

# **TestDirector**

Microsoft Word Add-in Guide  
Version 8.0

## TestDirector Microsoft Word Add-in Guide, Version 8.0

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# Welcome to the TestDirector Microsoft Word Add-in

Welcome to the TestDirector Microsoft Word Add-in, which enables you to export your defined requirements or test plan from Microsoft Word directly to TestDirector's requirements tree or test plan tree.

This add-in supports Microsoft Word 97, 2000, 2003, and XP with TestDirector 8.0 Standard and Enterprise Editions.

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**Note:** This guide explains how to use Microsoft Word with TestDirector. For additional information on using TestDirector, refer to the *TestDirector User's Guide*.

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## Using This Guide

This guide contains two chapters:

### **Chapter 1 Installing and Configuring the Microsoft Word Add-in**

Describes how to install the Microsoft Word Add-in, and how to configure the Microsoft Word security settings.

### **Chapter 2 Exporting Data to TestDirector**

Describes how to define requirements and test plans, and how to export them to TestDirector.

## Documentation Updates

Mercury Interactive is continuously updating its product documentation with new information. You can download the latest version of this document from the Customer Support Web site (<http://support.mercuryinteractive.com>).

**To download updated documentation:**

- 1** In the Customer Support Web site, click the **Documentation** link.
- 2** Under **Select Product Name**, select TestDirector.

Note that if TestDirector does not appear in the list, you must add it to your customer profile. Click **My Account** to update your profile.

- 3** Click **Retrieve**. The Documentation page opens and lists the documentation available for the current release and for previous releases. If a document was recently updated, **Updated** appears next to the document name.
- 4** Click a document link to download the documentation.

## Typographical Conventions

This book uses the following typographical conventions:

- |                   |  |
|-------------------|--|
| <b>1, 2, 3</b>    | Bold numbers indicate steps in a procedure.  |
| ►                 | Bullets indicate options and features.   |
| >                 | The greater than sign separates menu levels (for example, <b>File &gt; Open</b> ).   |
| <b>Stone Sans</b> | The <b>Stone Sans</b> font indicates names of interface elements in a procedure that you perform actions upon (for example, “Click the <b>Run</b> button.”). |
| <b>Bold</b>       | <b>Bold</b> text indicates function names.   |
| <i>Italics</i>    | <i>Italic</i> text indicates variable names, or introduces a new term.   |
| Arial             | The Arial font is used for examples and statements that are to be typed in literally.  |

# 1

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## Installing and Configuring the Microsoft Word Add-in

This chapter describes how to install and configure the Microsoft Word Add-in on your client machine. This add-in enables you to export requirements or test plans from Microsoft Word to TestDirector.

This chapter describes:

- ▶ Installing the Microsoft Word Add-in
- ▶ Configuring the Microsoft Word Security Settings

### Installing the Microsoft Word Add-in

Before you install the Microsoft Word Add-in, make sure that Microsoft Word is installed on your client machine.

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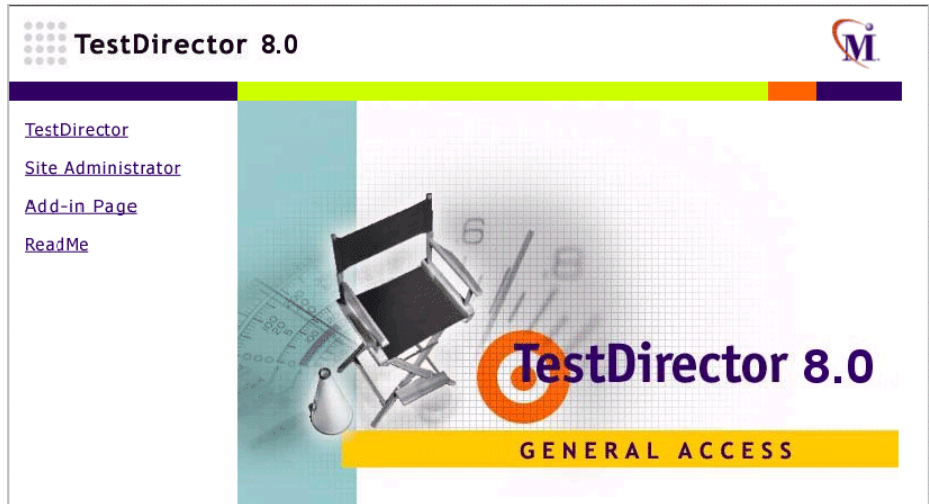
**Note:** To install this add-in, you must log in with administrator privileges.

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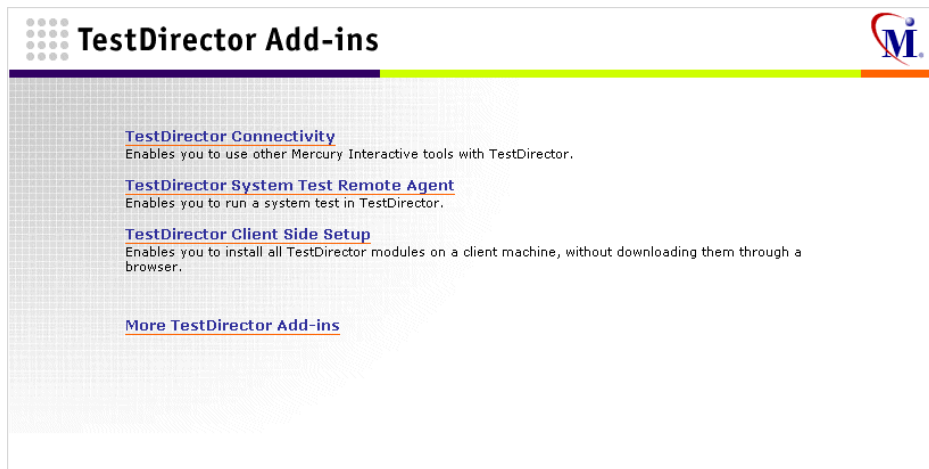
**To install the Microsoft Word Add-in:**

- 1** Close Microsoft Word.
- 2** Uninstall any previous versions of the Microsoft Word Add-in. To uninstall, choose **Start > Settings > Control Panel > Add/Remove Programs**. Select **TestDirector Microsoft Word Add-In** and follow the instructions on your screen.

- 3 Open your Web browser and type your TestDirector URL:  
[http://\[TestDirector server name\]/\[virtual directory name\]/default.htm](http://[TestDirector server name]/[virtual directory name]/default.htm).  
The TestDirector Options window opens.



- 4 Click the **Add-ins Page** link. The TestDirector Add-ins page opens.



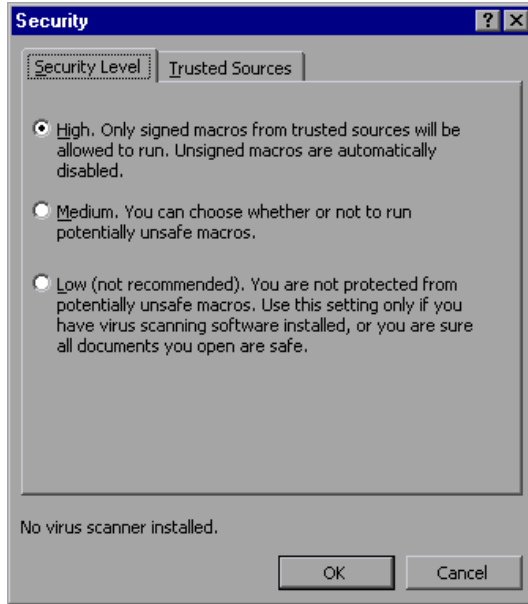
- 5** Click the **More TestDirector Add-ins** link. The More TestDirector Add-ins page opens.
- 6** Under **Microsoft Add-ins**, click the **Microsoft Word** link. The Microsoft Word Add-in page opens.
- 7** Click the **Download Add-in** link. Follow the on-screen installation instructions.
- 8** Navigate back to the TestDirector Add-ins page and click the **TestDirector Connectivity Add-in** link. The TestDirector Connectivity Add-in opens.
- 9** Click **Download Add-in** and install the Connectivity Add-in on your TestDirector client machine.
- 10** If you are using Microsoft Word 2000, 2003, or XP, you must also set your Microsoft Word security settings after you install the Microsoft Word Add-in. For more information, see “Configuring the Microsoft Word Security Settings”.

## **Configuring the Microsoft Word Security Settings**

If you are working with Microsoft Word 2000, 2003, or XP, after you install the Microsoft Word Add-in, you must also configure your Microsoft Word security settings.

**To configure the Microsoft Word security settings:**

- 1** In Microsoft Word, choose **Tools > Macro > Security**. The Security dialog box opens.



- 2** In Microsoft Word 2000, select one of the following options:
  - ▶ Select **Medium**. In the **Trusted Sources** tab, select **Trust all installed add-ins and templates**. Click **OK** to close the Security dialog box.
  - ▶ Select **Low**. In the **Trusted Sources** tab, clear **Trust all installed add-ins and templates**. Click **OK** to close the Security dialog box. Close and reopen Microsoft Word. The macros dialog box opens. Click **Enable Macros** to enable the Microsoft Word Add-in.
- 3** In Microsoft Word 2003 or Microsoft Word XP, to set the security settings:

Select **Medium**. In the **Trusted Sources** tab, clear **Trust all installed add-ins and templates**. Click **OK** to close the Security dialog box. Close and reopen Microsoft Word. The macros dialog box opens. Click **Enable Macros** to enable the Microsoft Word Add-in.

# 2

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## Exporting Data to TestDirector

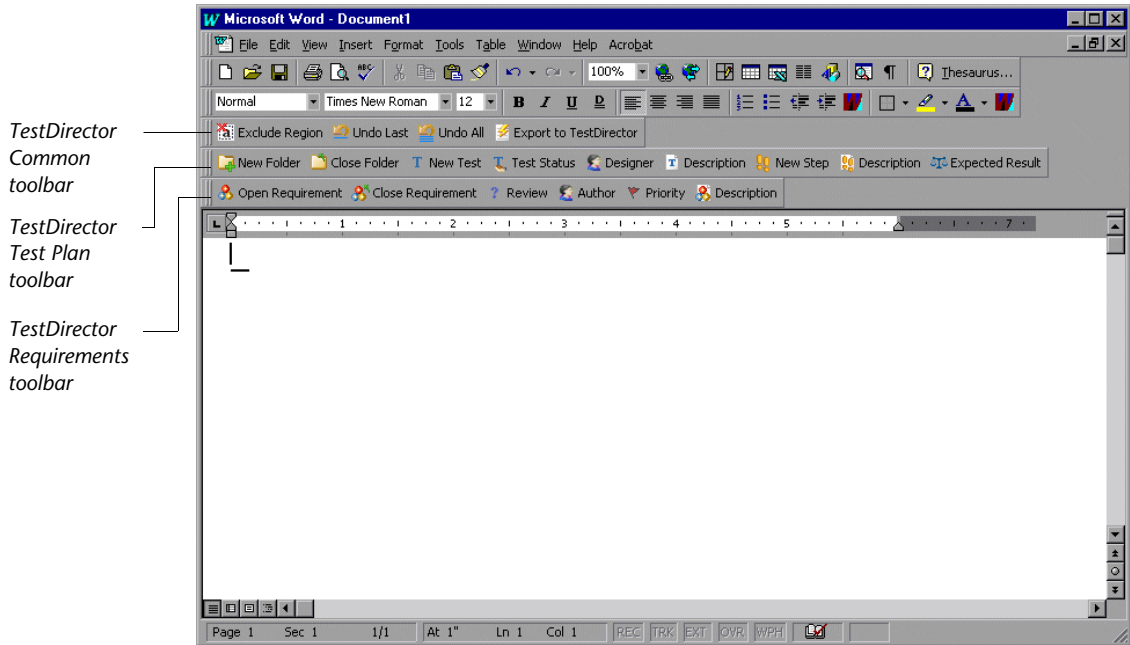
After installing the Microsoft Word Add-in, you can define requirements or test plans in a Microsoft Word document, and export them to TestDirector.

This chapter describes:

- ▶ The Microsoft Word Window
- ▶ Defining Requirements
- ▶ Defining Test Plans
- ▶ Exporting to TestDirector

## The Microsoft Word Window

After you install the Microsoft Word Add-in, open Microsoft Word.











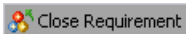



The Microsoft Word Add-in adds the following toolbars:

- *TestDirector Common toolbar*, containing buttons commonly used when exporting requirements and test plans. To display or hide the toolbar, choose **View > Toolbars > TestDirector Common**.
- *TestDirector Test Plan toolbar*, containing buttons used when defining test plans. To display or hide the toolbar, choose **View > Toolbars > TestDirector Test Plan**.
- *TestDirector Requirements toolbar*, containing buttons used when defining requirements. To display or hide the toolbar, choose **View > Toolbars > TestDirector Requirements**.










## Defining Requirements

Before you can export your requirements to TestDirector, you define the requirements in your document. To define a requirement, highlight a requirement text line and click a button on the TestDirector Requirements toolbar. An icon is added next to the text line. You can define the following details for each requirement:

To define	Click	Icon created
a requirement	 Open Requirement	
the review status of a requirement	 Review	
the author of a requirement	 Author	
the priority of a requirement	 Priority	
the description of a requirement	 Description	
the hierarchical level of a requirement	 Close Requirement	

You can define the requirements so that when you export them to TestDirector, the requirements are displayed on the same hierarchical level, or different hierarchical levels in your requirements tree.

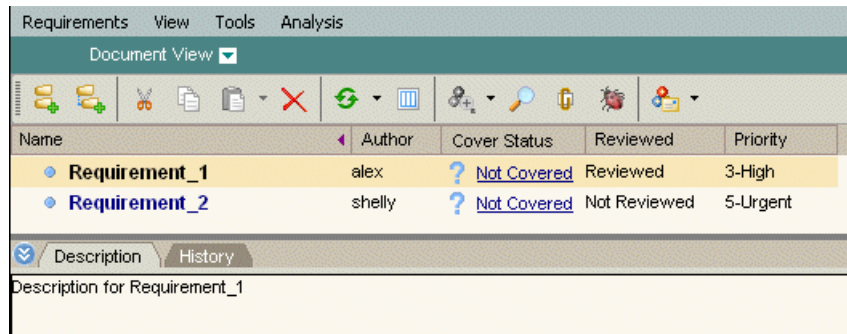
For example, suppose that in your document you defined two requirements:  
*Requirement\_1* and *Requirement\_2*.

-  Requirement\_1
-  Reviewed
-  Alex
-  3-High
-  Description for Requirement\_1
  
-  Requirement\_2
-  Not Reviewed
-  Shelly
-  5-Urgent
-  Description for Requirement\_2






To define the requirements on the same hierarchical level in the requirements tree, you must close each requirement as defined in the following example:






-  Requirement\_1
-  Reviewed
-  Alex
-  3-High
-  Description for Requirement\_1
- 
  
-  Requirement\_2
-  Not Reviewed
-  Shelly
-  5-Urgent
-  Description for Requirement\_2
- 


After you export the requirements to TestDirector, the requirements are displayed on the same hierarchical level.




You can also define requirements on different hierarchical levels in the requirements tree. For example, suppose you want to define *Requirement\_2* as a child of *Requirement\_1*, and *Requirement\_3* and *Requirement\_4* as children of *Requirement\_2*. You must close each requirement as defined in the following example:

 Requirement\_1  
 Reviewed  
 alex  
 3-High  
 Description for Requirement\_1

 Requirement\_2  
 Not Reviewed  
 shelly  
 5-Urgent  
 Description for Requirement\_2

 Requirement\_3



 Requirement\_4



After you export the requirements to TestDirector, *Requirement\_2* is displayed as a child of *Requirement\_1*, and *Requirement\_3* and *Requirement\_4* are displayed as children of *Requirement\_2*.

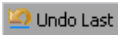
• Requirement_1	alex	? Not Covered	Reviewed	3-High
▣ • Requirement_2	shelly	? Not Covered	Not Reviewed	5-Urgent
▣ Requirement_3	admin	? Not Covered		
▣ Requirement_4	admin	? Not Covered		

### To define a requirement:

- 1 Start Microsoft Word, and open your requirements document.
- 2 Highlight a text line in your document, and click a button on the TestDirector Requirements toolbar. Repeat for each text line.
- 3 To define requirements on the same hierarchical level, insert a line at the end of each requirement, and click the **Close Requirement** button.

To define requirements on different hierarchical levels, insert a line at the end of the last requirement, and click the **Close Requirement** button. Repeat for each requirement.

- 4 To delete a defined object, you can:



- Click the **Undo Last** button on the TestDirector Common toolbar to delete the last entry. A message box opens. Click **Yes** to delete the object.



- Click the **Undo All** button on the TestDirector Common toolbar to delete all objects in the document. Click **Yes** to delete all objects.

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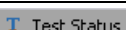







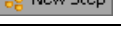

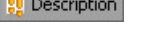

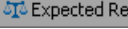

**Note:** If you delete a defined object manually, you must also delete its associated bookmark. If you do not delete the bookmark, an error occurs when you attempt to export the object, because it is referring to an existing bookmark. To manually delete the associated bookmark, choose **Insert > Bookmark**. The Bookmark dialog box opens. Delete the associated bookmark.

---

- 5 Export the requirements to TestDirector. For more information, see “Exporting to TestDirector” on page 17.









## Defining Test Plans









Before you can export your test plan to TestDirector, you define the test plan in your document. To define a test plan, highlight a text line and click a button on the TestDirector Test Plan toolbar. An icon is added next to the text line. You can define the following details in your test plan:

To define	Click	Icon created
a subject folder		
a test		
the current status of a test		
the designer of a test		
the description of a test		
a test step		
the description of a step		
the expected results of a step		
the hierarchical level of a subject folder		

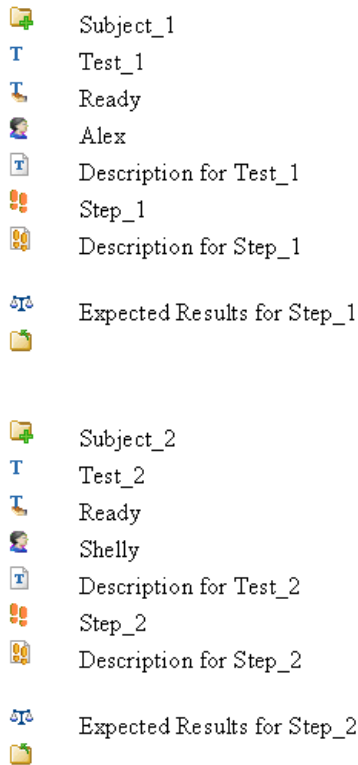
You can define the test plan so that when you export it to TestDirector, the test subjects are displayed on the same hierarchical level, or different hierarchical levels in your test plan tree.

For example, suppose that in your document you defined two subject folders: *Subject\_1* and *Subject\_2*.

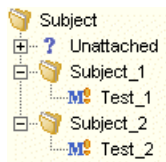
-  Subject\_1
-  Test\_1
-  Ready
-  Alex
-  Description for Test\_1
-  Step\_1
-  Description for Step\_1
  
-  Expected Results for Step\_1

-  Subject\_2
-  Test\_2
-  Ready
-  Shelly
-  Description for Test\_2
-  Step\_2
-  Description for Step\_2
  
-  Expected Results for Step\_2

To define the subject folders on the same hierarchical level in your test plan tree, you must close each subject folder as defined in the following example:

























After you export the test plan to TestDirector, the subject folders in the test plan tree are displayed on the same hierarchical level.

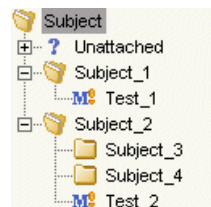


You can also define subject folders on different hierarchical levels in the test plan tree. For example, suppose you want to define *Subject\_2* as a subfolder of *Subject\_1*, and *Subject\_3* and *Subject\_4* as subfolders of *Subject\_2*.

You must close each subject folder as defined in the following example:

-  Subject\_1
-  Test\_1
-  Ready
-  Alex
-  Description for Test\_1
-  Step\_1
-  Description for Step\_1
-  Expected Results for Step\_1
  
-  Subject\_2
-  Test\_2
-  Ready
-  Shelly
-  Description for Test\_2
-  Step\_2
-  Description for Step\_2
-  Expected Results for Step\_2
  
-  Subject\_3
- 
  
-  Subject\_4
- 
  
- 
- 

After you export the test plan to TestDirector, *Subject\_2* is displayed as a subfolder of *Subject\_1*, and *Subject\_3* and *Subject\_4* are displayed as subfolders of *Subject\_2*.

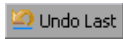


**To define a test plan:**

- 1** Start Microsoft Word, and open your test plan document.
- 2** Highlight a text line in your document, and click a button on the TestDirector Test Plan toolbar. Repeat for each text line.
- 3** To define subject folders on the same hierarchical level, insert a line at the end of each subject folder, and click the **Close Folder** button.

To define subject folders on different hierarchical levels, insert a line at the end of the last subject folder, and click the **Close Folder** button. Repeat for each subject folder.

- 4** To delete a defined object, you can:



- Click the **Undo Last** button on the TestDirector Common toolbar to delete the last entry. A message box opens. Click **Yes** to delete the object.



- Click the **Undo All** button on the TestDirector Common toolbar to delete all objects in the document. Click **Yes** to delete all objects.

---

**Note:** If you delete a defined object manually, you must also delete its associated bookmark. If you do not delete the bookmark, an error occurs when you attempt to export the object, because it is referring to an existing bookmark. To manually delete the associated bookmark, choose **Insert > Bookmark**. The Bookmark dialog box opens. Delete the associated bookmark.

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- 5** Export the test plan to TestDirector. For more information, see “Exporting to TestDirector”.

## Exporting to TestDirector

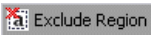
After you define requirements or test plans in your Microsoft Word document, you can export them to TestDirector.

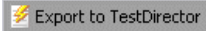
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### Notes:

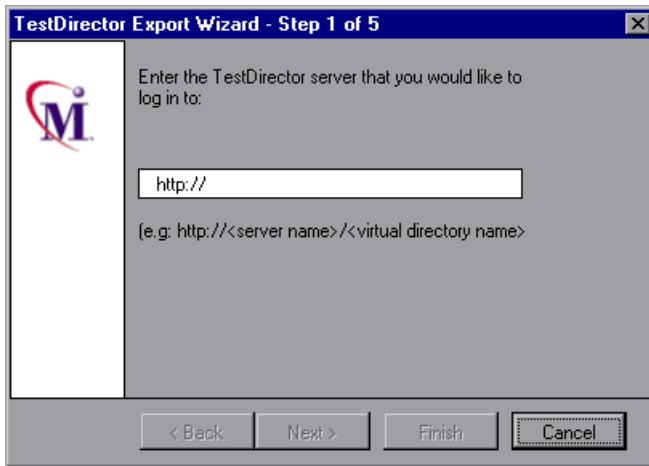
- ▶ Before you export requirements and tests to TestDirector, make sure that they have unique names. If a name is not unique, it will be overwritten. For example, suppose your document contains two requirements in a particular hierarchy with the same name, only one will be created. Its value will be that of the second requirement. The same applies to the design steps of a test. If there are design steps without a name, or if more than one design step with the same name exists, then only a single design step will be created.
  - ▶ When you export a new or existing requirement or test to TestDirector, it is created with the user name that you use to export it. For example, if you export a requirement to TestDirector with 'steve' as the user name, the requirement's history shows 'steve' as the person that changed the requirement.
  - ▶ You must have full create and modify permissions in TestDirector for the type of record that you are exporting. For example, if you are exporting a test, you must have permissions for adding and modifying the test plan tree, design steps, and folders.
- 

### To export to TestDirector:

- 1 Define the requirements in your document. For more information, see “Defining Requirements” on page 7.
- 2 Define the test plans in your document. For more information, see “Defining Test Plans” on page 12.
- 3  To exclude a text area in your document from being exported, highlight the text area and click the **Exclude Region** button. A line is drawn through the selected text.

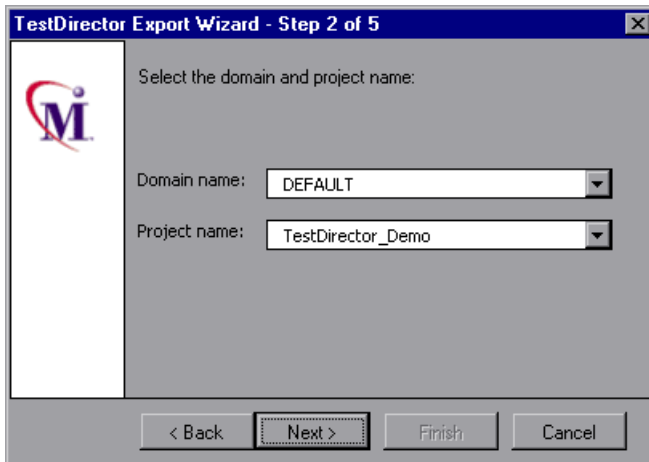


- 4 Click the **Export to TestDirector** button. The TestDirector Export Wizard - Step 1 of 5 dialog box opens.



Type your TestDirector server and virtual directory name:  
`http://[TestDirector server name]/[virtual directory name]`.

- 5 Click **Next**. The TestDirector Export Wizard - Step 2 of 5 dialog box opens.



Select a domain and project name.

- 6 Click **Next**. The TestDirector Export Wizard - Step 3 of 5 dialog box opens.

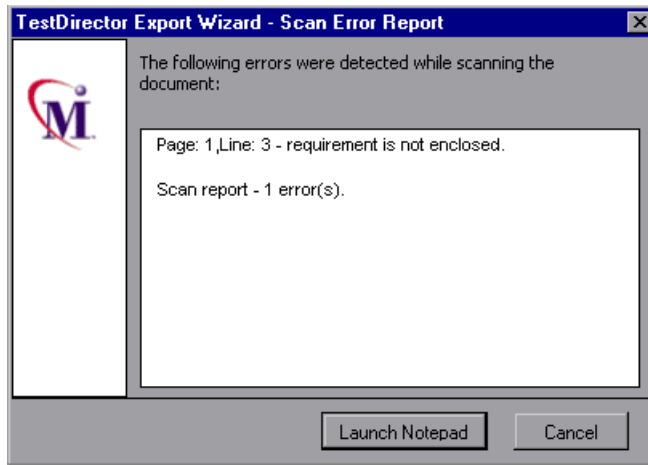


Enter your user name and password.

- 7 Click **Next**. The TestDirector Export Wizard - Step 4 of 5 dialog box opens.



- 8 If an error occurs while exporting the document, the TestDirector Export Wizard - Scan Error Report dialog box opens.



Review the errors. To save the errors as a text file, click the **Launch Notepad** button.

Click **Cancel** to exit the wizard. Correct the errors and start again at step 1 on page 17.

- 9 If you have successfully exported your document to TestDirector, the TestDirector Export Wizard - Step 5 of 5 dialog box opens.



Click **Finish**.

