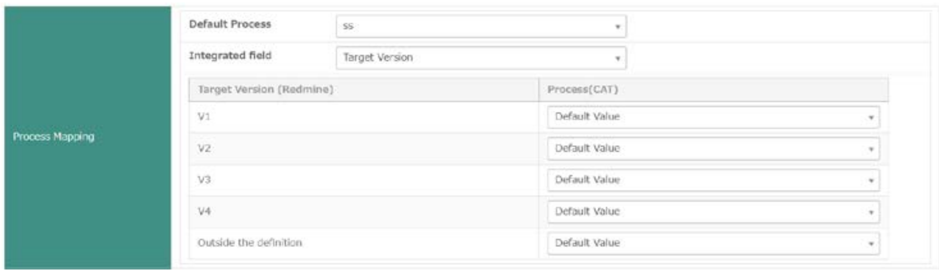
(2) Set up the scope of the type settings and tickets to be imported.
Please select the classification that corresponding to the Redmine tracker for the issue type mapping and notice that those tracker tickets will not be synchronized with such a selection without the connection.
The customized query will be set up when synchronizing the tickets with CAT, which will not synchronize with tickets outside the definition. The customized query is utilizable by the user who created it with API access key.



※At least one mapping setting is required for the connection.

(3) Move to the common settings screen by pressing the next button. There are five item settings on the common settings screen: process mapping, status mapping, priority mapping, severity mapping and feature mapping. Please enter the values that corresponding to Redmine's settings in CAT.
Press the "Skip Remaining Settings" button to skip all settings after the next page and jump to the confirmation screen. This is the function the user can make most of when doing the project reset with the settings inherited from the previous one.
Also, if the CAT project does not use priority or importance, those mappings will be hidden.

1. We will map CAT process with Redmine fields. First, select those fields to be connected. Following mapping screen will only be shown when Redmine's targeted version is connected.



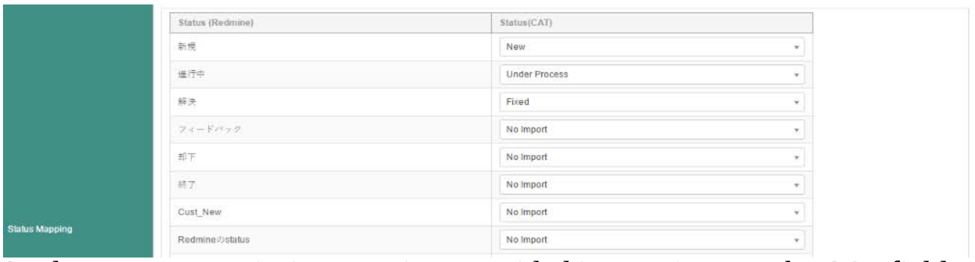
Select the CAT process that corresponds to the Redmine target version for the mapping.

Following settings can be utilized when there is no process assigned.
- Default process: Connect to the default process configurated here.
- No connection:

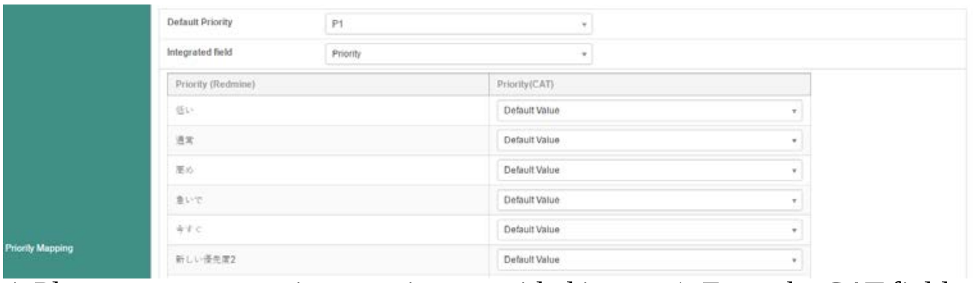
Related to Targeted Version [outside the definition].
This setting is for the version which is not listed, which can be applied to the new Redmine version which is not mapped on this screen.

※ The mapping screen will not be shown if the customized field is selected for a field. The customized field will be connected to the field if it shared the same name with a process in CAT, which will be connected to the default process if its name is not the same as any process.

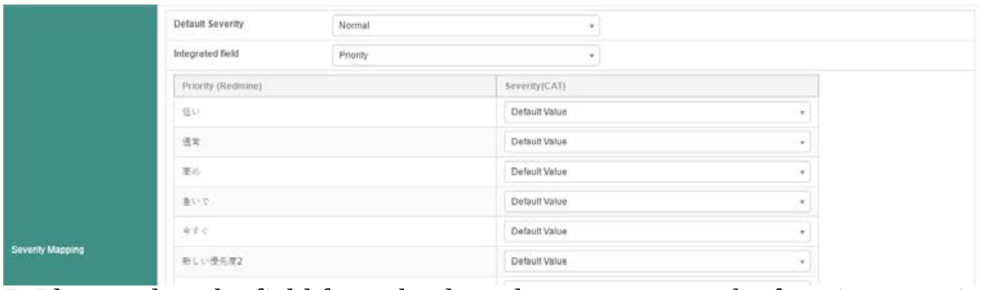
2. Please select the CAT status that corresponds to Redmine's for status mapping.
These status tickets will not be synchronized if none of them was selected.



3. Please execute priority mapping as guided in step 1. Enter the CAT field value that corresponds to Redmine's to utilize Redmine's priority in CAT.
Those priority field not in use in the project will not be shown.



4. Please execute severity mapping as guided in step 1. Enter the CAT field value that corresponds to Redmine's to utilize Redmine's severity in CAT.
Those severity field not in use in the project will not be shown.



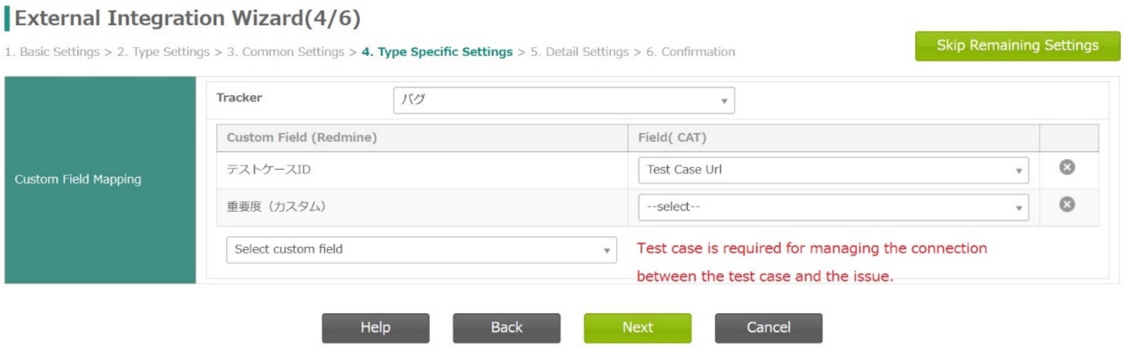
5. Please select the field from the drop-down to execute the function mapping.

(3) Common settings would be finished with above steps.

(4) Set up the corresponding CAT field by selecting the Redmine's customized field from the field list after setting the Redmine tracker to execute the Type Specific Settings.

For the occasion that there is the test case linked to an issue (the function that connects an issue to the test cases), please set up the customnized field (text type) in Redmine and connect it to the test case.
The case id will be recorded automatically when the issue is registered from the test exection screen and the test case quantities that connect to the issue can be confirmed.

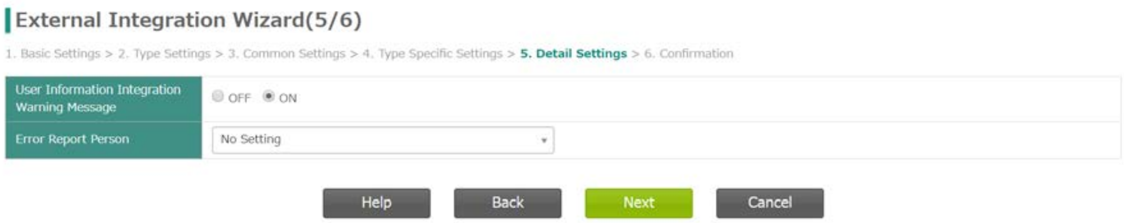
※ The infotmation here is for mapping Redmine's customized filed type with CAT's field type.



Please refer to 7.2.1 Redmine Fields Configuration for items in detail.

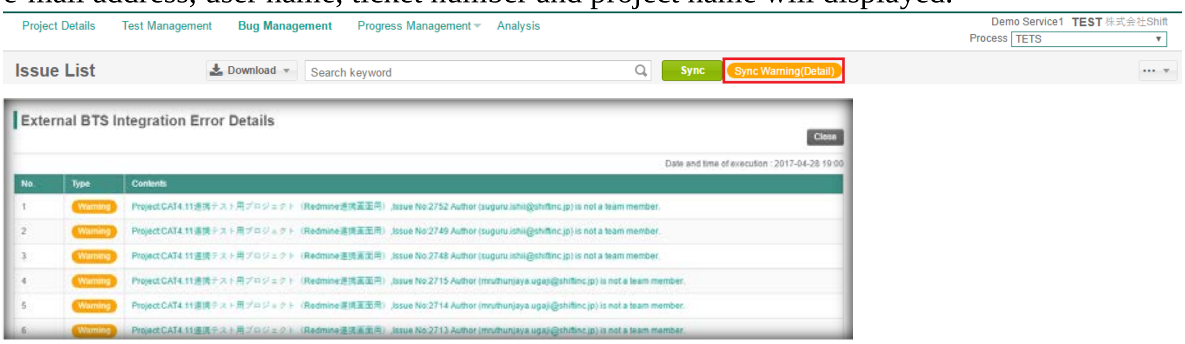
※ There must be at least registered ticket in Redmine so that the user can select customized field which will not be displayed if there is no registered ticket. The dummy ticket is required if there is no registered ticket in Redmine.

(5) Detail Settings settings in detail that contains following two items.



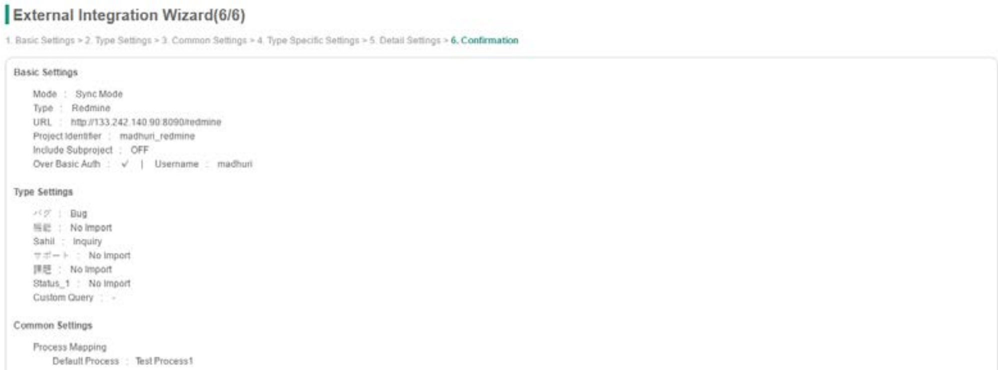
[User Information Integration Warning Message]
It's possible to connect in charge and the developer with the mail address as the key when the system administrator and Redmine is in connection.
The warning will not be issued if this setting is off and this setting can not be adjusted if it is connected with the user without administrator authentification.

User connection warning can be checked on the External BTS Integration Error Details screen shown by pressing the "Sync Warning (Detail)" button on the top of the issue list screen. When there is no e-mail address for the user who is the issue register or in charge in CAT, the original e-mail address, user name, ticket number and project name will displayed.

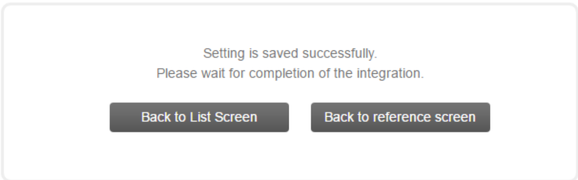


[Error Reports Person]
It’s possible to assign a person to be informed of the error report when the error occurs.

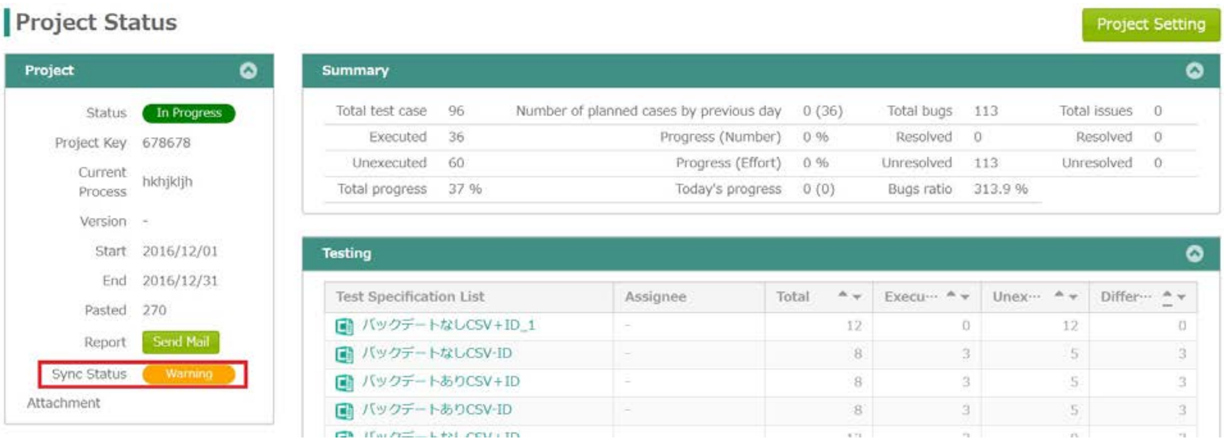
(6) Confirm current settings press the register button if everything is correct.



(7) Press the “Back to list screen” or the “Back to reference screen” button on the below popup to end the external BTS setting after the registration is done.

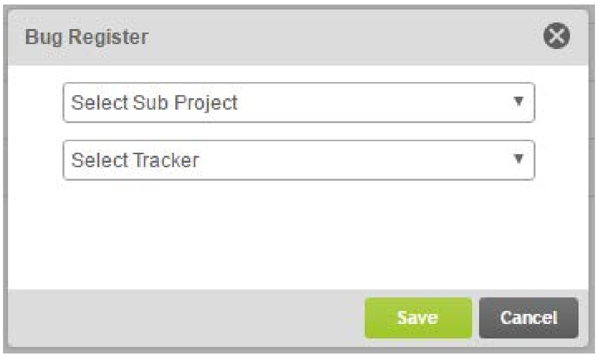


[Sync Status]
The sync status of the external BTS can be checked on the top of the project screen. The user can check the BTS integration information in detail by clicking the status button if there is any warning or error.

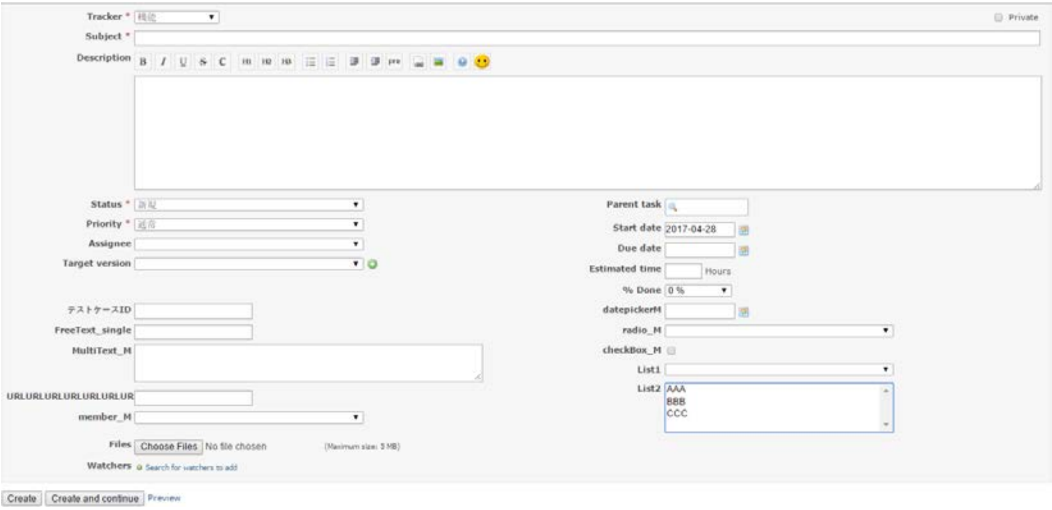


Bug Registration

(1) A popup as below will be displayed for the issue registration after the external BTS setting. Please select a Redmine sub project and the tracker to execute the issue registration.
※ There would be only tracker available for selecting if there is no sub project in connection.



(2) Please enter the value for each item to execute the issue registration on Redmine issue registration screen.

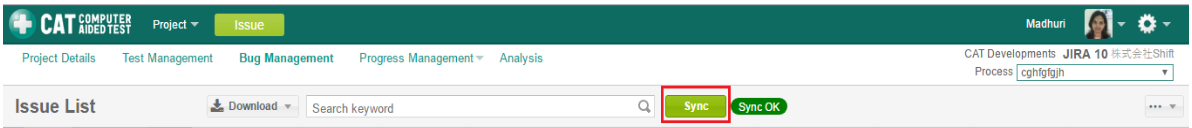


(3) Please press the create button after the inputting.

Update the Connection

The external BTS connection can be updated by pressing the “Sync” button.
Those problems happened when connecting will be displayed in Sync Warning (Detail), which can be shown by pressing the button so that the user can check the detail. The warning happens when there is no value that an issue is holding registered to CAT.

※ Those issues that exist only in CAT will be deleted after the connection updating. Please download all issues from CAT before connecting to the external BTS and upload them to the external BTS.



7.2.1 Redmine Fields Configuration

Following is the correspondence table that maps CAT’s field with the external BTS, in which you can refer to when mapping the customized fields. Besides, those customized fields which don’t exist in the BTS are not importable.

Redmine

CAT Item – Customized Filed	Type	Redmine Customized Field
Test Case	-	Text
Test Suite Title	-	Text
Test Case URL	-	Text
Customized Field	Text (one line)	Text
Customized Field	Text (more than one line)	Long Text, Text
Customized Field	Radio Button	Select from list, text
Customized Field	Check Box	Boolean Value
Customized Field	Multiple-Choice List	Select from list, text
Customized Field	Multiple-Choices List	Select from list (multiple choices), text
Customized Field	URL	Text
Customized Field	Label	-
Customized Field	Date	Date
Customized Field	Date + Time	-
Customized Field	Members	A User

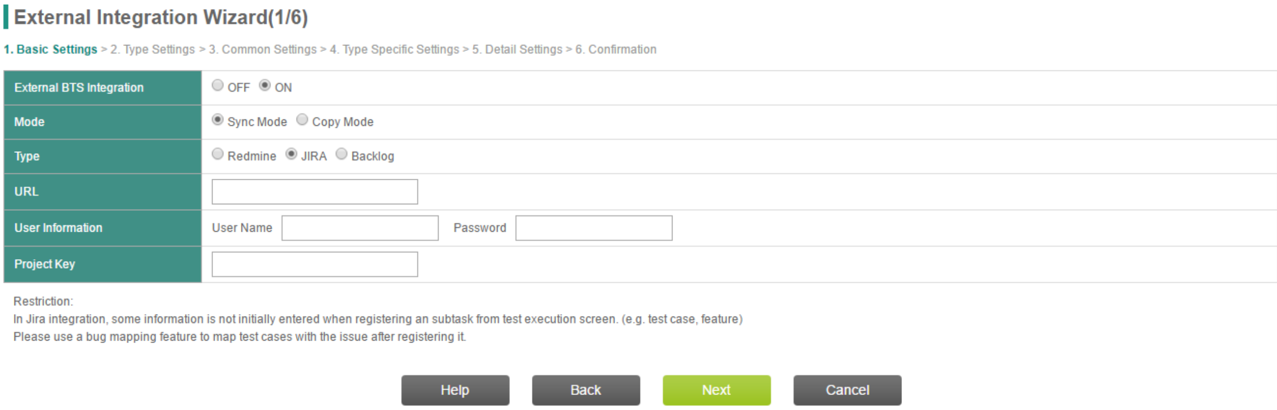
7.3 Working with JIRA

This section illustrates following ways to connect with JIRA.

- Setting the connection with JIRA
- Issue Registration
- Update the connection

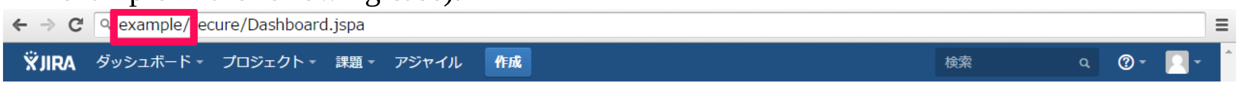
JIRA Integration setting

(1) Enter the required items.



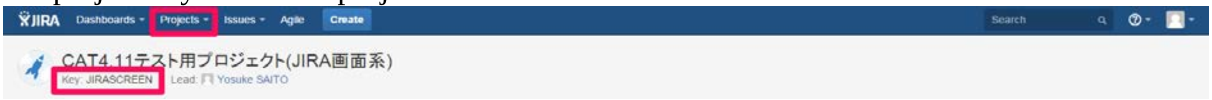
Item Name	Description
External BTS Integration	Switch on/off the External BTS Integration settings.
Mode	Select the synchronous mode.
Type	Select JIRA.
URL	Enter the URL that you can see on JIRA’s top page.
User Information	Please enter user name and password for connecting JIRA. The user account for the connection must have the authentification to view the project.
Project Key	Enter the JIRA project key for the connection, in which you can check on JIRA's project edit screen.

① Please enter the BTS URL that you can find on the top page as below (E.g. URL is http: // example in the following case).

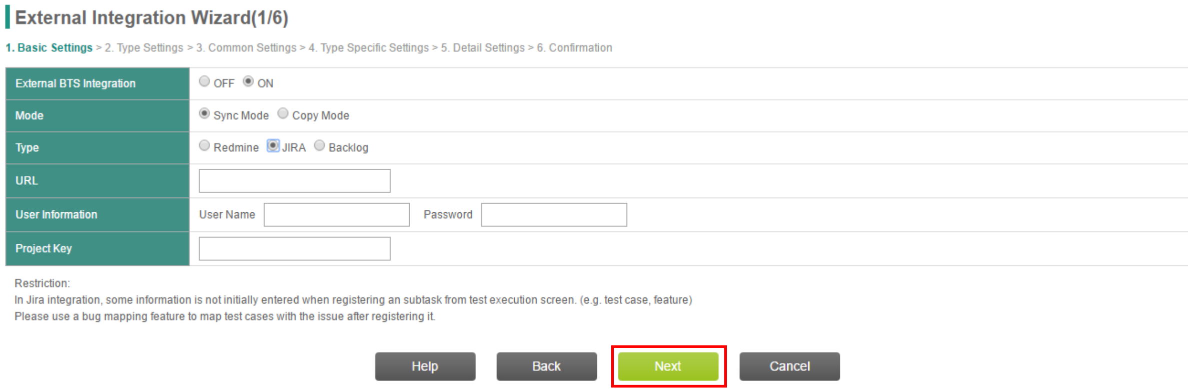


② Please enter JIRA user name and password and make sure the user account for connecting JIRA must have the authentification to view the project.

③ Please enter the project key of JIRA project to be linked with CAT project. You can check the project key on JIRA's project edit screen.



④ Press the next button after you finish the inputting.

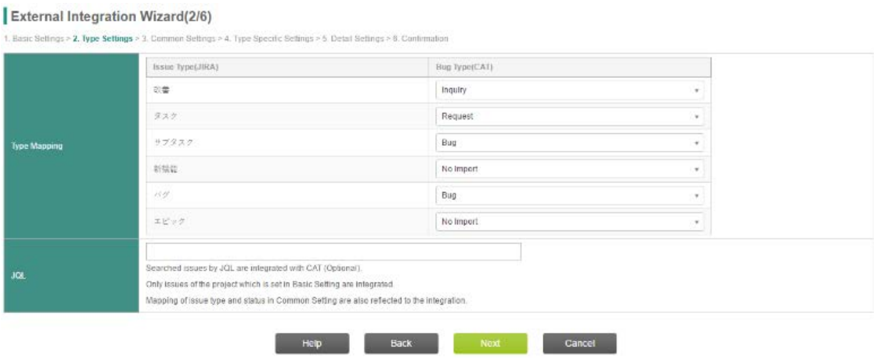


※ Please login to JIRA directly and try when you can't connect to JIRA and get CAPTCHA from it which caused by entering the wrong password for certain times.

Inputting of all required items can be finished with above steps in (1).

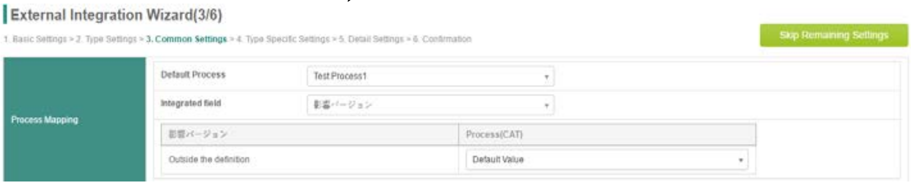
(2) Please select the CAT issue type that corresponds to the JIRA issue type from the drop-down menu for type settings.
Next, set up JQL (optional) in which can narrow down the scope of issues that synchronize with CAT. For example, you can specify conditions such as status = open and priority = urgent and assignee = jsmith. Please refer to the following URL for more JQL details.
Advanced Searching:
Https://confluence.atlassian.com/jira/advanced-searching-179442050.html

※At least one mapping setting is required for the connection.

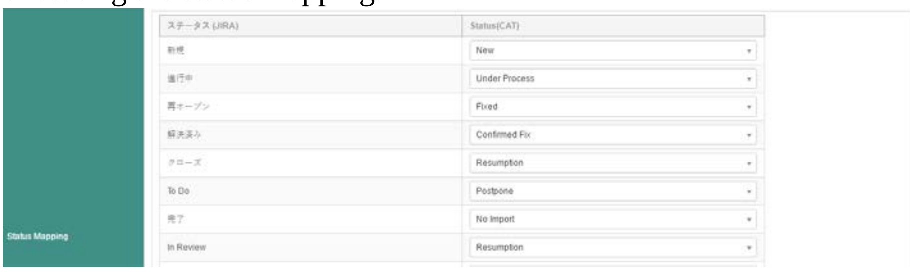


(3) Move to the common settings screen by pressing the next button. There are five item settings on the common settings screen: process mapping, status mapping, priority mapping, severity mapping and feature mapping. Please enter the values that corresponding to JIRA's settings in CAT or press "Skip Remaining Setting" to skip the rest and jump to the confirmation screen. If the priority or severity is not in user then its mapping table will not be shown as well.

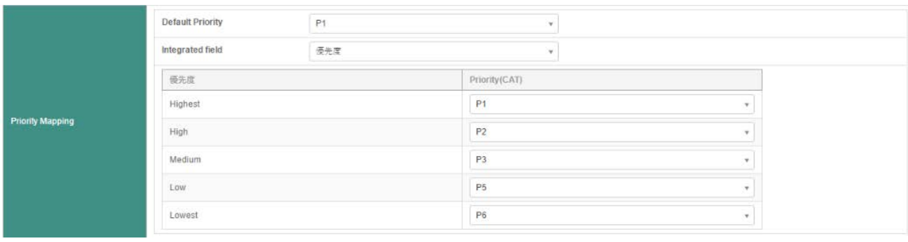
① Please select the CAT process that corresponds to the JIRA process for the mapping. The default process will be utilized when the process is not accessible or no related value when connected. Please select the version or customized field you'd like to connect to from the drop-down menu (The corresponding input will not be shown if you selected customized filed as the field to connect).



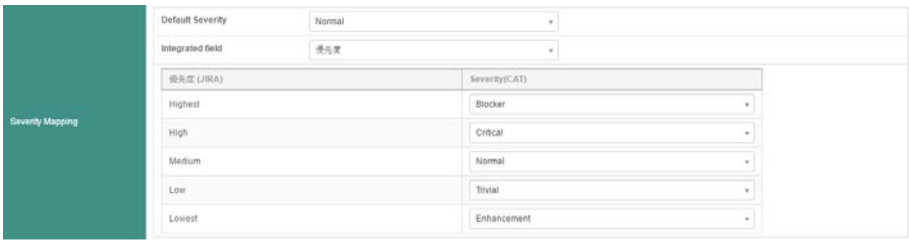
② Please select the status from the drop-down menu that corresponds to JIRA's status for executing the status mapping.



③ Please select the priority that corresponds to the JIRA's priority as the guidance in (1).



④ Please select the severity that corresponds to the JIRA's severity as the guidance in (1).

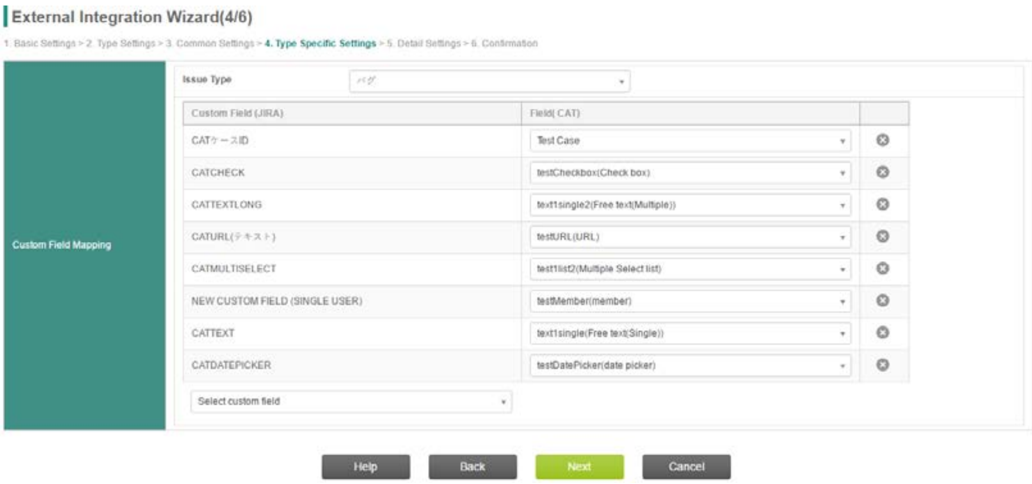


⑤ Please select the field to connect from the drop-down menu for executing the feature mapping and Label mapping.

Please refer to "12.2. Field correspondence of external BTS linkage" for more details about the mapping between fields.
Common settings can be finished with above steps.

(4) Please select the type and the CAT's field that corresponding to the JIRA's customized field for executing Type Specific Settings.
※ There should be at least 1 registered ticket in JIRA for selecting the customized field which shows nothing if there is not even an existing ticket in JIRA and the dummy ticket registration would be required for this occasion.

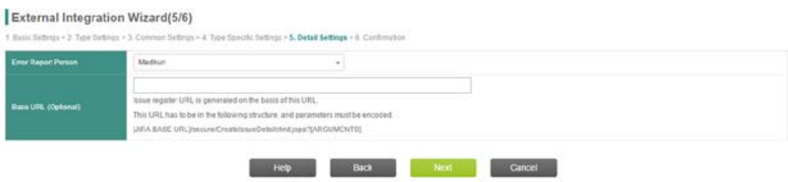
Besides, the guidance here is for mapping JIRA's customized field types with CAT's field types and the correspondence can be referred as below:



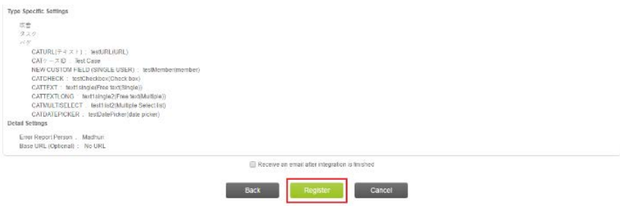
(5) Please select the e-mail address that error notification report of the connection error will send to for executing detail settings. Next, please enter any page URL which is configurable when registering an issue. By doing this, the initial value is importable with the template that can be corresponding to any issue field. Following is the format that the URL has to follow.
[JIRA BASE URL]/secure/CreateIssueDetails!init.jspa? [ARGUMENTS]

Please refer to the following table for basic guidance and below URL for more details.
Creating Issues via direct HTML links:
https://confluence.atlassian.com/display/JIRA051/Creating+Issues+via+direct+HTML+links

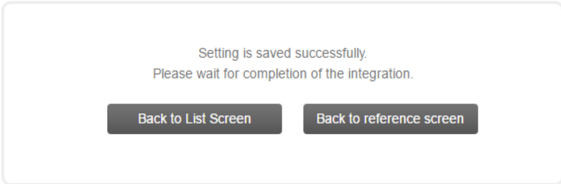
Item Name	Description
JIRA BASE URL	It is the basic JIRA URL for the connection.
ARGUMENTS	Please enter the field and value for the initial value input. Use & as the jointer that connects multiple fields together. Example: pid = 10420 & issuetype = 4



(6) Confirm current settings press the register button if everything is correct.

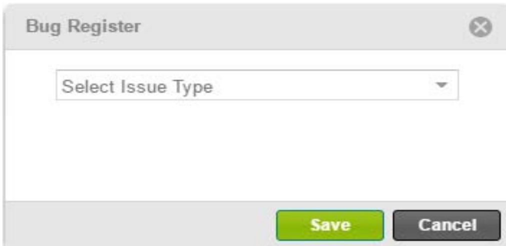


(7) Press the "Back to list screen" or the "Back to reference screen" button on the right popup to end the external BTS setting after the registration is done.

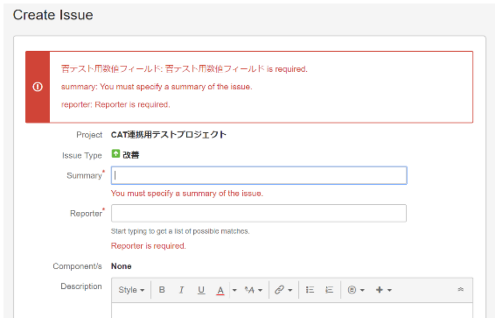


Bug Registration

(1) A popup as right one will be displayed for the issue registration after the external BTS setting.
Please select a mother issue the type selected is a sub task.
※ All default connection settings such as case ID or function is not configurable if issue registered is in JIRA's sub task.



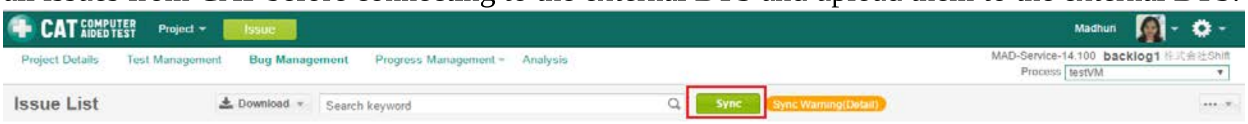
(2) The JIRA issue screen will be launched, please enter required items and press the "Create" button.



Update the Connection

The external BTS connection can be updated by pressing the "Sync" button.
Those problems happened when connecting will be displayed in Sync Warning (Detail), which can be shown by pressing the button so that the user can check the detail. The warning happens when there is no value that an issue is holding registered to CAT.

※ Those issues that exist only in CAT will be deleted after the connection updating. Please download all issues from CAT before connecting to the external BTS and upload them to the external BTS.



7.3.1 JIRA Fields Configuration

Following is the correspondence table that maps CAT's field with the external BTS, in which you can refer to when mapping the customized fields. Besides, those customized fields which don't exist in the BTS are not importable.

JIRA

CAT Item – Customized Field	Type	JIRA Field Type
Test case	-	Text Field (Single Line), Text Field (More than one Line)
Test Suite Title	-	-
Test Suite ID (old)	-	-
Test case ID (old)	-	-
Customized Field	Text (Single Line)	Text field (Single line), radio button, selection list (multiple choice)
Customized Field	Text (More than one line)	Text field (multiple lines), text field (single line)
Customized Field	Radio Button	Radio button, selection list (multiple choice), text field (1 line)
Customized Field	Checkbox	-
Customized Field	Multiple Choice	Selection list (multiple choice)
Customized Field	Multiple Choices	Selection list (multiple choices)
Customized Field	URL	URL Field
Customized Field	Label	Label
Customized Field	Date	Date Picker
Customized Field	Date + Time	Date + Time Picker
Customized Field	Member	User Picker

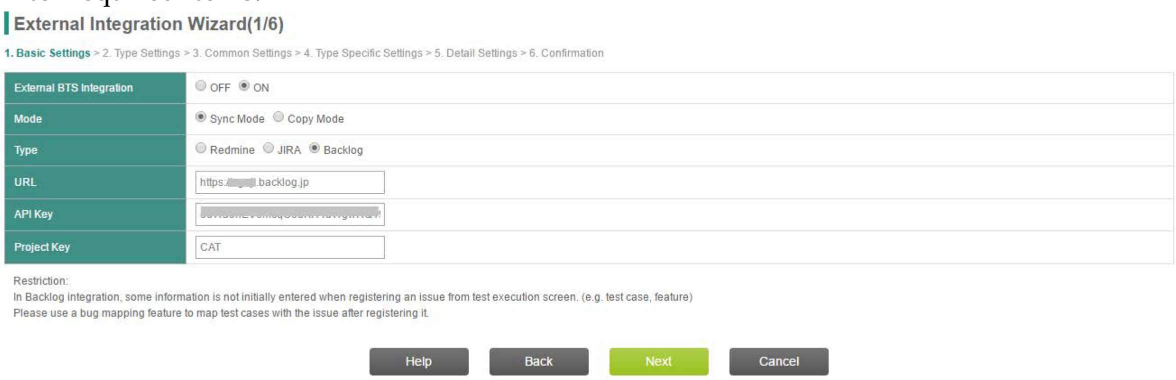
7.4 Working with Backlog

This section illustrates following ways to connect with JIRA.

- Setting the connection with Backlog
- Issue Registration
- Update the connection

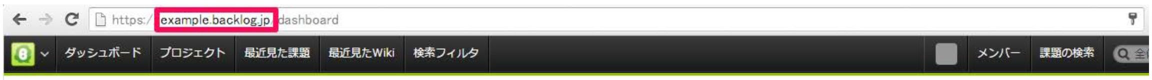
Backlog cooperation settings

(1) Enter required items.

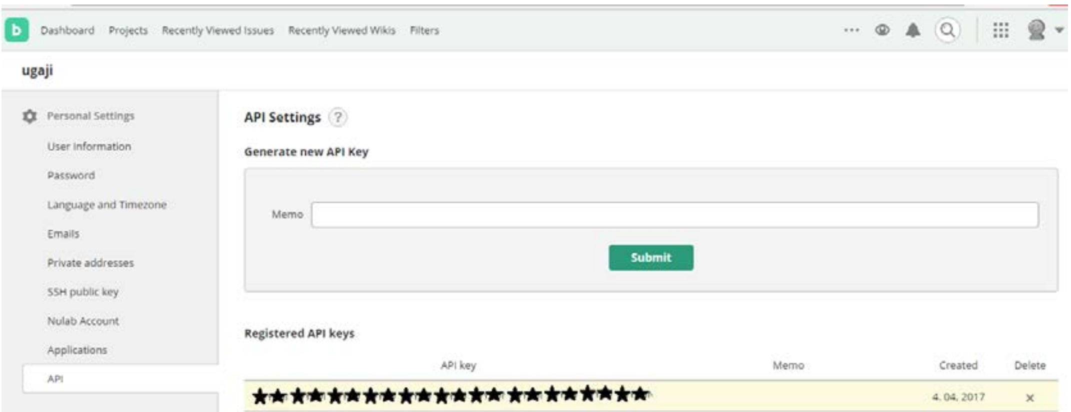


Item Name	Description
External BTS Integration	Switch on/off the External BTS Integration settings.
Mode	Select the synchronous mode.
Type	Select Backlog
URL	Enter the Backlog top page URL.
API Key	Please enter the user name and password for connecting the Backlog. The user account for the connection must have the authentification to view the project.
Project Key	Enter the Backlog's project key in which the user can check on the Backlog's project editing screen.

① Enter the URL of the external BTS. Please enter the URL of Backlog.
In the case of the figure below, the URL is https://example.backlog.jp.



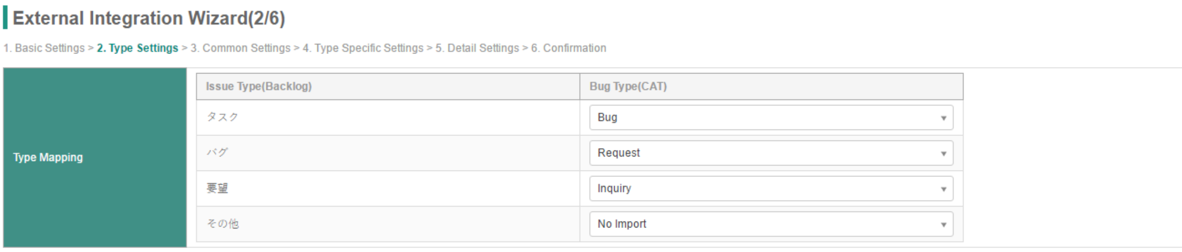
② Enter the Backlog API key in which the user can register and check API in the personal setting. For confirmation, the user account for the Backlog connection must have the authentification to view the project.



③ Please enter the project identifier of the Backlog that connects with CAT. The name in the parenthesis as shown below is the project identifier.

④ Press the Next button after inputting is finished. All required items would get its value with above steps in (1).

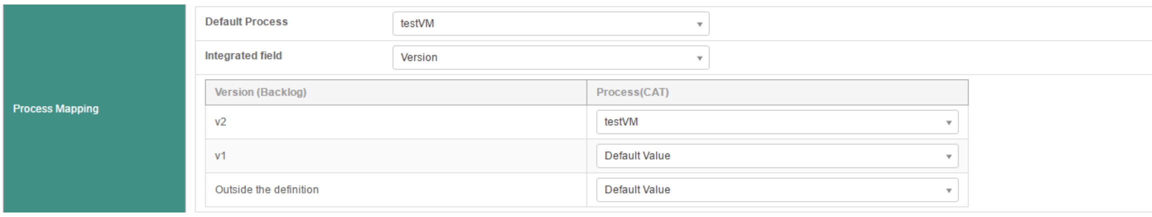
(2) Please select the CAT issue type from the drop-down list that corresponds to the Backlog's issue type for executing the type mapping.



※ At least one type mapping is required.

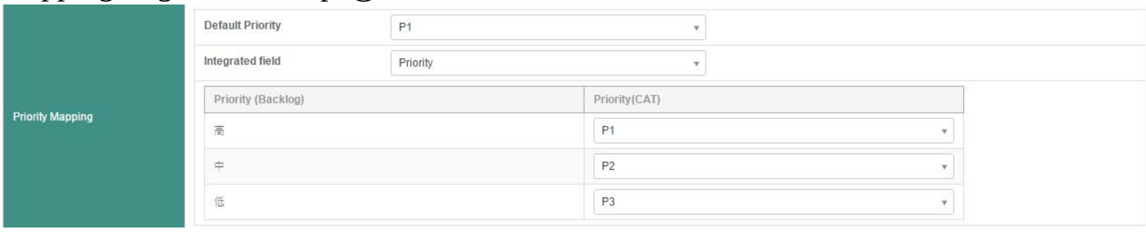
(3) Move to the common settings screen by pressing the next button. There are four item settings on the common settings screen: process mapping, status mapping, priority mapping, severity mapping. Please enter the values that corresponding to Backlog's settings in CAT.

① For executing the process mapping between CAT and Backlog, the default process will be utilized for the connection when the target process is not accessible or there is no corresponding value found. Please select the field to connect from the drop-down list. Please select the CAT process, target version and customized filed from the drop-down menu that corresponds to the Backlog's items.



② Please select the status from the drop-down that corresponds to the Backlog's status for executing the status mapping.

③ Please select the priority that corresponds to the Backlog's priority item for executing the mapping as guided in step ①.

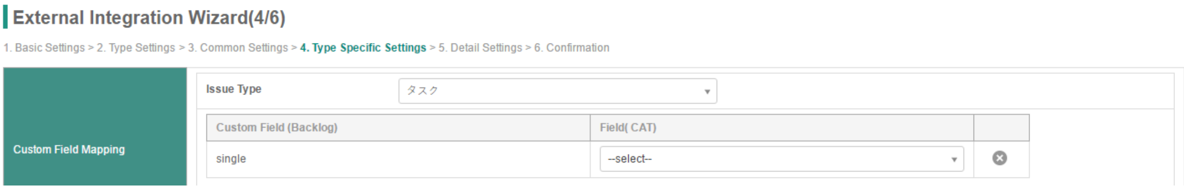


④ Please select the field from the drop-down list for executing the function mapping.

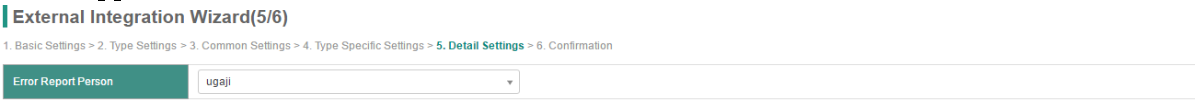
Please refer to "2.3.1 Field mapping relationship of external BTS connection" for more details about field mapping.
The common setting could be completed will all steps in (3) above.

(4) Please select the CAT field that corresponds to the Backlog's customized field for executing the

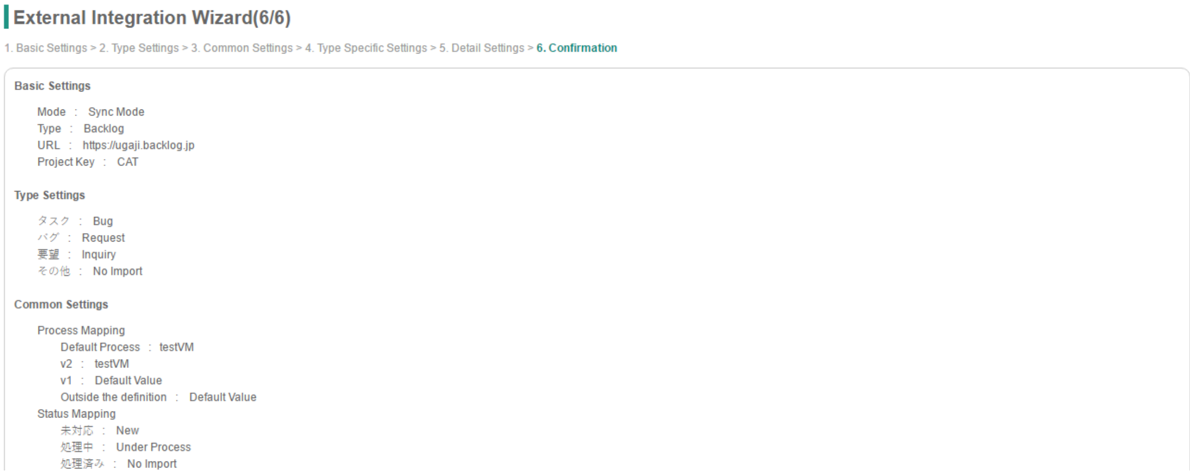
type specific settings connect the test case with an issue if needed.
Besides, all guidances here are for mapping the Backlog's customized fields to CAT's field only.



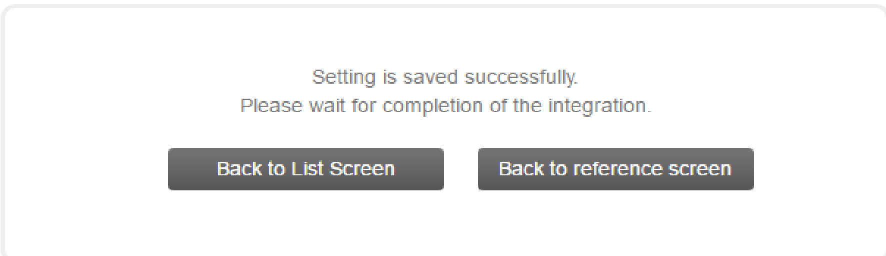
(5) Please select the user to receive the notification email with the error report when connection error happens.



(6) Please press the register button at the bottom of the screen after checking all current settings.

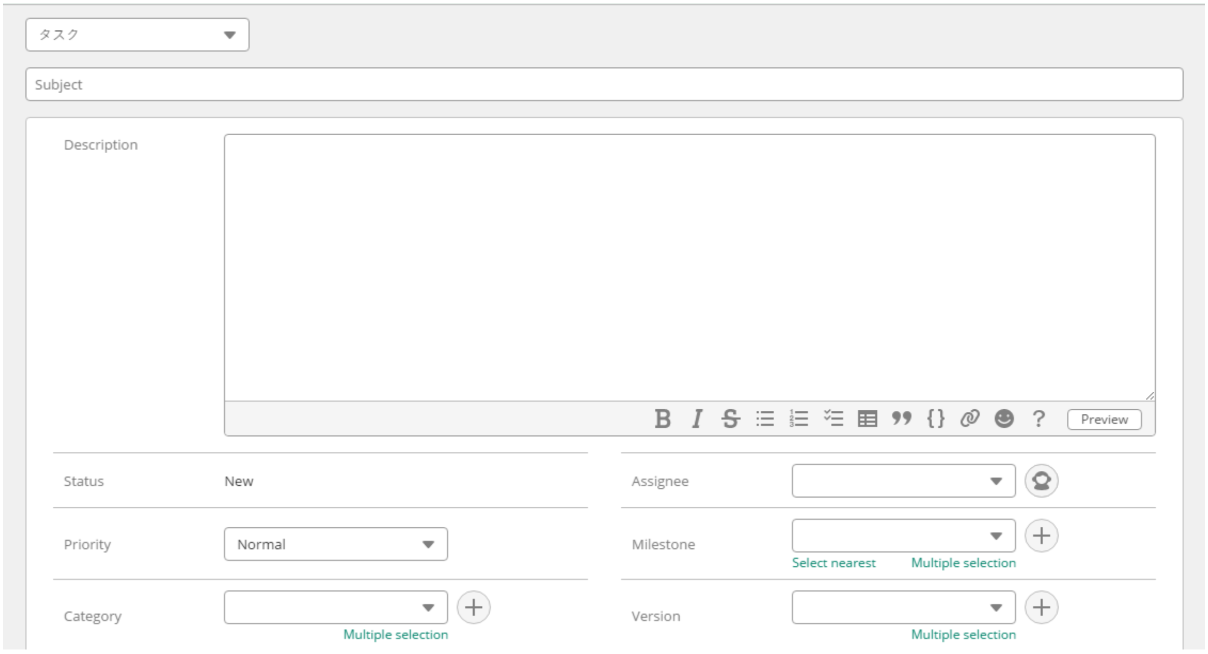


(7) After successful registration confirmation screen will appear. Please press the return to list button or the return to detail button to finish setting the external BTS.



Backlog registration

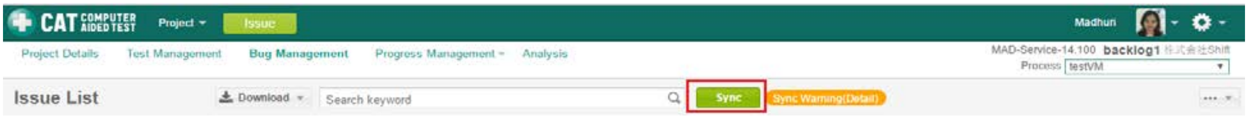
The Backlog issue registration screen will be launched when registering a new issue after connecting with the Backlog. Press the “Add” button to finish the registration after the inputting is done.



Update the Connection

The external BTS connection can be updated by pressing the “Sync” button.
Those problems happeneed when connecting will be displayed in Sync Warning (Detail), which can be shown by pressing the button so that the user can check the detail. The warning happens when there is no value that an issue is holding registered to CAT.

※ Those issues that exist only in CAT will be deleted after the connection updating. Please download all issues from CAT before connecting to the external BTS and upload them to the external BTS.



7.4.1 Backlog Fields Configuration

Following is the correspondence table that maps CAT's field with the external BTS, in which you can refer to when mapping the customized fields. Besides, those customized fields which don't exist in the BTS are not importable.

Backlog

※ Following items are not connectable with Backlog and have to be manually set up when registering the issue.

- Test environment
- Type
- Test case related connection information.

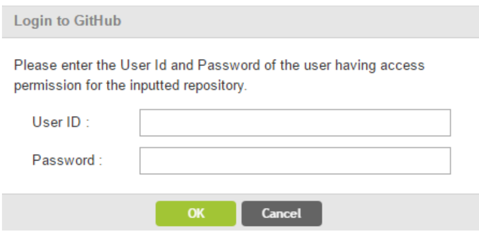
CAT Item – Customized Field	Type	Backlog Field Type
Test Cases	-	String
Test Case Url	-	A Sentence
Customized Field	Text (one line)	String
Customized Field	Text (more than 1 line)	A sentence
Customized Field	Text (one line)	Numeric Value
Customized Field	Date	Date
Customized Field	Multiple Choice	Selection List

7.5 Working with GitHub Issue

Integrating with GitHub Issue makes it easy to copy the issue from CAT to it. Please refer to the way of setting the connection as below:

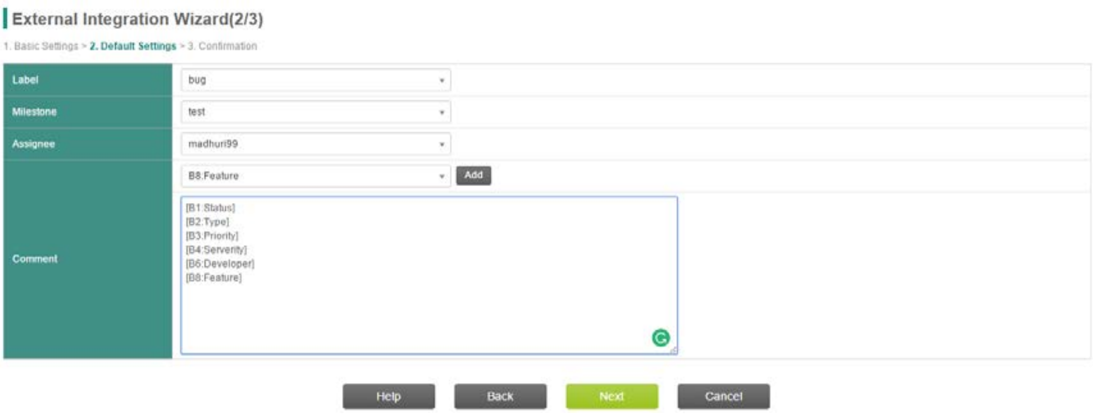
(1) Press the next button after entering the repository name, its user name and password for the connection.

(2) Please enter the user ID and password of the repository owner that contains the authority to overwrite.



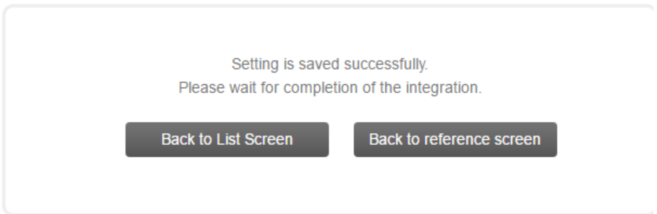
(3) Enter each item and press the Next button. Please enter labels, milestones, people in charge, comments and press the Next button.

Item	Description
Label	Please select the expected value.
Milestone	Please select the initial milestone value.
Assignee	Please select the initial person in charge.
Comment	Please select initial comment. The value will be copied if it was changed by adding the field comment. Example: [B1: Status] The issue's status value was changed.

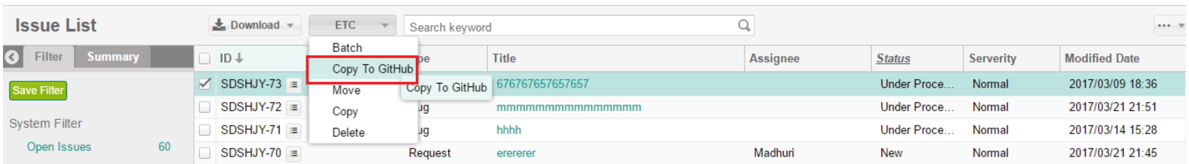


(4) Check all basic settings and default settings and press the register button to finish.

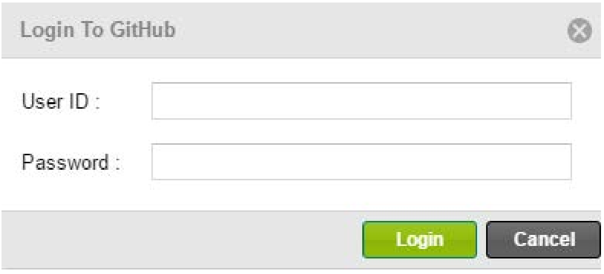
(5) Press the "Back to list screen" or the "Back to reference screen" button on the right popup to end the external BTS setting after GitHub connection is finished.

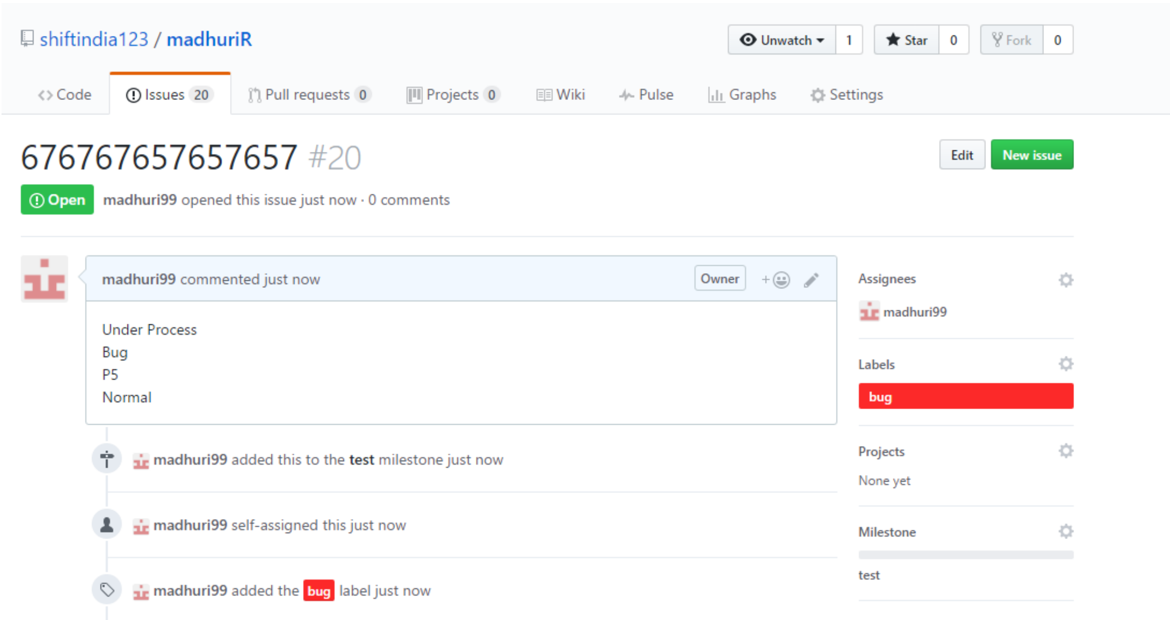


(6) After the connection, the button "Copy to GitHub" will be included in the ETC drop-down list. Please select the issue you'd like to copy to GitHub and press the button.



(7) Please enter the user Id and password of the repository owner with the authority to copy the issue to GitHub Issue.





7.5.1 GitHub Issues' Comment Input Options

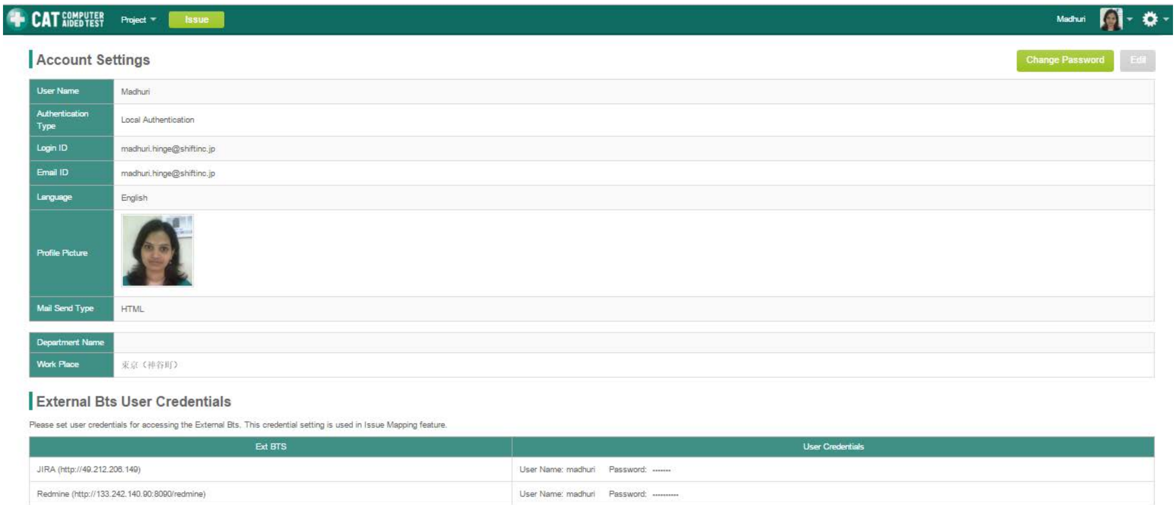
Options that the user can set for GitHub Issue's comments are as below.

Comment Input Field Option
Type
Overview
Status
Case ID
Case URL
Happened Version
Fixed Version
Priority
Severity
Operating procedure
Label
Environment
Function
Developer
Text (one line) (Customized Field)
Text(more than one line) (Customized Field)
Radio Button (Customized Field)
Check Box (Customized Field)
Multiple Choice (Customized Field)
Multiple Choices (Customized Field)
URL (Customized Field)
Select Box (Customized Field)
Date (Customized Field)
Date +Time (Customized Field)
Member (Customized Field)

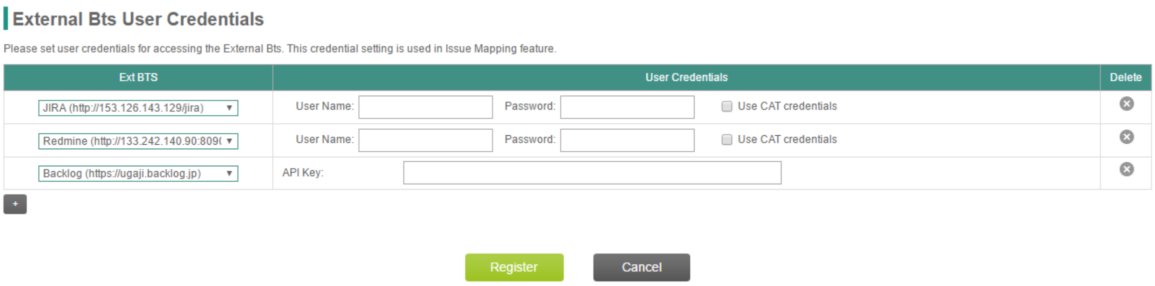
7.6 External BTS Authentication

The user is allowed to set external BTS authentication, which is used for login when registering the issue.

(1) Press the edit button on the account setting screen.



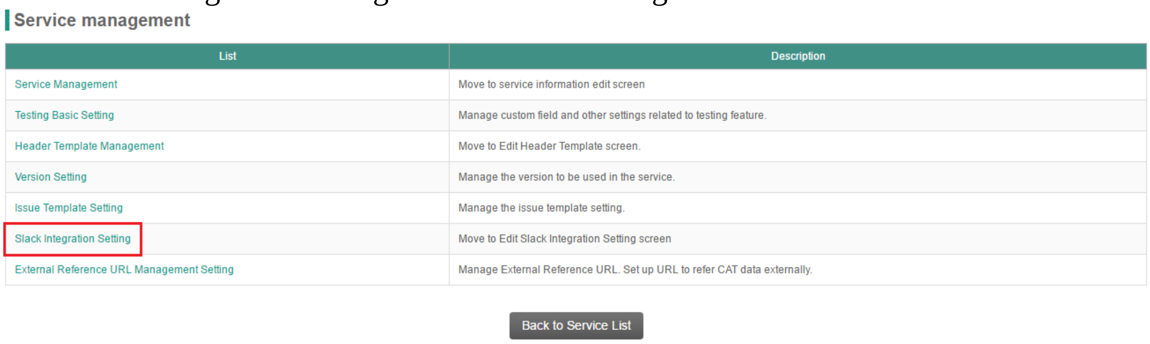
(2) Account setting screen.
The authentication information for accessing external BTS, which is only configurable in the project that the user belongs to and will be used when registering an issue. For connecting Redmine, you have to utilize the user name and the password and API key for Backlog. Please refer to "2.1.3 Working with Backlog" for knowing how to get the API key which is not applicable to GitHub.



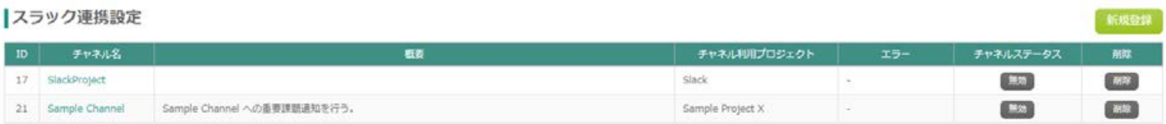
7.7 Slack Integration

This section illustrates the way to set up a Slack integration, in which the issue, testing issue, test ending notification and report can be sent to.

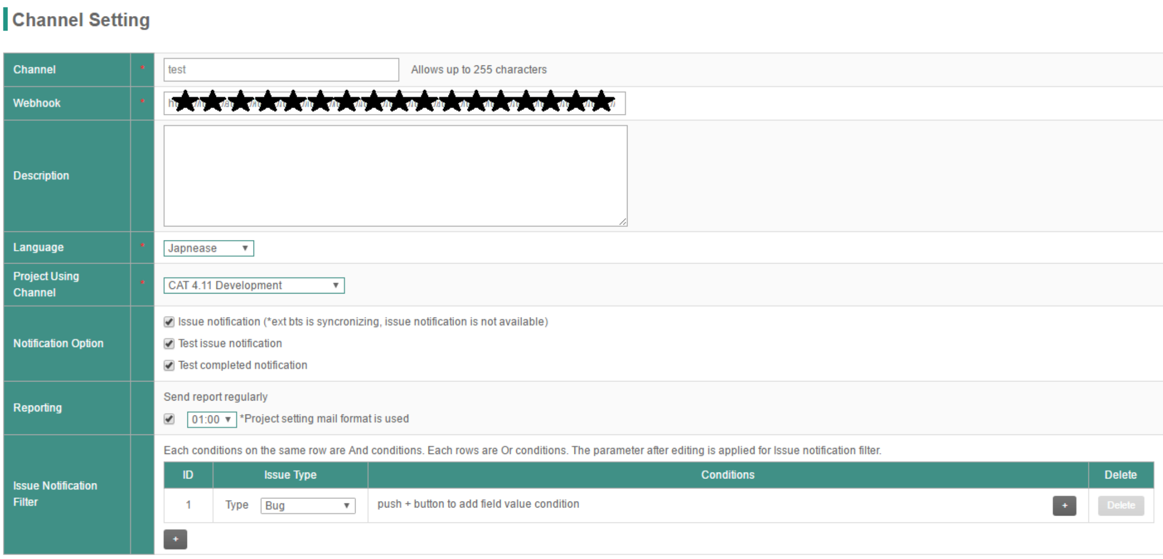
(1) Click Slack Integration setting on the service management screen.



(2) Register or edit the channel, valid, invaild or delete the channel status can be executed on the Slack integration screen. Please press the new button or click the channel to edit to register the channel.



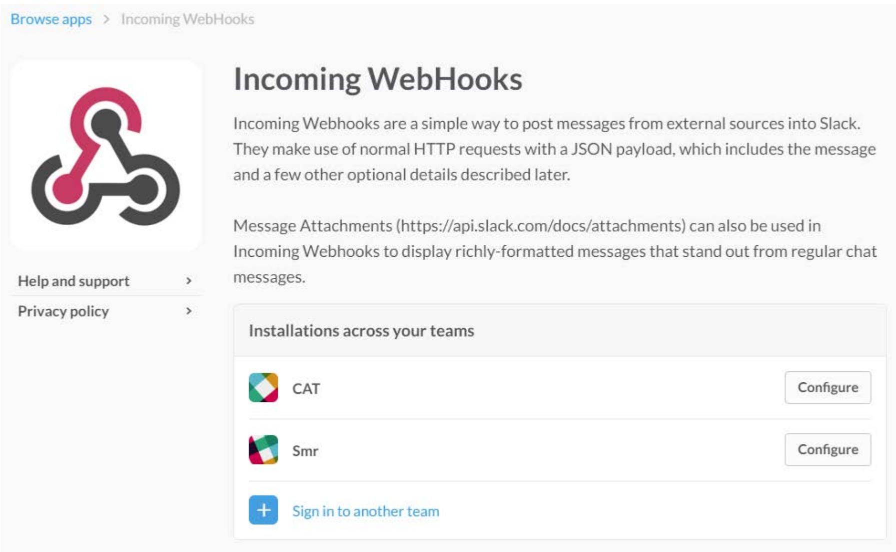
(3) Please enter following required items for channel settings on the channel setting screen.



Item	Description
Channel Name	Please enter a channel name such as the project name to be connected or the channel name to be notified.
Web Hook	Please obtain and input the web hook of the destination channel on Slack. For details on how to obtain Web hooks, please refer to " Getting the Web Hook" below
Language	Please select the notification language.
Channel Use Project	Please select a project to be connected.
Notification Options	Please set the option on for those channels you'd like to get the notification. For details of the notification details, please refer to "Notification Options" below.
Report	The report with content based on the template in the project will be sent at the scheduled time. The content format will the format in the language configurated in the project. Please refer to "3.1 Making a new project" in "4. Project setting management" for the way to edit the format.
Issue Notification Filter	Please refer to "3. Issue notification filter" below for more detail and execute the input.

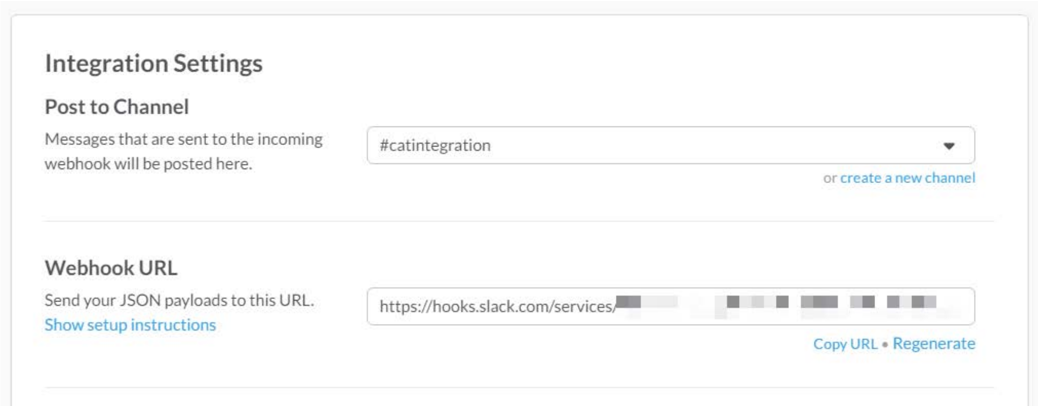
Getting the Web Hook

(1) Open Incoming Web Hooks from Browse apps and click the Configure hold by the team in the channel you'd like to connect with CAT.



(2) Please select the channel to connect with CAT from the team's channel list screen and add a new channel by "Add Configuration" if there is no suitable channel at this moment.

(3) Please copy the Web hook URL displayed and all contents so far are for getting the Web Hook.



Notification Options

Notification options are as the table below.

Item	Description
Issue Notification	The notification will be sent for those create, edit, delete and comment's create, edit and delete actions that fit the issue filter queries. The notification function is not utilizable when CAT is connecting with the External BTS. Please refer to "※ 3. Issue notification filter" for more details related to the issue notification filter function.
Testing Issue notification	The notification of the testing issue creation, main revision (※) and the deletion. ※ The notification will only be sent if the in charge, status or execution control was changed.
Test completion notification	The test completion notification with details will be sent when test cases are all executed, which is equal to the quantities of both on hold and unexecuted test cases become 0.

Issue notification filter

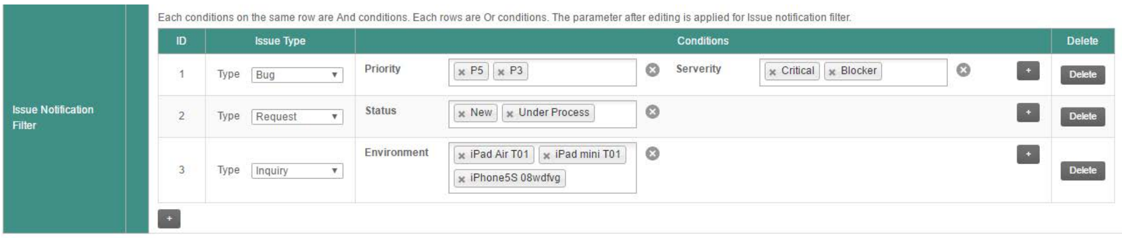
The user can connect to the filter that connects to the issue notification, which contains many criteria assignable.

Field Types

- Multiple choice lists
- Multiple choices list
- Check box
- Radio box
- Member
- Function
- Status
- Version
- Environment

Filter conditions in detail

- The parameters applied to the filter condition when editing an issue will be the parameters after the editing.
- ID 1 will be applied when the accompanying condition is an AND in the below figure. The issue priority will be notified as “Critical” when its value is P4 or P5.
- In the condition such as ID 1 and 2 as below, the notification will be sent when either one of them is triggered. Besides, only one notification will be executed when those 2 are triggered at the same time.
- It’s possible to select more than one test environment and the notification will be sent when any one of them get a new registered issue. In below ID 3 case, the notification will be processed when there is a new registered issue related to iPad mini, iPad mini 2, iPhone 5 S or iPhone 4, which will be executed even when it contains the environment other than these four.



Chapter 8: License Management

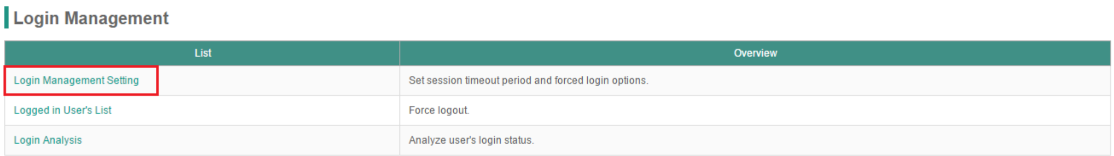
This chapter illustrates the way of license management which can be executed on the license management screen that the user can set up the timeout session only before.

8.1 Session Timeout Settings

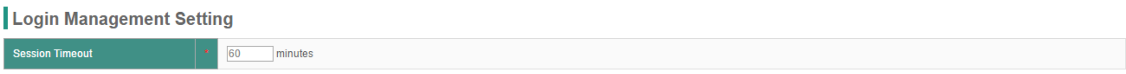
Only the user with administration authentification can execute the login management.

Here is a way of editing login management.

(1) Click the login management setting on the login management screen.



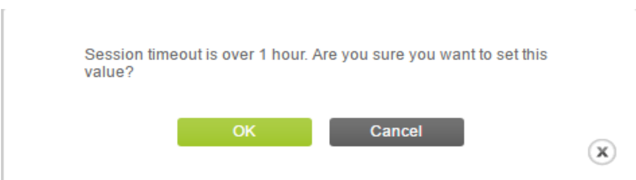
(2) Set up the session timeout and login overview on the login management setting screen.



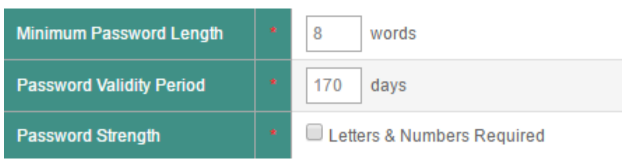
Here are the explanations for each setting.

1. Session timeout time setting.

Here you can set the time for the session timeout. The session timeout period is the time from the user's last operation (involving server access) until its automatic logout. It is recommended for CAT to be less than 60 minutes for the security concern.



2. (The function exclusively in the Download version) Password revision rules.
Those settings (such as the word counts, valid period and character type) that related to the password strength.

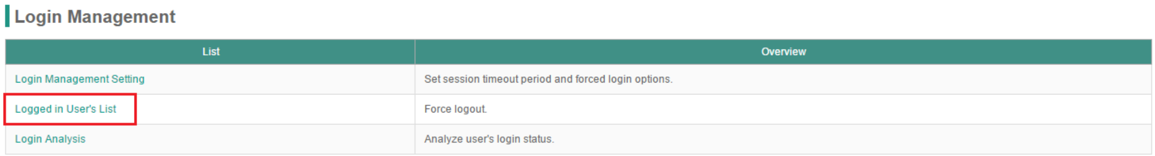


※ If you want to change the password strength of the cloud version, please contact support.

8.2 Logged in Users' List

In the logged in user's list, the user can check all information about the logged in users and execute the log out for anyone of them.

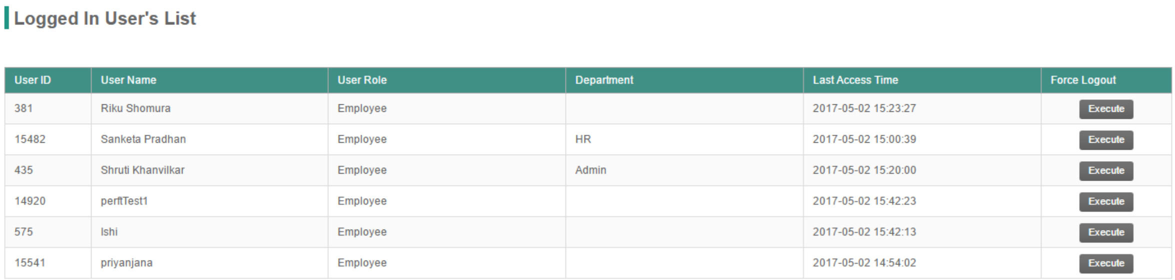
(1) Press the login list.



Login Management

List	Overview
Login Management Setting	Set session timeout period and forced login options.
Logged in User's List	Force logout.
Login Analysis	Analyze user's login status.

(2) Please review all the logged in user information or execute the log out for anyone if needed on the logged in user's list that contains all users' information.



Logged In User's List

User ID	User Name	User Role	Department	Last Access Time	Force Logout
381	Riku Shomura	Employee		2017-05-02 15:23:27	Execute
15482	Sanketa Pradhan	Employee	HR	2017-05-02 15:00:39	Execute
435	Shruti Khanvilkar	Employee	Admin	2017-05-02 15:20:00	Execute
14920	perfTest1	Employee		2017-05-02 15:42:23	Execute
575	Ishi	Employee		2017-05-02 15:42:13	Execute
15541	priyanjana	Employee		2017-05-02 14:54:02	Execute

8.3 Login Analysis

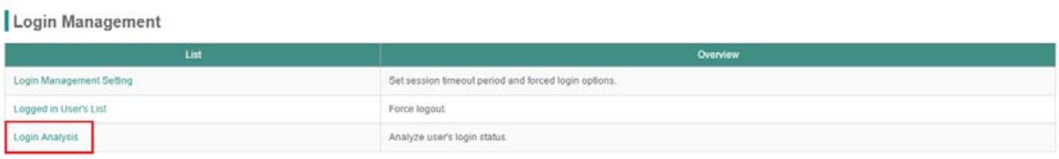
In the login analysis, the user can check using details with a time line to determine whether to add/less the number of licenses.

This section will be illustrated in the following order.

1. Login analysis access
2. Login analysis operation
3. Utilize the graph
4. How to handle the situation when of too many failed logins

(1) Login analysis access method.
Login analysis screen can be launched with following steps:

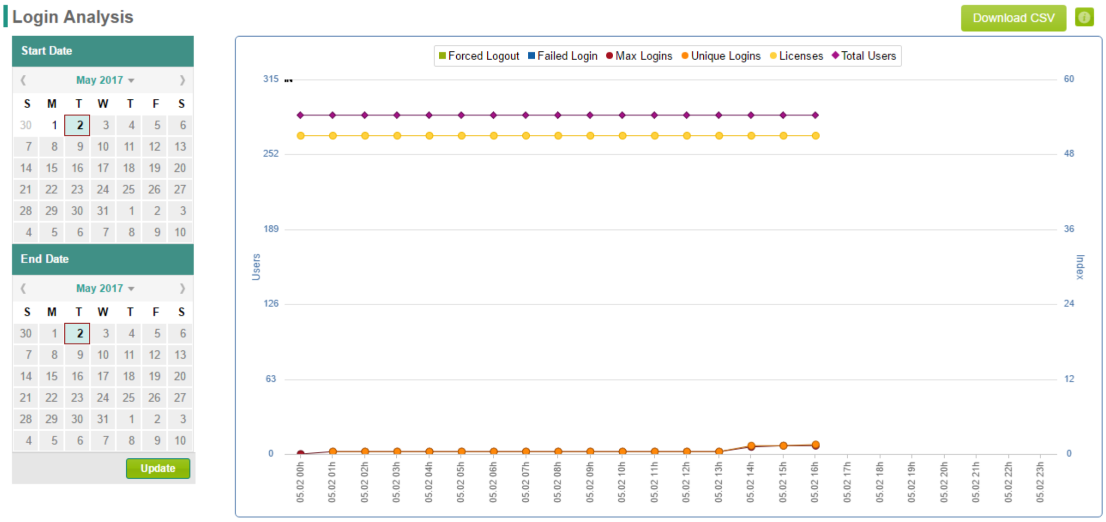
① Click the Login Analysis on the login management screen.



Login Management

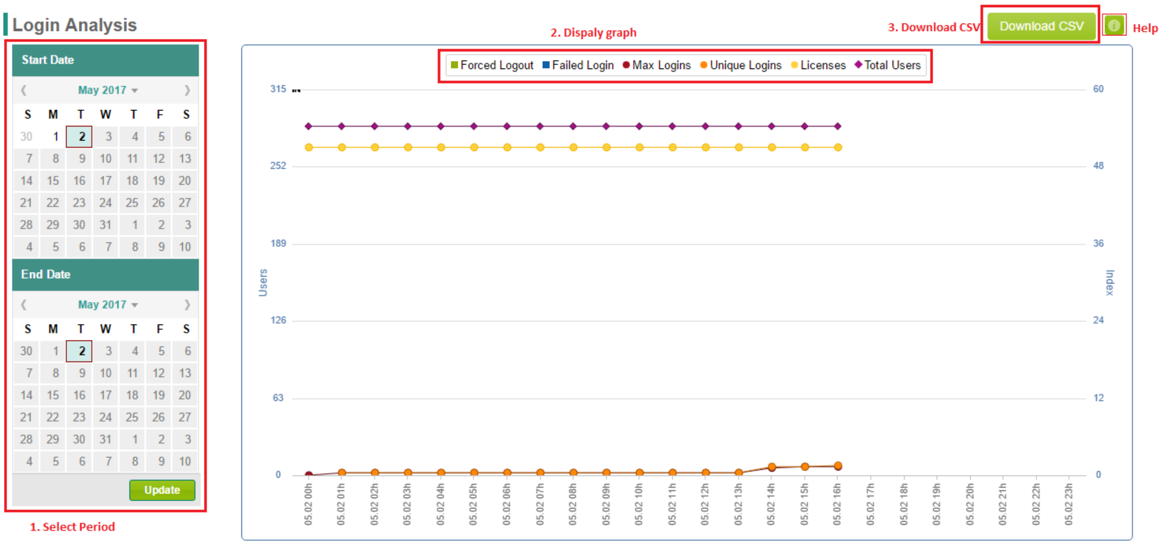
List	Overview
Login Management Setting	Set session timeout period and forced login options.
Logged in User's List	Force logout.
Login Analysis	Analyze user's login status.

② Login analysis screen will be displayed.



(2) Login analysis operations.
Following login analysis operations are executable.

① Select the display period
② Select the display graph
③ Download CSV
④ Display information



① Select the display period.
Here explains the selected period first, which can be set up by pressing the update button after selecting the start day and the end day in the calendar. The time length ranges between 1 and 62 days with units as shown in below tables that will be applied automatically.

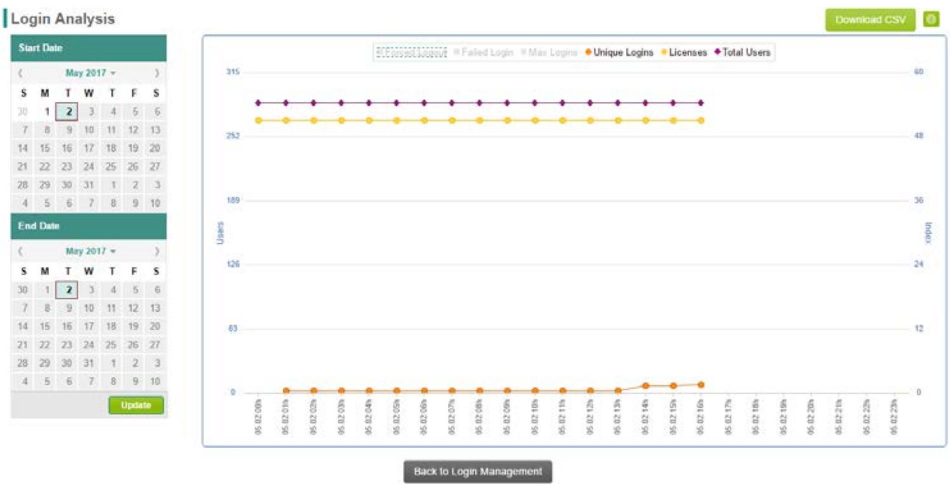
Range	Unit
1-3 Days	Time Unit Display
4-62 Days	Daily Display

② Select the display graph.
Show/hide each graph by clicking on the corresponding legend.

③ Download CSV.
Download all graph data of the current display period as CSV file.

④ Display information.
Show the help information by clicking the information button and it's possible to check the summary of each graph. Please refer to the next section for more details of graph viewing.

(3) Graph Viewing



Here are explanations for each graph.

① Number of unique users (Orange Line).
A unique number of users logged in within the display time unit.

② Number of licenses (Yellow line).
It is the number of licenses under contract. You cannot register a valid user beyond the number of licenses.

③ Number of Users (Effective User) (Purple Line).
The number of enabled users.
Please refer to the login analysis result etc. and see if there is any additional license needed.