

TestDirector

Version Control Add-in Guide

Version 8.0

TestDirector Version Control Add-in Guide, Version 8.0

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Welcome to the TestDirector Version Control Add-in

Welcome to the TestDirector Version Control Add-in, enabling you to keep track of the changes you make to the testing information in your TestDirector projects. This add-in supports TestDirector 8.0 Enterprise Edition Service Pack 1 and later.

You can update and revise your manual, WinRunner, QuickTest Professional, Astra QuickTest, or VAPI-XP tests, while maintaining previous versions of each test. This allows you to keep track of the changes made to each test in your TestDirector project, see how and when a test was modified, or return to a previous version of the test.

After you install the TestDirector Version Control Add-in and enable it in TestDirector, you can create a version control-enabled project. You can check test versions in and out of the project. When you check out a test, the test is locked in the project. This prevents other users of the project from overwriting any changes you make to the test.

When you finish working on the test, you check it into the project. The test is unlocked. The test version is now available to the other project users.

Notes:

- ▶ This guide explains how to set up and use version control with TestDirector. For additional information on using TestDirector, refer to the *TestDirector User's Guide* and the *TestDirector Administrator's Guide*.
 - ▶ If you are using Microsoft Visual SourceSafe, refer to the *TestDirector Microsoft Visual SourceSafe Add-in Guide*. If you are using Rational ClearCase, refer to the *TestDirector Rational ClearCase Add-in Guide*.
-

System Requirements

To work with TestDirector version control:

- ▶ Install a supported third party version control tool on your TestDirector server machine. TestDirector currently supports Microsoft Visual SourceSafe, Rational ClearCase, and other third party version control tools.
- ▶ Install a TestDirector version control add-in on your TestDirector server machine.

For more information, refer to the TestDirector Add-ins page.

Using This Guide

This guide contains the following chapters:

Chapter 1 Setting up TestDirector with Version Control

Describes how to configure TestDirector to work with version control and create version control-enabled projects.

Chapter 2 Working with Version Control

Describes how to use TestDirector with version control-enabled projects.

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:

- | | |
|-------------------|--|
| 1, 2, 3 | Bold numbers indicate steps in a procedure. |
| ► | Bullets indicate options and features. |
| > | The greater than sign separates menu levels (for example, File > Open). |
| Stone Sans | The Stone Sans font indicates names of interface elements in a procedure that you perform actions upon (for example, “Click the Run button.”). |
| Bold | Bold 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

Setting up TestDirector with Version Control

After installing the Version Control Add-in, you enable it to create version control-enabled projects.

This chapter describes:

- ▶ Enabling Version Control for your Site
- ▶ Enabling Version Control for a Project
- ▶ Creating a New Project with Version Control
- ▶ Disabling Version Control for a Project

Enabling Version Control for your Site

After you install the Version Control Add-in, you enable it in the Site Administrator.

To enable version control:

- 1** In the TestDirector Options window, click the **Site Administrator** link. Alternatively, on the TestDirector server machine, choose **Start > Programs > TestDirector 8.0 > Site Administrator**.

The Site Administrator Login window opens.

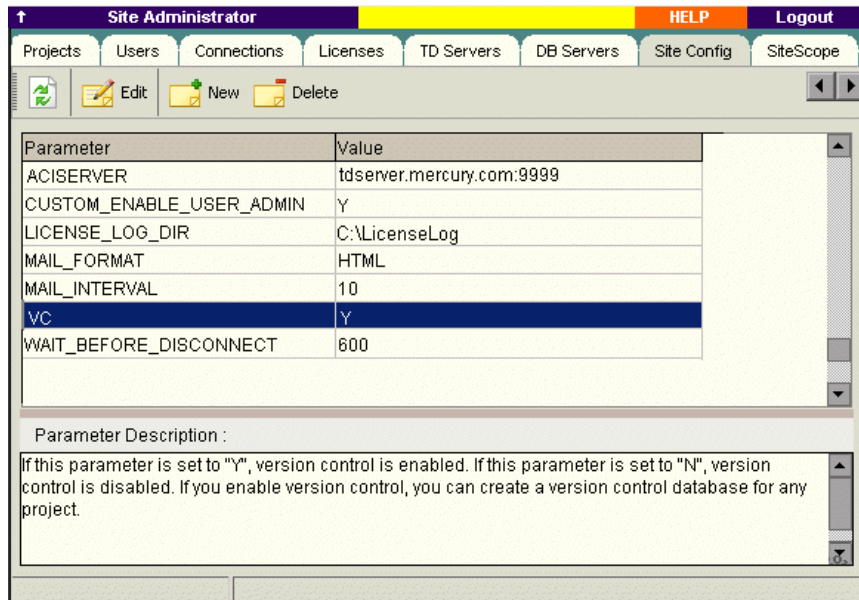


2 In the **Password** box, type your Site Administrator password.

Login

3 Click **Login**. The Site Administrator opens.

4 Click the **Site Config** tab in the Site Administrator.



5 Select the **VC** parameter and click the **Edit Parameter** button. The Edit Parameter dialog box opens.

6 To enable version control, type Y and click **OK**.

Note: To disable version control for a site, type N and click **OK**.

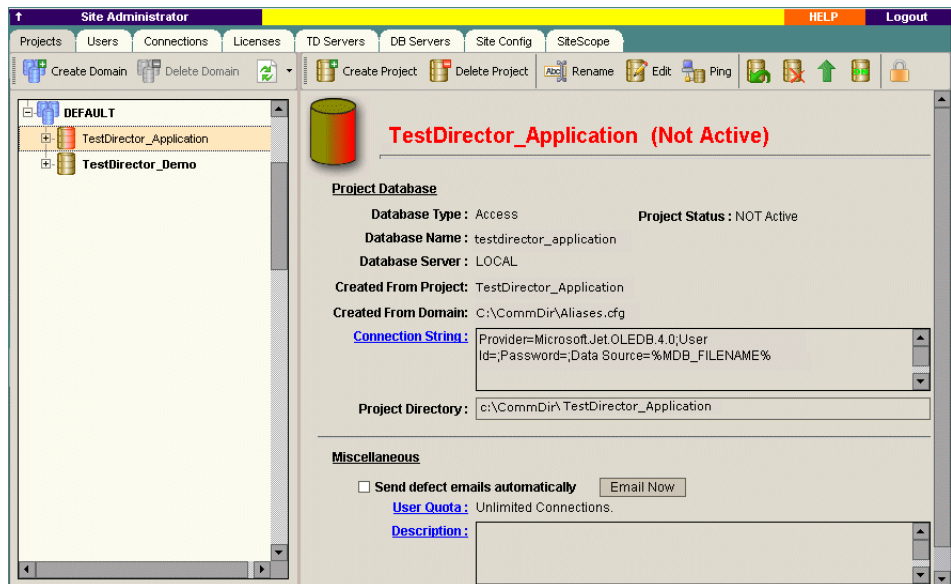
Enabling Version Control for a Project

When you enable version control for a project, TestDirector creates a new version control database in your version control tool. You can add all tests in your project to the database immediately. Alternatively, you can instruct TestDirector to add each test individually when you perform a version control action.

Note: If your TestDirector server becomes unavailable while you are enabling version control, you can resume the enabling process at a later stage. For more information, see “Resuming the Version Control Enabling Process” on page 6.

To enable version control for a project:

- 1 In the Site Administrator, click the **Projects** tab.



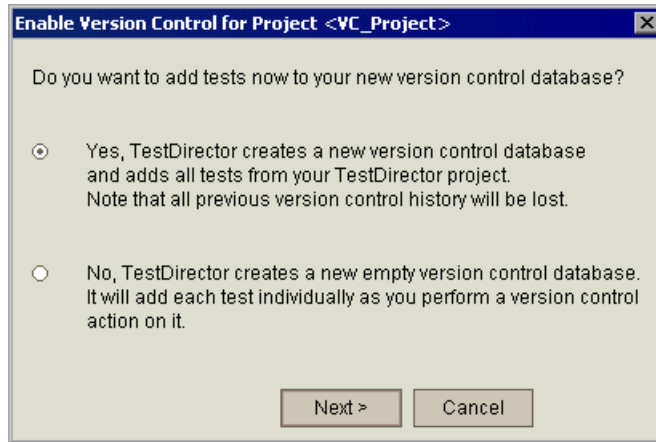
2 Select a project in the Projects list.



3 Click the **Enable Version Control** button.

4 If the project is active, click **Yes** to deactivate it. Click **OK** to confirm.

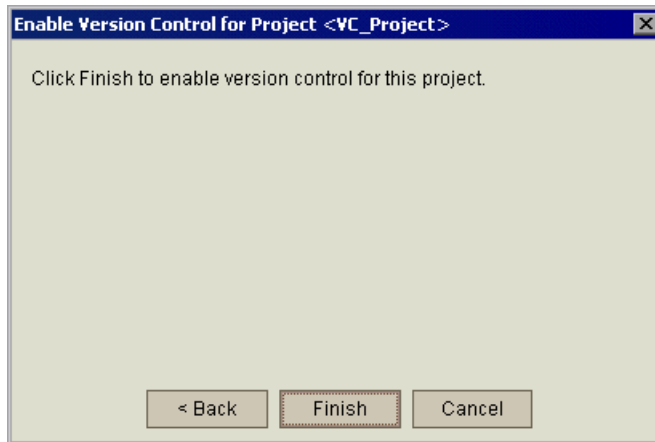
The Enable Version Control for Project dialog box opens.



5 Select a method for enabling version control:

- Click **Yes** to add all your tests to the version control database immediately. Note that this may be time consuming depending on the size and number of tests in your project.
- Click **No** to create an empty version control database for your project.

Click **Next**. The following dialog box opens.



- 6 Click **Finish** to enable version control for the project.
- 7 Click **OK**. Version control is enabled. TestDirector displays a lock icon next to the project name in the Projects list.
- 8 To activate the project, click the **Activate Project** button. TestDirector changes the project icon to yellow.



Resuming the Version Control Enabling Process

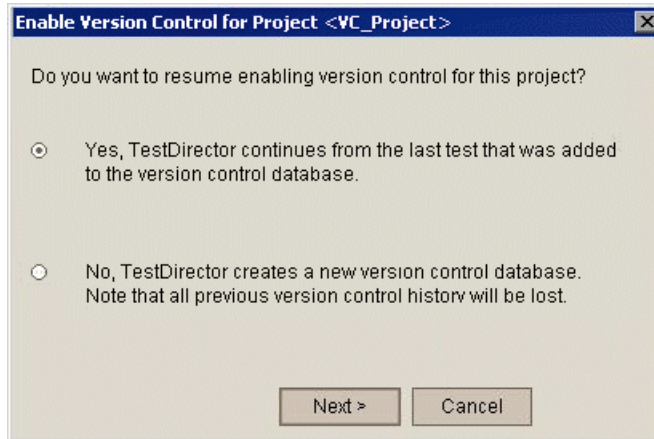
If your TestDirector server becomes unavailable while you are enabling version control for a project, you can resume the enabling process at a later stage.

To resume enabling version control:

- 1 Restart the TestDirector server and log in to the Site Administrator.
- 2 In the Site Administrator, click the **Projects** tab.
- 3 In the Projects list, select the project for which you want to resume enabling version control.
- 4 Click the **Enable Version Control** button.



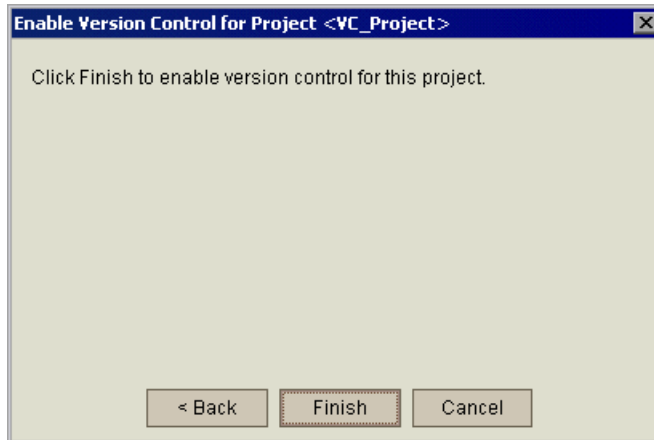
The Enable Version Control for Project dialog box opens.



5 Select a method to resume enabling version control:

- Click **Yes** to resume enabling version control from where the process was stopped.
- Click **No** to start again and create a new version control database.

Click **Next**. The following dialog box opens.



6 Click **Finish** to resume enabling version control for the project.

7 Click **OK**. Version control is enabled. TestDirector displays a lock icon next to the project name in the Projects list.



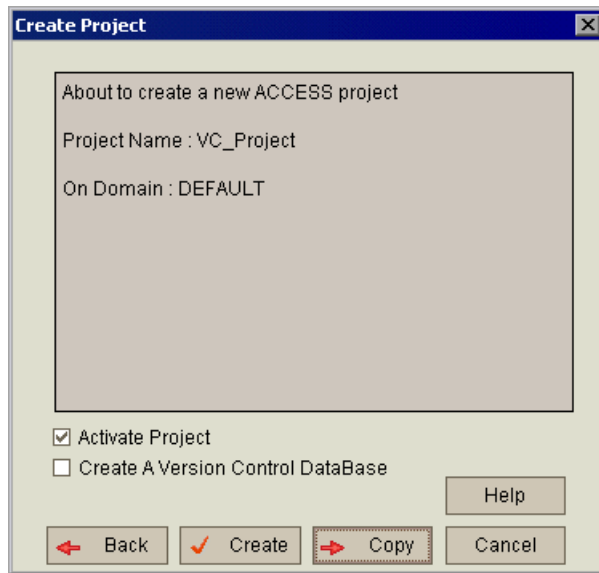
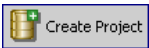
- 8 To activate the project, click the **Activate Project** button. TestDirector changes the project icon to yellow.

Creating a New Project with Version Control

When you create a new TestDirector project, you can instruct TestDirector to create a version control database for the project.

To create a new project with version control:

- 1 In the Site Administrator, click the **Projects** tab.
- 2 Click the **Create Project** button. The Create Project dialog box opens.
- 3 Enter the required information and click **Next**. The following dialog box opens.



- 4 Select **Create a Version Control Database** to instruct TestDirector to create a version control database for the project.

- 5 Click **Create** to create the new project. Alternatively, click **Copy** to copy the contents of an existing project to the new project.

TestDirector adds the project to the Projects list.



- 6 To activate the project, click the **Activate Project** button. TestDirector changes the project icon to yellow.

For more information on creating projects, refer to the *TestDirector Administrator's Guide*.

Disabling Version Control for a Project

When you disable version control for a project, TestDirector no longer stores your changes in the version control database. Note that if you enable version control for the project again, TestDirector creates a new version control database, which does not include previous history.

To disable version control for a project:

- 1 In the Site Administrator, click the **Projects** tab.
- 2 Select a project in the Projects list.
- 3 Click the **Disable Version Control** button.
- 4 If the project is active, click **Yes** to deactivate it. Click **OK** to confirm.
- 5 Click **Yes** to disable version control. Click **OK** to confirm. Version control is disabled. TestDirector removes the lock icon next to the project name in the Projects list.



- 6 To activate the project, click the **Activate Project** button. TestDirector changes the project icon to yellow.

2

Working with Version Control

Using a version control-enabled project, you can create and manage manual, WinRunner, QuickTest Professional, Astra QuickTest, or VAPI-XP tests while maintaining previous versions of each test. This helps you keep track of the changes made to each test, see how and when a test was modified, or return to a previous version of the test.

This chapter describes:

- Known Limitations
- Creating Tests under Version Control
- Checking Out Tests
- Checking In Tests
- Undoing Check Outs
- Viewing Previous Versions
- Getting Latest Test Version
- Deleting Tests
- Viewing the Test Plan Tree
- Viewing the Test Grid and Execution Grid
- Viewing Test Runs

Known Limitations

When working with version control, the following known limitations exist:

► **Execution Status is not under version control**

You cannot save the Execution Status column (TS_EXEC_STATUS) under version control.

► **QTP tests: Incorrect version number**

This limitation applies if you are working with QuickTest Professional (QTP) tests. In TestDirector, check out a QTP test. In your QTP application, open the test. Then, in TestDirector, check in the same test. In QTP, when you run this test, the test version number is updated even though the version number has not changed.

Creating Tests under Version Control

After you create a test plan tree containing the main test subjects, you are ready to create tests. The default version control number for each test is 1.1.1.

To create a test under version control:

- 1** Log in to TestDirector and select a version control-enabled project. For more information on starting TestDirector, refer to the *TestDirector User's Guide*.
- 2** Click the **Test Plan** tab.
- 3** Choose a subject folder in the test plan tree.



- 4 Click the **New Test** button or choose **Planning > New Test**. The Create New Test dialog box opens.

- 5 Select a test type from the **Test Type** list. Version control can be used with the following test types:

Test Type	Description
MANUAL	A TestDirector manual test.
WR-AUTOMATED	A test executed by WinRunner, Mercury Interactive's functional testing tool for Microsoft Windows applications.
QUICKTEST_TEST	A test executed by QuickTest Professional, Mercury Interactive's functional enterprise testing tool; or Astra QuickTest, Mercury Interactive's functional enterprise testing tool for the Web.
VAPI-XP-TEST	A test executed by Visual API-XP, TestDirector's open test architecture API testing tool.

- 6 In the **Test Name** box, type a name for the test. Note that a test name cannot include the following characters: \ / : " ? < > | * %

Note: If you are defining a test name for a QuickTest Professional or an Astra QuickTest test, the following additional characters cannot be included: + =

- 7** To keep the test checked out after it is created, select **Check Out Immediately**.
- 8** In the **Comments** box, type a brief description of the reason for the check out. Note that the **Comments** box is enabled only if the **Check Out Immediately** check box is selected.
- 9** Click **OK**. TestDirector displays the new test in the test plan tree under the subject folder you selected.
- 10** In the **Details** tab, you can view the following test details:

Option	Description
Test Name	The name of the test. (Read-only)
Locked By	The name of the user that checked out the test. (Read-only)
Current Version	The current version number of the test. (Read-only)
Creation Date	The date on which the test was created. By default, the current date is displayed. If the test is checked out, you can click the down arrow to display a calendar and select a different creation date.
Designer	The person who designed the test. By default, TestDirector displays the login user name. If the test is checked out, you can click the down arrow to select a different user name.
Status	The current status of the test. The default status is Design. If the test is checked out, you can click the down arrow to select a different status from the list.
Description	Describes the test. If the test is checked out, you can modify the description.

- 11** Click the **Design Steps** tab to define steps for the test. Note that in order to define steps, the test must be checked out. For more information on checking out tests, see “Checking Out Tests,” on page 15. For more information on defining test steps, refer to the *TestDirector User’s Guide*.

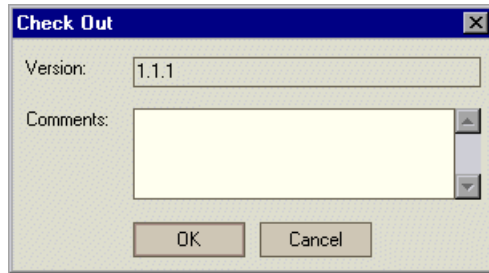
- 12** Click the **Attachments** tab to add an attachment to the new test if necessary. Note that in order to add an attachment, the test must be checked out. For more information on checking out tests, see “Checking Out Tests,” on page 15. For more information on adding attachments, refer to the *TestDirector User's Guide*.
- 13** Click the **Reqs Coverage** tab to define requirements coverage. For more information on defining requirements, refer to the *TestDirector User's Guide*.

Checking Out Tests

Checking out a test from the version control project lets you work exclusively on that version of the test. When you check out a test, the test is locked. This prevents other users of the project from overwriting any changes you make to the test. When you finish working on the test, you check it back into the project. The test version is now available to the other users of the project.

To check out a test:

- 1** In the Test Plan module, select a test in the test plan tree.
- 2** Choose **Versions > Check Out**, or right-click the test and choose **Versions > Check Out**. The Check Out dialog box opens.



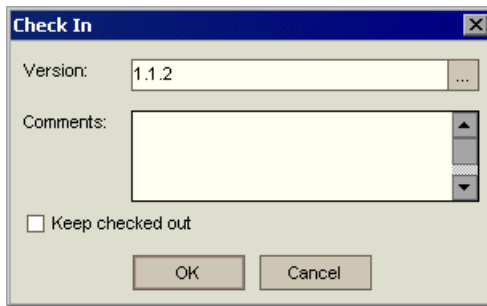
- 3** In the **Comments** box, type a brief description of the reason for the check out.
- 4** Click **OK**.

Checking In Tests

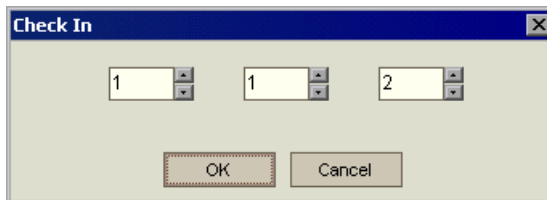
You check in a test version when you want to update your test and store your changes. Each time you check in a test, a new version of the test is created. When the test version is checked in, the test is unlocked and is available to other project users.

To check in a test:

- 1 In the Test Plan module, select a test in the test plan tree.
- 2 Choose **Versions > Check In**, or right-click the test and choose **Versions > Check In**. The Check In dialog box opens.



- 3 To modify the **Version**, click the browse button. The Check In dialog box opens.



Modify the version number and click **OK** to close the dialog box.

- 4 In the **Comments** box, type a brief description explaining the changes that were made to this version.
- 5 To update your test and store your changes while keeping the test checked out, select **Keep checked out**.
- 6 Click **OK**.

Undoing Check Outs

When a test is checked out, you can undo your checkout and cancel your changes. The test returns to the way it was before you checked it out.

To undo a checkout:

- 1** In the Test Plan module, select a test in the test plan tree.
- 2** Choose **Versions > Undo Check Out**, or right-click the test and choose **Versions > Undo Check Out**.
- 3** Click **Yes** to confirm.

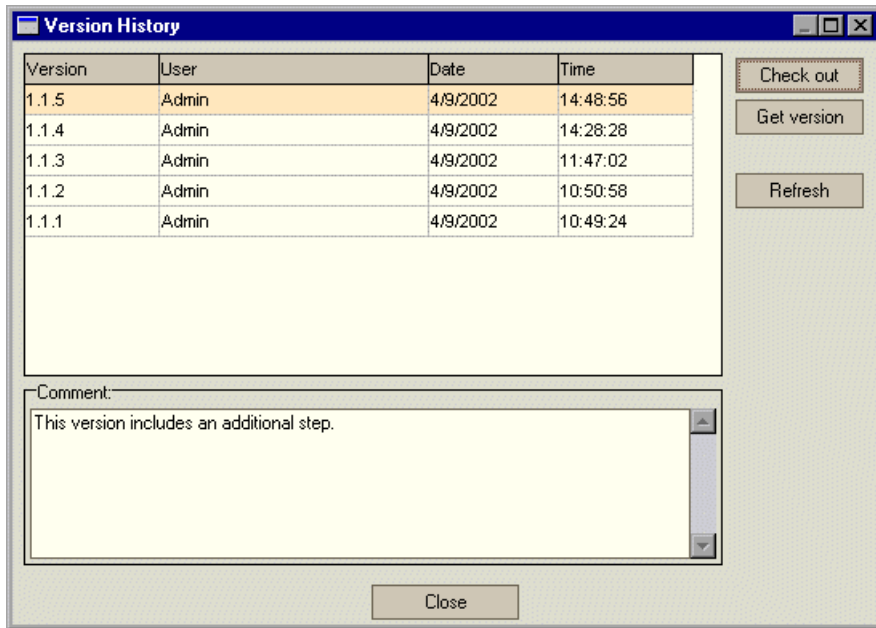
Viewing Previous Versions

You can view and display the history for a selected test, including all the test versions, the user who created each version, and the date and time that each version was created.

To view a previous version:

- 1** In the Test Plan module, select a test in the test plan tree.

- 2 Choose **Versions > Versions**, or right-click the test and choose **Versions > Versions**. The Version History dialog box opens.



- 3 If your selected test is checked in, the following options are available:

Option	Description
Check out	Enables you to check out a test version. For more information, see "Checking Out Tests," on page 15.
Get version	Gets a copy of a test version and displays it in view mode (read-only).
Refresh	Refreshes the list of test versions displayed in the Version History dialog box.

4 If your selected test is checked out, you also have the following options:

Option	Description
Undo Checkout	When a test is checked out, you can undo your checkout and cancel your changes. For more information, see “Undoing Check Outs,” on page 17.
Check In	Enables you to check in a test version. For more information, see “Checking In Tests,” on page 16.

Getting Latest Test Version

If you are viewing a test version using the **Get version** command (see “Viewing Previous Versions,” on page 17), you can switch back to the latest test version.


To get the latest test version:

- 1 In the Test Plan module, select a test in the test plan tree.
- 2 Choose **Versions > Get Latest Version**, or right-click the test and choose **Versions > Get Latest Version**. The latest test version is displayed in the test plan tree.

Deleting Tests

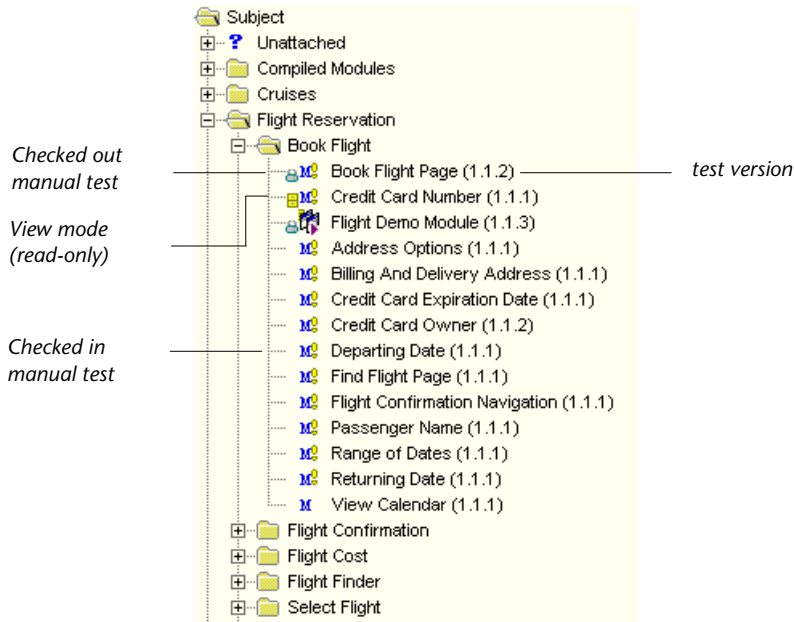
You can delete a test in the test plan tree. When you delete a test, TestDirector deletes it permanently from the project and the version control database, and it cannot be recovered.

To delete a test:

- 1 Select a test from the test plan tree.
- 2  Click the **Delete** button or choose **Planning > Delete**. Alternatively, right-click the test and choose **Delete**.
- 3 Click **Yes** to confirm.

Viewing the Test Plan Tree

In the Test Plan module, when you use version control, the test plan tree displays the test version number next to each test, and indicates whether a test is checked in or out. It also indicates when a test version is displayed in view mode only.



To display or hide the test version number next to each test:

In the Test Plan module, choose **View > Versions**.

Viewing the Test Grid and Execution Grid

In the Test Grid and Execution Grid, when you use version control, TestDirector displays three additional columns with version control information about a test:

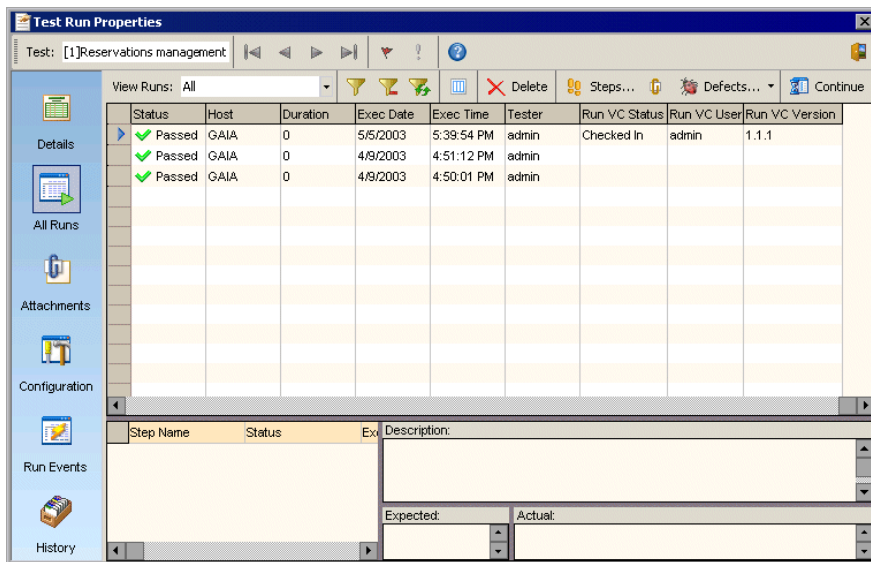
- ▶ **Vc Locked By** indicates the name of the user who checked out the test.
- ▶ **Vc Status** indicates the test status (**Checked Out**, **Checked In**, or **Read Only**).
- ▶ **Vc Version** indicates the version number of the test.

Test Name	Type	Creation Date	Description	Designer	Execution Sta	Status	Vc Locked By	Vc Status	Vc Version
Airline Preferen	WFR-AUTOMATED	04/21/2002	Shows the follow	admin	No Run	Design	admin	Checked Out	1.1.2
Credit Card Nurr	MANUAL	04/21/2002		admin	No Run	Design		Read Only	1.1.2
Book Flight Page	MANUAL	04/21/2002	Shows the follow	admin	No Run	Design	admin	Checked Out	1.1.3
Flight Demo Moc	WFR-AUTOMATED	04/21/2002	Shows the follow	admin	No Run	Design	admin	Checked Out	1.1.1
Travel	MANUAL	04/21/2002		admin	No Run	Design		Checked In	1.1.2

Viewing Test Runs

In the Test Run Properties dialog box, when you use version control, TestDirector displays three additional columns with version control information about a test that has run:

- ▶ **Run VC User** indicates the name of the user who checked out the test.
- ▶ **Run VC Status** indicates the test status (**Checked Out**, **Checked In**, or **Read Only**).
- ▶ **Run VC Version** indicates the version number of the test.





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