Oracle® Test Manager

Test Manager User's Guide

Release 13.2.0.1

E15486-19

October 2017

ORACLE®

Oracle Test Manager Test Manager User's Guide, Release 13.2.0.1

E15486-19

Primary Author: Rick Santos

Contributing Author: Mary Anna Brown

Contents

3 Working With Projects

4 Working With Test Plans

5 Working With Requirements

6 Working With Tests

7   Executing Tests

8   Working With Issues

A Oracle Test Manager API Reference

Index

Preface

Welcome to the Oracle Test Manager User Guide. This guide explains how to use Oracle Test Manager and the Administrator to organize and manage your overall Web testing process.

Audience

This guide is for developers, administrators, managers, QA engineers, and testers who will be using Oracle Test Manager to track requirements, tests, and issues for testing projects.

This guide is for the following users:

- Developers who create and debug applications.

- Administrators who setup and manage the database, users, and user roles.

- QA engineers and testers who test and track issues found.

- Project managers who define product or project requirements.

- Managers who review reports on development progress.

Prerequisites

Although no specific technical knowledge is required, some knowledge of test management and defect tracking is assumed. Administrators should be familiar with the concepts of user roles and database administration and management.

Using This Guide

This guide is organized as follows:

Chapter 1, "Introduction" provides an overview of Oracle Test Manager.

Chapter 2, "Basics" explains how to install Oracle Test Manager and describes the main window.

Chapter 3, "Working With Projects" describes how to create and manage projects.

Chapter 4, "Working With Test Plans" explains how to create and maintain test plans.

Chapter 5, "Working With Requirements" explains how to create and maintain requirements.

Chapter 6, "Working With Tests" explains how to create and maintain tests.

Chapter 7, "Executing Tests" explains how to create test sets add tests to test sets and run tests.

Chapter 8, "Working With Issues" explains how to create and maintain issues.

Chapter 9, "Working With Reports" explains how use the Reports and Dashboard tabs to view, customize, email, and export reports.

Chapter 10, "Configuring Databases" explains how to add, remove, and update databases to Oracle Test Manager.

Chapter 11, "Administering the Database" explains how to use the Administrator to maintain project preferences, users, permissions, and project components.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Application Testing Suite documentation set:

- *Oracle Application Testing Suite Release Notes*
- *Oracle Application Testing Suite Installation Guide*
- *Oracle Application Testing Suite Security Guide*
- *Oracle Application Testing Suite Getting Started Guide*
- *Oracle Functional Testing OpenScript User's Guide*
- *Oracle Functional Testing OpenScript Programmer's References*
- *Oracle Load Testing Load Testing User's Guide*
- *Oracle Test Manager Test Manager User's Guide*

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction

Oracle Test Manager is an easy to use tool that allows you to organize and manage your overall testing process. It provides a single unified platform for sharing information among team members that is integrated with test solutions. You can manage both manual and automated tests

Oracle Test Manager lets you create projects that group together and organize test scripts, requirements that need to be tested, and issues resulting from the tests. Once created, you can indicate the relationships among these items, allowing you to quickly and easily find all information pertaining to a particular test script, requirement, or issue.

The Oracle Test Manager Web interface lets you access the database remotely without having to install software onto your computer.

1.1 Feature Highlights

Oracle Test Manager offers the following features and advantages for integrated requirements management and defect tracking for both manual and automated tests:

Requirements Management - provides the ability to define and manage requirements for a specific project. You can specify details for each requirement, track the status of each requirement, and associate requirements with test cases to ensure testing coverage.

Test Planning and Management - provides the ability to define and manage a test plan that incorporates both manual and automated test cases. You can store Oracle Application Testing Suite scripts in the database, automatically execute scripts in Oracle OpenScript from the test plan interface, and automatically store the test results. You can also associate requirements to test cases to ensure testing coverage, and associate test cases with issues so they can be reproduced and to keep track of how the issues were identified.

Test Execution - provides the ability to create test sets, specify which tests to run and execute tests either manually or at a scheduled date and time.

Defect Tracking - provides the ability to create and manage defects, referred to as issues, for a specific project. You can associate test cases with issues so they can be reproduced and to keep track of how the issues were identified.

Integration with Oracle Application Testing Suite - seamlessly integrates with Oracle Application Testing Suite test solutions, providing the ability to automatically launch and execute Oracle OpenScript scripts for functional and regression testing as well as retrieve and archive the results. You can also launch third party products.

Reporting - generates reports in standard HTML format for managing the overall testing process. You can report on requirements, tests, and issues.

Administration - provides an administration tool for entering and managing user accounts, project permissions, and general tool preferences. The Oracle Test Manager Administrator provides options for configuring LDAP authentication providing users a single-sign on solution. See Section 11.5, "Implementing LDAP User Authentication" for additional information about configuring and using LDAP authentication.

Custom Fields - provides the ability to add custom fields to the database for recording data specific to your projects.

Database Repository - provides the ability to store test assets including test scripts, results, attachments, requirements, test plans, and defects in a common database.

1.1.1 Popup Blockers

Popup blockers must be turned off for Oracle Test Manager to operate. To turn off popup blockers:

Firefox - Select **Options** from the **Tools** menu. Uncheck Block Popup Windows.

Internet Explorer - Select **Pop-up Blocker** from the **Tools** menu. If the pop-up blocker is on, select **Turn Off Pop-up Blocker**.

2

Basics

This chapter explains how to install and start Oracle Test Manager. It also describes the Oracle Test Manager windows, their features, and their menu options.

Oracle Test Manager allows you to do the following:

- define and manage test plans that incorporate both manual and automated test cases.

- define and manage requirements and issues for a specific project.

- automatically launch and execute Oracle OpenScript scripts for both functional and regression testing, then retrieve and archive the results.

- associate requirements, test plans, test cases, test sets, and issues within a specific project.

- store attachments and view them by launching third party products.

- store all test assets including test scripts, results, attachments. requirements, and issues in a common database.

- generate reports for managing the overall test process.

- manage user accounts, their permissions and set tool preferences using the Oracle Test Manager Administrator tool.

2.1 Installing and Starting Oracle Test Manager

To install Oracle Test Manager:

1. Go to:
   http://www.oracle.com/technology/software/products/app-testing/index.html.

2. Download the Oracle Application Testing Suite product from the Oracle Web site and save it to a temporary directory on your hard disk. See the *Oracle Application Testing Suite Installation Guide* for additional information about the product zip files.

3. Unzip the download Zip file and run setup.bat.

4. Follow the setup instructions to install the Oracle Application Testing Suite.

   > **Note:** A product establishes its Default Repository in $installDir/OFT, where $installDir is the directory where Oracle Application Testing Suite is installed or, if Oracle Application Testing Suite is not installed, where OpenScript is installed.

During the Oracle Application Testing Suite installation, you will be required to enter a master password to be used with Oracle Application Testing Suite products. *Remember this password.* It will be required to log in to the Administrator, Oracle Load Testing, and Oracle Test Manager.

5. For Windows installations, select **Oracle Test Manager** from the Oracle Application Testing Suite **Start** menu or enter `http://<machine>:8088/otm` or `http://localhost:8088/otm` in your browser where `<machine>` is the name of the machine where the Oracle Application Testing Suite is installed.

   For Linux installations, enter `http://<machine>:8088/otm` or `http://localhost:8088/otm` in your browser where `<machine>` is the name of the machine where the Oracle Application Testing Suite is installed.

   Two default administrator accounts are created at installation. The usernames for the default accounts are **administrator** and **default**. The default password for both the **administrator** and **default** accounts is the master password specified during the Oracle Application Testing Suite installation process. Use the Oracle Application Testing suite Administrator to customize the Oracle Test Manager database by creating user accounts, assigning user names and passwords, and assigning the type of access that they have in Oracle Test Manager. See Chapter 11, "Administering the Database" for additional information about using the Oracle Application Testing Suite Administrator.

   Use the Oracle Application Testing Suite Database Configuration utility to configure database connections to Oracle Load Testing databases. On Windows machines, you can access the Database Configuration utility from the **Tools** sub menu of the Oracle Application Testing Suite **Start** menu. On Linux machines, you can access the Database Configuration utility from `<oats_install>/bin/DbConfig.sh`.

2.1.1 Running Tests on Remote Systems

When you run a test, you can specify the workstation to run it on. Workstations are configured using the Systems Manager. To run Oracle OpenScript tests on remote systems, you must also install the Oracle Application Testing Suite Remote Agent on the remote system and configure Remote Agent Service login credentials. See the "Installing the Oracle Load Testing Remote Agent" section in the *Oracle Application Testing Suite Installation Guide* for additional information about installing the agent and configuring the login credentials.

2.2 Oracle Application Testing Suite Tools Menu

The Oracle Application Testing Suite tools menu has options for viewing version information, restarting and stopping the Oracle Application Testing Suite Application service, and creating support files for troubleshooting. Select **Tools** from the Oracle Application Testing Suite start menu. This menu has the following options:

About Oracle Application Testing Suite - displays the About Oracle Application Testing Suite dialog box that shows copyright and version information. It also has information about your system.

Create Support Package - for troubleshooting purposes, creates the OATSSupport.zip file and places it on your desktop. From there you can email it to your support representative. This file contains the log files used for troubleshooting. On Linux machines, use `<oats_install>/bin/oats_support.sh` to create support packages.

Oracle Application Testing Database Configuration - opens the database configuration utility for adding or removing database connections for Oracle Load Testing and Oracle Test Manger. On Linux machines, use `<oats_install>`/bin/DbConfig.sh to start the database configuration utility.

Oracle Load Testing Agent Authentication Manager - opens the Agent Authentication Manager for defining authentication profiles for multiple load testing agent machines. On Linux machines, use `<oats_install>`/jdk/jre/bin/java -jar `<oats_install>`/agentmanager/AMAuthManager.jar to start the Agent Authentication Manager.

Restart Oracle Application Testing Suite Application Service - stops and restarts the Oracle Application Testing Suite Application service. On Linux machines, use `<oats_install>`/bin/restartSvc.sh [OracleATSServer|OracleATSAgent] to restart the service.

Stop Oracle Application Testing Suite Application Service - stops the Oracle Application Testing Suite Application Service. On Linux machines, use `<oats_install>`/bin/stopSvc.sh [OracleATSServer|OracleATSAgent] to stop the service.

2.3 Changing the Web Server Port

The default Oracle Test Manager web server port is 8088. You can change this to another port. The port number must be changed in the WebLogic Console and the Oracle Application Testing Suite configuration.

To change the port in the WebLogic Console:

1. Go to `http://localhost:8088/console` to start the Oracle WebLogic Server Administration Console.

2. Log in as an administrator (the default username is "oats") using the password you defined during the Oracle Application Testing Suite installation procedure.

3. In the Domain Structure, select Environment under "oats" and then select Servers.

4. Select AdminServer(Admin).

5. Change the port and release the configuration.

6. In `<oats-home>`/config/oats-config.xml update http, admin, and cluster URLs with appropriate port specifications.

7. Open the Registry Editor (regedit) and navigate to:

   `HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\services\OracleATSServer\Parameters`

8. Change the `Port` value to the new Port number and close the Registry Editor.

9. Restart the ATS service and login to Oracle Load Testing or Oracle Test Manager.

   See the Oracle WebLogic Server Administration Console documentation for additional information about using the Console application.

2.4 Using SSL

You can set up Oracle Test Manager to use SSL (Secure Sockets Layer). The procedure is comprised of the following steps:

1. Go to `http://localhost:8088/console` to start the Oracle WebLogic Console.

2. Log in as administrator using the password you defined during the Oracle Application Testing suite installation procedure.

3. In the Domain Structure, select Environment under "oats" and then select Servers.

4. Select AdminServer(Admin).

5. Select the SSL tab.

See the Oracle WebLogic Server documentation for additional information about using the Console application.

2.5 Setting Up the Web Server

To set up the Web Server:

1. Install Oracle Test Manager on the server machine as described previously.

2. Use Oracle Test Manager Administrator, configure users, projects, and custom fields as necessary.

3. Select **Oracle Application Testing Suite** from the **Start** menu and then select **Oracle Application Testing Suite Database Configuration** from the **Tools** menu to configure the database name.

4. Start the Oracle Test Manager web server on the server machine by selecting **Control Panel** from the **Start** menu and then selecting **Services** from the Control Panel Administrative Tools.

5. Select Oracle Test Manager web-server.

6. Click **Start** from the **Action** menu.

7. You can set up web server so it will start when you start your machine. Select **Properties** from the **Action** menu.

8. Click the **Recovery** tab.

9. Select **Restart the Service** in the First failure field.

2.6 Logging In

To log in:

1. Select **Programs** from the **Start** menu and then select **Oracle Test Manager - Web** from the **Oracle Application Testing Suite** menu.

2. Enter your user name and the password as set by the installation procedure or your System Administrator.

3. Select the database you want to access.

4. Click Login.

2.7 Test Plan Tab

The Test Plan tab lets you work with test plans.

The number of test plans displayed is determined by the Maximum Tree Nodes setting in options. You can:

- Expand and collapse the tree view by clicking on the plus and minus signs.

- View the next or previous group of test plans by clicking the **Next** or **Previous** button.

- Move test plans by dragging and dropping them into their new locations.

The right pane lists the selected test plan's details. In the upper right corner, associated requirements are listed as well as attachments and links. You can:

- Click **Edit this Test Plan Node** to open the Edit Test Plans dialog box.

- Click **Print** to print the right pane.

- Click **e-Mail** to e-mail the test plan. The title and description are automatically copied to the e-mail.

- Click on an associated requirement to view its details.

- Click on an attachment to open it in the appropriate application.

- Click on a link to view the URL in a separate browser window.

- Select **Add/Edit** to add or edit attachments, links, or associated items.

2.7.1 Right-Click Menu

The right-click menu is displayed when you right-click a test plan in the left pane. It has the following options:

Add Test Plan Node - displays the Add Test Plan Node dialog box.

Edit Test Plan Node - displays the Edit Test Plan Node dialog box for the selected item.

Multi Edit Test Plans - displays the Edit Test Plan Nodes dialog box for the selected items. Use Shift-click to select sequential items in the tree. Use Ctrl-click to select non-sequential items in the tree.

Rename Test Plan - opens a dialog box for specifying a new name for the test plan. The test plan name will be changed in all places where the test plan is used.

Delete Test Plan Node - deletes the selected item.

Copy - copies the selected item to the clipboard.

Paste - pastes the contents of the clipboard to the left pane.

Associate Requirements - displays the Associate Requirements dialog box.

Associate Test Sets - displays the Associate Test Sets dialog box.

Attachments - displays the Attach files dialog box.

2.8 Requirements Tab

The requirements tab lets you work with requirements.

The number of requirements displayed is determined by the number you enter in the Maximum Tree Nodes field in options. You can:

- Expand and collapse the tree view by clicking on the plus and minus signs.

- View the next or previous group of requirements by clicking the **Next** or **Previous** button.

- Hold the mouse over a node to view a count of its child nodes.

- Move requirements by selecting a requirement and using the move buttons.

- Search requirements by clicking the **Find** button.

- Sort requirements by clicking **Sort**.

- Group requirements by clicking **Group**.

- Filter requirements by clicking **Filter**.

- Display a particular requirement by entering the requirement number in to **Goto** field and clicking the Goto button.

The color of the icon in front of the requirement indicates its priority. The default colors are as follows and can be changed by changing the order of the Requirement Priorities in the Administrator.

- Red, high priority

- Yellow, medium priority

- Green, low priority

The right pane lists the selected requirement's details. In the upper right corner, associated tests and issues are listed as well as attachments and links. You can:

- Click **Edit this requirement** to open the Edit Requirement dialog box.

- Click **Print** to print the right pane.

- Click **e-Mail** to e-mail the requirement. The title and description are automatically copied to the e-mail.

- Click on an associated test or issue to view its details.

- Click on an attachment to open it in the appropriate application.

- Click on a link to view the URL in a separate browser window.

- Select **Add/Edit** to add or edit attachments, links, or associated items.

2.8.1 Right-Click Menu

The right-click menu is displayed when you right-click a requirement in the left pane. It has the following options:

Add Requirement - displays the Add Requirement dialog box.

Edit Requirement - displays the Edit Requirement dialog box for the selected item.

Multi Edit Requirements - displays the Edit Requirements dialog box for the selected items. Use Shift-click to select sequential items in the tree. Use Ctrl-click to select non-sequential items in the tree.

Rename Requirement - opens a dialog box for specifying a new name for the requirement. The requirement name will be changed in all places where the requirement is used.

Delete Requirement - deletes the selected item.

Copy - copies the selected item to the clipboard.

Paste - pastes the contents of the clipboard to the left pane.

Associate Tests - displays the Associate Test dialog box.

Associate Test Plans - displays the Associate Test dialog box.

Attachments - displays the Attach Files dialog box.

Group - displays the Group Requirements dialog box for selecting how to sort items in the left pane.

2.9 Tests Tab

The tests tab lets you work with tests.

The number of tests displayed is determined by the Maximum Tree Nodes setting in options. You can:

- Expand and collapse the tree view using the plus and minus signs.

- View the next or previous group of tests by clicking the **Next** or **Previous** button.

- Hold the mouse over a node to view a count of its child nodes.

- Move tests by selecting the test and using the **Move** buttons.

- Search tests by clicking the **Find** button.

- Sort tests by clicking **Sort**.

- Group tests by clicking the **Group** button.

- Filter tests by clicking the **Filter** button.

- Schedule when to run tests by clicking the **Schedule** button.

- Display a particular requirement by entering the requirement number in to **Goto** field and clicking the Goto button.

The icon in front of the test indicates the type of test as follows:

- Oracle OpenScript script - blue with a spiral.

- Manual test - blue with a pencil.

- Test folder - blue with a spiral.

- 3rd Party test - blue with two stars

- JUnit test - blue with the letter J.

The right pane lists the selected test's details. Test steps and run history are displayed. You can:

- Click **Run Test** to start the Run Manual Test wizard or run an Oracle OpenScript test.

- Click **Edit Test** to open the Edit Test dialog box.

- Click **Print** to print the right pane.

- Click **e-Mail** to e-mail the test. The title and description are automatically copied to the e-mail.

- Click **Delete Results** to display the Delete Results dialog box for deleting results from particular test runs.

- Click the date in the **Run History** section to display result details for a particular run. The Test Set Run History is only included if the **Include Test Set Runs in Tests Tab** option is selected in the **Right Hand Pane Display** section of the user options (select **Options** from the **Tools** menu). The **Run History** section uses the following icons to indicate the results for test runs either as a quick run or as part of a test set:

  Passed icon - green circle with check mark.

  Warning icon - yellow circle with dash mark.

  Failed icon - red circle with exclamation mark.

Running icon - blue circle with dash mark.

In Progress icon - blue circle with dash mark.

Skipped icon - blue circle with dash mark.

In the upper right corner or the right pane, associated requirements and issues are listed as well as attachments and links. You can:

- Click on an associated requirement or issue to view its details.

- Click on an attachment to open it in the appropriate application.

- Click on a link to view the URL in a separate browser window.

- Select **Add/Edit** to add or edit attachments, links, or associated items.

2.9.1 Right-Click Menu

The right-click menu is displayed when you right-click a test in the left pane. It has the following options:

Add Test - displays the Add Test dialog box.

Add Test as child - displays the Edit Test dialog box for adding a test as a child of the currently selected node.

Edit Test - displays the Edit Test dialog box for the selected item.

Multi Edit Tests - displays the Edit Test dialog box for the selected items. Use Shift-click to select sequential items in the tree. Use Ctrl-click to select non-sequential items in the tree.

Rename Test - opens a dialog box for specifying a new name for the test. The test name will be changed in all places where the test is used.

Delete Test - deletes the selected item.

Copy - copies the selected item to the clipboard.

Paste - pastes the contents of the clipboard to the left pane.

Paste as child - pastes the contents of the clipboard to the left pane as a child node of the currently selected node.

Associate Requirements - displays the Associate Requirement dialog box.

Associate Issues - displays the Associate Issue dialog box.

Attachments - displays the Attach files dialog box.

Run Test - runs the selected test.

Schedule Test - displays the New Schedule and Add Task dialog boxes for creating a schedule. The selected test is automatically added to the tests list.

Set Test Result - displays the Set Test Result dialog box for setting the test result for the selected tests to passed, failed, or warning.

Group - displays the Group Tests dialog box for selecting how to sort items in the left pane.

2.10 Test Execution Tab

The test execution tab lets you work with test sets to run tests.

The number of test sets displayed is determined by the Maximum Tree Nodes setting in options. You can:

- Expand and collapse the tree view using the plus and minus signs.

- View the next or previous group of test sets by clicking the **Next** or **Previous** button.

- Hold the mouse over a node to view a count of its child nodes.

- Move test sets by selecting the test and using the **Move** buttons.

- Search test sets by clicking the **Find** button.

- Sort test sets by clicking **Sort**.

- Filter test sets by clicking the **Filter** button.

- Schedule when to run test sets by clicking the **Schedule** button.

- View the current status of the test set (passed, warning, failed) and the progress of a test set.

The icon in front of the test indicates the type of test as follows:

- Oracle OpenScript script - blue with a spiral.

- Manual test - blue with a pencil.

- Test folder - blue with a spiral.

- Test set - blue with a plus sign.

- 3rd Party test - blue with two stars

- JUnit test - blue with the letter J.

The color of the icon in front of the test indicates the last result from running the test, as follows:

- Green, passed

- Red, failed

- Yellow, warning

- Blue, not run

- Light Blue, skipped

- Silver, currently running

The right pane lists the selected test set's details. Test steps and run history are displayed. You can:

- Click **Create Run** to create a test run for all tests added to the test set. This option is available at the top of the Test Set page only after tests have been added to a Test Set. Click the **Add/Edit** link in the Test List to add tests to a Test Set. When you create a test run, a run entry is added to the **Run** list in the Test List and a new entry is added to the Run History list.

- Click **Edit Test Run** to open the Edit Test Set dialog box. If you add tests to a Test Set after you have created a Test Run, you must create a new Test Run for the new tests to be included in the new Test Run. However, you can add and remove existing tests from an existing Test Run using the **Add/Remove Tests to this run** option in the Test List of the existing Test Run. See Section 7.9.3.1, "Adding and Removing Tests in a Test Set Run" for additional information.

- Click **Print** to print the right pane.

- Click **e-Mail** to e-mail the test. The title and description are automatically copied to the e-mail.

- The **Details** section shows the Test Set creation, type, and owner information. Click Expand or Collapse to show or hide the Details section.

- The **Test List** section shows the tests in the Test Set with run status, owner, and executed by information. Click Expand or Collapse to show or hide the Test List section. Click the **Add/Edit** link in the Test List to add tests to a Test Set. If you add tests to a Test Set after you have created a Test Run, you must create a new Test Run for the new tests to be included in the new Test Run. However, you can add and remove existing tests from an existing Test Run using the **Add/Remove Tests to this run** option in the Test List of the existing Test Run. See Section 7.9.3.1, "Adding and Removing Tests in a Test Set Run" for additional information. Click **Create Run** to create a test run, then click **Launch** on the **Actions** menu to run the Test Set.

  Manual tests are launched individually using the run link in the Test List. Click **Set Result** on the **Actions** menu to manually set or override test results for a test run.

- The **Run History** section shows the Test Set run history and status information. Click Expand or Collapse to show or hide the Run History section. Click the date in the **Run History** section to display result details for a particular run. Click **Delete Results** to display the Delete Results dialog box for deleting results from particular test runs.

  The **Run History** section uses the following icons to indicate the results for test set runs:

  Passed icon - green circle with check mark.

  Warning icon - yellow circle with dash mark.

  Failed icon - red circle with exclamation mark.

  Skipped icon - blue circle with dash mark.

  Incomplete icon - white circle with clock hands.

  Unknown icon (when status is a custom status) - light blue circle with question mark.

  The **Test Set Run Details** window uses the following icons to indicate the results for tests run within a test set run:

  Passed icon - green circle with check mark.

  Warning icon - yellow circle with dash mark.

  Failed icon - red circle with exclamation mark.

  Running icon - blue circle with dash mark.

  In Progress icon - blue circle with dash mark.

  Skipped icon - blue circle with dash mark.

  Not Run icon - blue circle with dash mark.

In the upper right corner or the right pane, associated requirements and issues are listed as well as attachments and links. You can:

- Click on an associated requirement or issue to view its details.

- Click on an attachment to open it in the appropriate application.

- Click on a link to view the URL in a separate browser window.

■ Select **Add/Edit** to add or edit attachments, links, or associated items.

2.10.1 Right-Click Menu

The right-click menu is displayed when you right-click a test in the left pane. It has the following options:

Add Test Set Node - displays the Add Test dialog box.

Edit Test Set Node - displays the Edit Test dialog box for the selected item.

Multi Edit Test Sets - displays the Edit Test dialog box for the selected items. Use Shift-click to select sequential items in the tree. Use Ctrl-click to select non-sequential items in the tree.

Rename Test Set - opens a dialog box for specifying a new name for the Test Set. The Test Set name will be changed in all places where the Test Set is used.

Delete Test Set Node - deletes the selected item.

Copy - copies the selected item to the clipboard.

Paste - pastes the contents of the clipboard to the left pane.

Associate Requirements - displays the Associate Requirement dialog box.

Associate Issues - displays the Associate Issue dialog box.

Associate Test Plans - displays the Associate Test Plans dialog box.

Attachments - displays the Attach files dialog box.

Run Test Set - runs the selected test set.

Schedule Test Set - displays the New Schedule and Add Task dialog boxes for creating a schedule. The selected test is automatically added to the tests list.

2.10.2 The Agent Queue

When executing OpenScript tests, Oracle Test Manager checks if the requested agent system is available. If the agent system is available, the test will be scheduled to run immediately. If the agent system is not available the test is added to the agent queue until the agent system resource is available. Any test or testset scheduled to run at a specific time will be put into the queue when the scheduled time comes. This means that if a test or testset was scheduled for execution at 1pm, it will be added to the queue at 1pm. If other tests are also in the queue, the test or testset scheduled for 1pm may have to wait until resources become available before execution actually begins.

The agent queue handles situations when multiple (2 or more) testers execute OpenScript tests using the same Oracle Test Manger agent system. If a tester requests to use the same system that is executing a test started by another tester, the new test waits in the agent queue while the Oracle Test Manager agent system is not available. The new test will be scheduled to run when the agent system resource becomes available. You can check the status of the agent queue using the **Queue** toolbar button on the Toolbar of the Test or Test Execution tabs.

2.11 Issues Tab

The issues tab lets you work with issues.

The number of issues displayed is determined by the Maximum Tree Nodes setting in options. You can:

- View the next or previous group of issues by clicking the **Next** or **Previous** button.

- Sort issues by clicking **Sort**.

- Group issues by clicking the **Group** button.

- Filter issues by clicking the **Filter** button.

- Hold the mouse over a node to view a count of its child nodes.

- Search issues by clicking the **Find** button.

- Display a particular issue by entering the issue number in the **Goto** field and clicking the **Goto** button.

The color of the icon in front of the issue indicates its priority. The default colors are as follows and can be changed by changing the order of the Issue Priorities in Oracle Test Manager Administrator:

- Red, high priority

- Yellow, medium priority

- Green, low priority

The number inside the icon corresponds to the status number.

The right pane lists information about the selected issue including the issue's details, solution, priority, and status. You can:

- Click **Edit this issue** to open the Edit Issue dialog box.

- Click **Print** to print the right pane.

- Click **e-Mail** to e-mail the issue. The title and description are automatically copied to the e-mail.

In the upper right corner of the right pane, associated requirements, tests, and issues are listed as well as attachments and links. You can:

- Click on an associated test, requirement, or issue to view its details.

- Click on an attachment to open it in the appropriate application.

- Click on a link to view the URL in a separate browser window.

- Select **Add/Edit** to add or edit attachments or links.

2.11.1 Right-Click Menu

The right-click menu is displayed when you right-click an issue in the left pane. It has the following options:

Add Issue - displays the Add Issue dialog box.

Edit Issue - displays the Edit Issue dialog box for the selected item.

Rename Issue - opens a dialog box for specifying a new name for the issue. The issue name will be changed in all places where the issue is used.

Multi Edit Issues - displays the Edit Issue dialog box for the selected items. Use Shift-click to select sequential items in the tree. Use Ctrl-click to select non-sequential items in the tree.

Delete Issue - deletes the selected item.

Copy - copies the selected item to the clipboard.

Paste - pastes the contents of the clipboard to the left pane.

Associate Tests - displays the Associate Test dialog box.

Associate Issues - displays the Associate Issue dialog box.

Attachments - displays the Attach files dialog box.

Group - displays the Group Issues dialog box for selecting how to sort items in the left pane.

2.12 Reports Tab

The Reports tab lets you work with both standard and custom reports.

Oracle Test Manager comes with a standard set of reports that can be viewed as either a graphic or as data. In addition, you can create custom reports to display only the data that you are interested in. You can:

- View a standard or custom report by selecting it from the left tree.
- Add a custom report by clicking **Add**.
- Edit a custom report by clicking **Edit**.
- Delete a custom report by clicking **Delete**.
- Clone an existing report to create a copy of it that you can then edit by clicking **Clone**.
- Save custom reports by clicking **Save**.
- Email reports by clicking **Email**.
- Print reports by clicking **Print**.
- **Filter** the fields in the report to display only the data in which you are interested.
- Export reports to jpg, and xls formats.

Refer to Chapter 9, "Working With Reports" for instructions on using reports.

2.13 Dashboard Tab

The Dashboard tab lets you view an overview of reports.

One Dashboard reports is available for requirements, tests, and issues. You can customize which reports are displayed for each and then save the view. In addition, you can select the number of columns to use for the display.

You can:

- Add reports to the view by clicking **Add**.
- Remove the selected dashboard report by clicking **Delete**.
- Save the customized view by clicking **Save**.
- Print dashboard reports by clicking **Print**.
- Toggle the display of the report tree by clicking **Toggle.**

Each report has the following toolbar with the following options, described from left to right.

Move Left - moves the report one space to the left.

Move Up - moves the report up one space.

Move Down - moves the report down one space.

Move Right - moves the report one space to the right.

Minimize - minimizes the report.

Maximize - displays the report in a separate window. From there you can toggle between report and data views, and export the report.

Delete - removes the report from the display.

2.14 Menu Options

This section lists the Oracle Test Manager menus and options.

2.14.1 Project Menu

The Project menu lets you select which project to open.

Open - displays the Open Project dialog box for selecting the project you want to open.

Import Data - displays the Import dialog box for importing a .csv, .xls or Project .zip file into the database.

Export Project - displays the Export dialog box for exporting data from the database to an .xml file. The exported .xml file is saved to a Project .zip archive file.

2.14.2 Tools Menu

The Tools menu lets you set user options, configure systems, and view legacy reports. It has the following options:

Systems - displays the Systems Manager for configuring the systems on which you will run tests.

Repositories - displays the repositories dialog box for managing repositories.

Options - displays the Options dialog box for setting user preferences.

2.14.3 Help Menu

Contents - displays the table of contents for online help.

About - displays version and copyright information.

2.15 Toolbar Options

The toolbar has the following buttons for the Test Plan tab:

Refresh - refreshes the display.

Add - displays the Add Test Plan Node dialog box.

Edit - displays the Edit Test Plan Node dialog box.

Delete - deletes the selected item.

Copy - copies the selected node.

Paste - pastes the last copied node.

Note: Ctrl+C and Ctrl+V are supported for copy and paste.

View Clipboard - displays the Clipboard Viewer dialog box for viewing the current contents of the clipboard. Copied nodes will appear on the clipboard.

History - displays the History dialog box for viewing the history of the selected item.

Move Up - moves the selected item up one spot at its current level.

Move Down - moves the selected item down one spot at its current level.

Outdent - moves the selected item to the same level as its parent.

Indent - moves the selected item to a submenu of the previous item.

Goto - displays the test plan that is entered in the field.

The toolbar has the following buttons for the Requirements, Tests, Test Execution, and Issues tabs:

Refresh - refreshes the display.

Add - displays the Add dialog box based on the selected tab.

Edit - displays the Edit dialog box based on the selected item.

Delete - deletes the selected item.

Copy - copies the selected node.

Paste - pastes the last copied node.

> **Note:** Ctrl+C and Ctrl+V are supported for copy and paste.

View Clipboard - displays the Clipboard Viewer dialog box for viewing the current contents of the clipboard. Copied nodes will appear on the clipboard.

Find - displays the Find dialog box for searching requirements, tests, and issues.

History - displays the History dialog box for viewing the history of the selected item.

Schedule - displays the Schedule dialog box for scheduling tests. This button is not available for requirements and issues.

Move Up - moves the selected item up one spot at its current level. This button is not available for issues.

Move Down - moves the selected item down one spot at its current level. This button is not available for issues.

Outdent - moves the selected item to the same level as its parent. This button is not available for issues.

Indent - moves the selected item to a submenu of the previous item. This button is not available for issues.

Sort - displays the Sort dialog box for selecting how to display the left pane.

Group - displays the Group dialog box for selecting how to display the left pane. Group configurations can be saved and are listed in the drop down list. This button is not available for test execution.

Filter - displays the Filter dialog box for selecting the items to display in the left pane. Filter configurations can be saved and are listed in the drop down list.

Goto - displays the requirement, test, or issue that is entered in the field. Items that are not listed in the left pane because of the way the pane is filtered, are displayed in the Temporary Node.

Next - displays the next group of items based on the Maximum Tree Nodes setting in options.

Previous - displays the previous group of items based on the Maximum Tree Nodes setting in options.

The toolbar has the following button for Tests and Test Execution tabs:

Queue - opens the Agent Queue status window.

The toolbar has the following options on the Reports tab.

Refresh - refreshes the display.

Add - displays the Add Report dialog box for adding a custom report.

Edit - displays the Edit Report dialog box for editing the selected custom report. Standard reports cannot be changed.

Delete - removes the selected custom report. Standard reports cannot be deleted.

Clone - creates a copy of the selected standard or custom report. The copy can then be edited as needed.

Save - displays the Save Report dialog box for saving custom reports.

Email - displays the Email Report dialog box for emailing the selected report.

Print - displays the Print dialog box for printing the selected report.

Stop - stops loading the report. This is useful when the report is taking a long time to download.

Filter - displays the Filter dialog box for selecting the items to display in the left pane. Filter configurations can be saved and are listed in the drop down list.

The toolbar has the following options on the Dashboard tab.

Refresh - refreshes the display.

Add - displays the report tree for selecting the report you want to add to the Dashboard.

Delete - removes the selected report from the display.

Save - displays the Save Dashboard dialog box for saving the dashboard report.

Toggle - toggles the display of the report tree.

2.16 Changing Your User Options

Your user options contain your name, email address, password, and information about how you want to display items in Oracle Test Manager. If you are an administrative user, you will have an additional option for resetting test run results.

To change your user options:

1. Select **Options** from the **Tools** menu to display the Options dialog box.

    This dialog box has the following options:

    User Information - displays options for changing your name and e-mail address.

    - **Database** - displays the database that you are logged in to. This field cannot be changed.

    - **First Name** - displays your first name.

- **Last Name** - displays your last name.

- **E-mail** - enter your e-mail address.

- **LDAP User Name** - enter your LDAP User Name if using LDAP authentication.

- **Enable E-mail Notification** - select this check box to enable e mail notification when new issues are created or the assigned to field is changed. Notification is sent to the e-mail address entered in the E mail field.

Tree Preferences - these options let you customize tree behavior.

- **Maximum Number of Displayed Nodes** - enter the maximum number of tree nodes you want to display.

- **Include all of the associated nodes while copying a node** - when checked, associated nodes will be copied when copying a node. Otherwise, only the selected node is copied without any associated nodes.

Change Password - displays the following options for changing your password:

- **Change** - select this check box to change your password.

- **Old Password** - enter the current password.

- **New Password** - enter the new password.

- **Confirm New Password** - re-enter the new password.

Reset Test Runs - displays the following options for resetting test runs status for all tests:

- **Reset Test Run Status for all tests** - select this check box to set the test result status and summary text for all test runs.

- **Set Result to** - specifies the test result status to set for all test runs.

- **Set Summary to** - specifies the summary text to set for all test runs.

Reset User State - this option is used to reset the current user's state. Oracle Test Manager automatically saves the current state of the application for the current user when the user logs out of the application. The user state is used to return the user to the same place in the application at the next log in. Resetting the user state may become necessary if at any time an action does not complete properly and the progress bar indicator remains without completing.

Resetting the user state deletes the current user state, including groups, filters, and the currently remembered tab selection, and restores the default settings. You will be logged out of Oracle Test Manager to complete the reset.

- **Reset User State (for user :** *username***)** - select this option and click **Save** to reset the user state.

Right Hand Pane Display - displays the following options for setting right pane page options:

- **Use default/old layout for Test Execution tab** - when selected, the right pane of the Test Execution tab uses the pre-version 12.3 page layout.

- **Include Test Set Runs in Tests Tab** - when selected, the right pane of the Tests tab shows the Test Set Runs in the Run History section.

Reports - displays the following options for setting reports options:

- **Do not show warning when no filter selected for Test Set Run Trend report** - when selected, the warning message indicating that no filter is specified for

the Test Set Execution Trend report does not display when generating the trend report without a filter. See Section 9.2.1, "Working with Test Set Execution Reports" for additional information about defining Test Set Execution report filters.

2. Make any changes.

3. Click **OK**.

4. Click **OK**.

2.17 Grouping, Filtering, and Sorting Items

This section explains how to group and filter items in the tree.

2.17.1 Grouping Items

You can change the order in which requirements, tests, and issues are displayed in the tree view by changing the way they are grouped. The default view is not grouped, that is, items are listed in order.

You can optionally save a grouping configuration for use again at a later time. Saved groupings are listed in the drop down list in the toolbar.

Oracle Test Manager remembers and applies your last grouping selections the next time you log in.

To group items:

1. Select the tab corresponding to the category you want to group - requirements, tests, or issues.

2. Click **Group**.

   This dialog box has the following options:

   Saved groups - lists the saved grouping configurations. To edit or delete a saved group select it. Only administrator users can delete public groups.

   Save - displays the Save Criteria dialog box for saving the group settings. Grouping configurations do not have to be saved.

   Delete - deletes the selected saved group.

   Group by - select the top level grouping criteria.

   Then by - select the second level grouping criteria.

   Then by - select the third level grouping criteria.

   Then by - select the fourth level grouping criteria.

   Apply - applies the settings to the left pane.

3. Select how you want to group items. You can group by default and custom fields up to four levels.

4. Click **Apply** to use the settings immediately.

5. Click **Save** to save the settings for later use. The Save Criteria dialog box is displayed.

   Name - enter a name for the group. Saved groups are listed in the drop down list in the toolbar.

Private - when selected, the saved filter, group, or sort configuration is private to the logged in user creating the configuration.

Public - when selected, the saved filter, group, or sort configuration is made public to all logged in users. Only users with administrative privileges can create or delete public filters, groups, or sort configurations.

6. Enter a name, select public or private (if applicable), and click **OK**.

7. Click **OK**.

8. Click the folder level to display a list of items in the folder. Click the item for which you want to view details.

2.17.2 Filtering Items

You can filter the tree view to display only those items in which you are interested. You can filter by both default and custom fields. Requirements and tests must be grouped before they can be filtered. Issues can be filtered whether or not they are grouped.

Filter configurations can be saved for reuse later. Saved filters are listed in the drop down list in the toolbar.

Oracle Test Manager remembers and applies your last filtering selections the next time you log in.

To filter items:

1. Select the tab corresponding to the category you want to filter - requirements, tests or issues.

2. Click **Filter**.

    This dialog box has the following options:

    Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it. Only administrator users can delete public filters.

    Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

    Delete - deletes the selected saved filter.

    Search for - displays whether you are filtering requirements, tests, or issues.

    that match - select how to apply the filtering criteria.

    ■ **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

    ■ **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

    ■ **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

    ```
    (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
    Severity = High)
    ```

    <left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

3. Select how you want to match the criteria. Select **all** to match all criteria. Select **any** to match one criteria. Select a combination to create a filter using a combination of And and Or.

4. Select or enter the first value by which you want to filter.

5. Select **Equals** if you want to display items that match the value. Select **Not Equal to** if you want to display items that do not match the value.

6. Select the value to use.

7. Repeat these steps to filter to additional levels, if required.

8. Click **Apply** to immediately apply the filter to the left pane.

9. Optionally, click **Save** to save the filter for reuse. The Save Criteria dialog box is displayed.

   Name - enter a name for the filter. Saved filters are listed in the drop down list in the toolbar.

   Private - when selected, the saved filter, group, or sort configuration is private to the logged in user creating the configuration.

   Public - when selected, the saved filter, group, or sort configuration is made public to all logged in users. Only users with administrative privileges can create or delete public filters, groups, or sort configurations.

10. Enter a name for the filter, select public or private (if applicable), and click **OK**.

11. Click **OK**.

Note: Items that are not displayed are still in the database. To display the default view set the filter selection to **None**.

2.17.3 Sorting Items

You can change the sort order of items in the tree view to display items by name or ID.

Sort configurations can be saved for reuse later. Saved sort configurations are listed in the drop down list in the toolbar.

Oracle Test Manager remembers and applies your last sort selections the next time you log in.

To sort items:

1. Select the tab corresponding to the category you want to sort - requirements, tests, test execution, or issues.

2. Click **Sort**.

   This dialog box has the following options:

   Saved Sorts - lists the saved sort configurations. Select a saved sort to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Sort configurations do not have to be saved.

   Delete - deletes the selected saved sort configuration.

   Sort by - select the top level sort criteria: none, Id or Name.

   Sort Order - select the sort order: Ascending or Descending.

   Case Sensitive - if sorting by Name, select if the sort is case sensitive.

3. Select the **Sort by** value as name or Id.

4. Select the **Sort Order** type as Ascending or Descending.

5. If **Sort by** is set as Name, select if the sort is case sensitive.

6. Click **Apply** to immediately apply the sort configuration to the left pane.

7. Optionally, click **Save** to save the sort configuration for reuse. The Save Criteria dialog box is displayed.

   Name - enter a name for the sort configuration. Saved sort configurations are listed in the drop down list in the toolbar.

   Private - when selected, the saved filter, group, or sort configuration is private to the logged in user creating the configuration.

   Public - when selected, the saved filter, group, or sort configuration is made public to all logged in users. Only users with administrative privileges can create or delete public filters, groups, or sort configurations.

8. Enter a name, select public or private (if applicable), and click **OK**.

9. Click **OK**.

3

Working With Projects

This chapter explains how to maintain projects, use attachments, create links, and view history.

3.1 Project Basics

A **project** is the collection of related requirements, tests, and issues grouped together under a project name.

3.2 Working With Projects

You can open existing projects. Use the Administrator to add new projects.

3.2.1 Adding Repositories

Repositories give you the ability to share files. Any shared directory can be used as a repository. Since the Oracle Application Testing Suite Application Service runs as the local SYSTEM user, there may be a policy restricting access to your network share. You can fix this by doing one of the following:

- Ensure that both sharing permissions and security permission on the remote network directory allows for other SYSTEM users to gain access. The least restrictive setting is to allow the windows user "Everyone" to be given permission.

- Configure the Oracle Application Testing Suite Application Service to run under a specific user account rather than the local System user account.

To add a repository:

1. Select **Repositories** from the **Tools** menu.

   This dialog box has the following options:

   New - adds a new entry to the table.

   Delete - deletes the selected repository.

   Name - enter the name of the repository.

   Path - enter the path of the repository. If the path that you specify is a shared network drive, the Oracle Load Testing Server must have access to that drive. By default the Oracle Test Manager Server runs under the "Local System" account. You may need to change this to run a user account in the Services panel.

2. Click **New**. A new entry is made in the table.

3. Enter the name of the repository.

4. Enter the location of the repository.

5. Click **OK**.

3.2.2 Opening Projects

To open a project:

1. Select **Open** from the **Project** menu.

   This dialog box has the following options:

   Search - specify the full or partial name of a project to search for and display in the list of projects.

   Project - lists the projects in the selected database and search criteria.

   Database - lists the available databases.

2. Select the database that contains the project you want to open. The projects displayed are only those in the selected database and search criteria.

3. Select the project you want to open.

4. Click **OK**.

3.2.3 Attaching Files to Test Plans, Requirements, Tests, or Issues

To attach a file:

1. Select the requirement, test, or issue to which you want to add an attachment.

2. Select **Add/Edit** from the Attachments section of the right panel.

   This dialog box shows a list of files and links in separate sections. A message is displayed if none have been created. This dialog box has the following options:

   File/Link - displays the full path and name of the attachment. Displays the description or the URL for the link.

   Location - displays Database if the attachment was stored in the database, otherwise displays the path.

   Close - closes the dialog box.

   Add - displays the Add File dialog box for adding a file or link.

   Remove - either removes the reference to the selected attachment or removes the selected attachment from the database. Attachments are not deleted from the local machine. Removes the selected link.

   Update DB - for attachments stored in the database, updates the selected attachment, otherwise stores the attachment in the database.

   Save Local - for attachments stored in the database, displays the Save As dialog box for saving the attachment to the local machine.

   Edit Link - displays the Update Link dialog box for editing the selected link.

3. Click **Add** to display the Add File dialog box.

   File - lets you attach a file that will be listed in the Attachments section. Enter the name and location of the file or click **Browse**.

   ■ **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

- **Title** - enter a descriptive title for the link. This will be displayed in the Links section. This field is required.

- **Link** - enter the URL. For example, `http://www.company.com`.

4. Click **Browse** to attach an existing file.

5. Navigate to the file you want to attach and select it.

6. Click **Open**.

7. Uncheck **Upload to DB** if you do not want to save the attachment in the database.

8. Click **Upload**.

9. Click **Close**.

3.2.4 Opening Attachments

Attachments are opened in a separate window in their associated application. You can open attachments that are stored in the database or located on the machine you are using. You can edit attachments stored in the database. If you do, Oracle Test Manager asks you if you want to save the changes to the database when you close the window.

To open an attachment:

1. Select the requirement, test, or issue containing the attachment.

2. Click the attachment that you want to open in the Attachment section of the right pane.

3.2.5 Creating Links

You can create a link for requirements, tests, and issues. These links are listed in the Link section on the right-hand side of the screen. When clicked, the URL is displayed in a separate browser window. To create a link:

1. Select the requirement, test, or issue to which you want to add a link.

2. Select **Add/Edit** from the Links section of the right panel.

   This dialog box shows a list of files and links in separate sections. A message is displayed if none have been created. This dialog box has the following options:

   File/Link - displays the full path and name of the attachment. Displays the description or the URL for the link.

   Location - displays Database if the attachment was stored in the database, otherwise displays the path.

   Close - closes the dialog box.

   Add - displays the Add File dialog box for adding a file or link.

   Remove - either removes the reference to the selected attachment or removes the selected attachment from the database. Attachments are not deleted from the local machine. Removes the selected link.

   Copy to DB/Update DB - for attachments stored in the database, updates the selected attachment, otherwise stores the attachment in the database.

   Save Local - for attachments stored in the database, displays the Save As dialog box for saving the attachment to the local machine.

   Edit Link - displays the Update Link dialog box for editing the selected link.

3. Click **Add** to display the Add File dialog box.

    File - lets you attach a file that will be listed in the Attachments section. Enter the name and location of the file or click **Browse**.

    - **Browse** - displays the Choose File dialog box for selecting the file to attach.

    Link - lets you add a link to the Links section.

    - **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

    - **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

4. Click **Link**.

5. Enter a descriptive title for the link. This will be displayed in the Links section.

6. Enter the URL for the link. If a title is not entered, the URL is displayed in the Links section.

7. Click **Upload**.

8. Click **Close**.

3.2.6 Copying and Pasting Nodes Between Projects

Oracle Test Manager lets users with write privileges to copy and paste nodes between projects. Nodes that can be copied and pasted between projects include Test Plans, Requirements, Tests, Test Execution, and Issues.

To copy nodes between projects:

1. Start Oracle Test Manager and open the project you want to copy from by selecting **Open** from the **Project** menu.

2. Select the tab you want to copy from.

3. Select the node or nodes you want to copy. Use Shift-click to select a contiguous set of nodes. Use Ctrl-click to select a non-contiguous set of nodes.

4. Click the **Copy** toolbar button. You can view and clear the contents of the clipboard by clicking the **View Clipboard** tabular button.

5. Select **Open** from the **Project** menu and select the project you want to copy to.

6. Select the same tab the nodes were copied from.

7. If you are copying into an existing tree, select the node were you want the copied node(s) to be placed.

8. Click the **Paste** toolbar button.

3.2.7 Viewing History

You can view, by date, the history of changes for an individual requirement, test, or issue. To view history:

1. Select the requirement, test, or issue that you want to view.

2. Click **History** on the toolbar.

    This dialog box has the following options:

    Date - lists the dates on which changes were made to the selected item.

<Detail> - displays the details of the selected item as of the selected date.

3. Select the date you want to view.

4. Click **Close** when you are done.

3.2.8 Searching Projects

You can search requirements, tests, and issues based on the value of individual fields. In addition, you can search all text fields and search for items by creation date.

You can optionally save a search configuration, that is, a filter, for use again at a later time. Saved filters are listed in the drop down list in the Saved Filters field on the Find dialog box and are listed in the Filters dropdown on the toolbar so that you can use the filter to determine what is displayed in the left tree.

Oracle Test Manager remembers and applies your last search selections the next time you click **Find** whether or not you saved it.

To search:

1. Click **Find**.

   This dialog box has the following options:

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - select whether you are searching requirements, tests, or issues.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     Severity = High)
     ```

   <left parenthesis> - select the left parenthesis up to three.

   Field - select the field that you want to use to select the items to display.

   Operator

   - **Equals** - causes only items that match the value for the selected field to be displayed.

   - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - lists the matches.

Navigate - navigates to the selected result and displays it in the right pane.

Preview - shows a preview of the selected result in a separate window.

2. Select the component through which you want to search.

3. Select how you want to match the criteria. Select **all** to match all criteria. Select **any** to match one criteria. Select a **combination** to create a filter using a combination of And and Or.

4. Select or enter the first value by which you want to filter.

5. Select **Equals** if you want to display items that match the value. Select **Not Equal to** if you want to display items that do not match the value.

6. Select the value to use.

> **Note:** You can use SQL characters for searching. For example, if you wanted to find all issues that contained Joe Smith and Mary Jones in the description field, you could enter %Joe Smith%Mary Jones% in the value field.

If you select Creation Date, a calendar icon is displayed to the right of the value field for selecting a date and two additional operators are available, one for less than or equal to and one for greater than or equal to.

The calendar has the following options:

dash (-) - toggles the first column displayed between Sun and Mon.

<< and >> - displays the same month in the previous or next year.

< and > - displays the previous or next month.

7. Repeat these steps to filter to additional levels, if required.

8. Optionally, click **Save** to save the filter for reuse. The Save Criteria dialog box is displayed.

   Name - enter a name for the filter. Saved filters are listed in the drop down list in the toolbar.

9. Enter a name for the filter and click **OK**.

10. Click **Search**.

11. Double-click on an item in the Results list or click **Navigate** to display it. Click **Preview** to display the item in a separate window.

12. Click **Cancel** when you are done.

3.2.9 Importing Data

You can import data from either a CSV, XLS, or an exported Oracle Test Manager ZIP file into the current project in the Oracle Test Manager database for the following types of nodes. Only users with write permission can import data.

- Requirements

- Tests and Test Sets - manual tests, OpenScript tests, and test folders can be imported. Test folder child nodes cannot be imported at the same time as the test folder.

- Attach files included in an exported Oracle Test Manager ZIP file.

- Issues

- Test Plans

- Test run results for manual tests - test step actions cannot be updated. The expected result can only have a comment added for the run and the actual results string.

For exported Oracle Test Manager ZIP files, only the data that was exported to the archive ZIP file will be included when the data is imported.

To import data, the columns in the imported file must be matched to the fields in the database. Oracle Test Manager assumes that the first row in the file being imported contains labels indicating the type of data in the columns. You can manually map the columns to the database fields or you can let Oracle Test Manager automatically map the fields.

Once the fields are mapped, you can choose to save the mappings to a mapping file for future use so commonly used mappings will not have to be defined each time you import data. Mapping files are shared across all users.

Records will not be imported if the following conditions occur:

- For Test Run Results, the test case ID and the number of test steps in t he test case must match. If there is a mismatch, the records is not imported.

- If a field being imported contains data that is too long for the target field, the record is not imported.

- If an imported record contains a required field that does not contain data, the record is still imported but will contain a default value.

The Oracle Test Manager parser expects only the "test step" columns be present in the rows that represent a test step and all other columns should be empty (i.e. no whitespace). Errors are logged to the `<installdir>\OTM\debugcom.log` file on the installation drive.

If a new item is imported, email notification occurs based on the current rules.

Once you start importing, you can continue working in Oracle Test Manager. The Import Result dialog box is displayed when importing is finished.

> **Note:** Interrupting the import process by logging out of Oracle Test Manager, closing the browser window, or stopping the Oracle Application Testing Suite application Service could result in database corruption.

To import data:

1. Select **Import data** from the **Project** menu to display the Import dialog box.

   This dialog box has the following options:

   File Name - enter the file name or click browse to select the CSV, XLS, or exported Oracle Test Manager ZIP file that you want to import.

2. Enter a file name or click **Browse** to locate the file you want to import.

3. Click **Upload**.

   This dialog box has the following options:

   Select Type - select the type of data you are importing.

   Mappings - you can save mappings set up in this dialog box for use with future imports.

   - **Available Mappings** - lists saved mapping files. Select a file to apply to the current import. Click the X to delete the mapping file.

   - **Save Mappings** - when selected a text box is displayed for entering a file name for the mappings. When you click **OK** the mappings are saved.

   CSV/XLS Column Name - lists the columns in the file you are importing.

   Right Arrows - maps the selected column name to the selected database field name.

   Left Arrows - removed the mapping from the selected database field name.

   OK - continues the import process and if Save Mappings is selected, creates a mapping file.

   Cancel - cancels the import.

   Help - displays help.

   Auto Match - creates mapping for column names that match database field names.

4. Select the type of data you are uploading. If you select a mapping file, the type of data is automatically selected.

5. Match the column labels to the database name fields. You can do this in the following ways:

   - select a mapping file. If the mappings do not match the file being imported an error message is displayed.

   - click the **Auto Match** button to automatically map column headers to matching database fields.

   - manually select a column label and a database field and click the right arrows button.

6. Click **OK**. The Import in progress dialog box is displayed.

7. Click **OK**. The Import Result dialog box is displayed when importing is finished.

   This dialog box has the following options:

   Success - displays the number of records that were successfully imported.

   Failures - displays the number of records that failed to be imported.

   Messages - displays messages about the import.

3.2.10 Exporting Projects

You can export project data to an archive file that can then be imported into another project or instance of Oracle Test Manager. The Export Project menu option opens a dialog box for selecting the type of data to export. The export procedure creates an archive .zip file containing an .xml file with the exported data. The archive .zip file can be imported into another project or instance of Oracle Test Manager.

To export project data:

1. Select **Export Project** from the **Project** menu to display the Export dialog box.

    This dialog box has the following options:

    Requirements - when selected, project requirements data is exported to the archive .zip file. When cleared, requirements data is not included in the export file.

    Issues - when selected, project Issues data is exported to the archive .zip file. When cleared, Issues data is not included in the export file.

    Tests and Test Sets - when selected, project Test and Test Set data is exported to the archive .zip file. When cleared, Test and Test Sets data is not included in the export file.

    Test Plans - when selected, project Test Plans data is exported to the archive .zip file. When cleared, Test Plans data is not included in the export file.

    Attach Files - when selected, project Attach Files data is exported to the archive .zip file. When cleared, Attach Files data is not included in the export file.

    Encoding - specifies the encoding to use when exporting projects, as follows:

    - **UTF-8** - specifies UTF-8 character encoding for the exported XML. This is the default setting used for most databases using only the standard ASCII character set range.

    - **ISO-8859-1** - specifies ISO-8859-1 character encoding for the exported XML. Use this setting if your database has been customized to use characters outside of the standard ASCII character set range. See http://support.microsoft.com/kb/238833 for additional information.

2. Select which types of data to export.

3. If you have a customized database containing special characters, change the encoding to ISO-8859-1.

4. Click **Export**.

5. Select **Open** to open the archive file in your default zip utility or click **Save** to save the archive file to disk. If you save to disk, specify the drive and directory location then click **Save**.

4

Working With Test Plans

Test plans reflect the test plan for the project. Similar test plans can be grouped together into branches for easy management. Once entered, you associate requirements with them so you know which requirements are specified for the test plan.

4.1 Adding Test Plans

> **Note:** The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

To add a test plan:

1. Select the **Test Plans** tab.

2. Click **Add**.

   This dialog box has the following options:

   Name - enter the name of the test plan.

   Owner - select the user that owns the test plan. Only users with read permission for this project are listed. These options can be changed by your system administrator.

   Priority - select the priority of the test plan. These options can be changed by your system administrator.

   Description - enter additional details about the test plan.

   Reset - sets all fields back to their original values.

   Attachment - lets you add an attachment or link to this test plan.

   File - lets you add an attachment to the Attachments section.

   - **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

   - **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

   - **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

3. Enter the test plan details.

   4. Click **OK**.

4.2 Deleting Test Plans

To delete one test plan or branch:

1. Select the test plan or branch that you want to delete.

2. Click **Delete**.

3. Click **Yes** when asked to confirm the deletion. The test plan and all its sub test plans are deleted from the database.

To delete multiple test plans:

1. Select the test plans you want to delete using SHIFT-click and CTRL-click.

2. Click **Delete**. The Delete Test Plans dialog box is displayed showing the selected test plans.

   Selected nodes - lists the nodes that you selected. Uncheck any nodes that you do not want to delete.

   OK - deletes the selected nodes.

   Reset - checks all of the nodes.

3. Deselect any nodes that you do not want to delete.

4. Click **OK**.

4.3 Editing Test Plans

> **Note:**   The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

To edit a test plan:

1. Select the test plan you want to edit.

2. Click **Edit**.

   This dialog box has the following options:

   Name - enter the name of the test plan.

   Owner - select the user that owns the test plan. Only users with read permission for this project are listed. These options can be changed by your system administrator.

   Priority - select the priority of the test plan. These options can be changed by your system administrator.

   Description - enter additional details about the test plan.

   Reset - sets all fields back to their original values.

3. Make any changes.

4. Click **OK**.

4.4 Editing Multiple Test Plans

You can edit several test plans at the same time if you want to make the same change to them all. To edit multiple test plans:

1. Select the test plans you want to edit.

2. Select **Edit Test Plan** from the right-click menu.

   Selected nodes - lists the selected nodes. Deselect nodes that you do not want to edit.

   Fields - the fields listed are determined by the type of node and whether there are any custom fields.

   Check Box - select the check box to change the field's value. The change will be applied to all of the selected nodes.

3. Deselect any nodes that you do not want to change.

4. Select a field that you want to change.

5. Select or enter the new value. The change will be made to all of the selected nodes.

6. Repeat for all fields that you want to change.

7. Click **Save**.

4.5 Associating Requirements With Test Plans

There are two ways to associate requirements with test plans. You can search for requirements that contain designated values in one or more fields or you can select requirements from a tree view.

To associate requirements with a test plan using search:

1. Select the test plan with which you want to associate requirements.

2. Select **Add/Edit** in the Associated Requirements section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - displays requirements only.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     ```

```
Severity = High)
```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the requirements that you want to associate and click **Select** or click **Select All** to associate all tests that matched the search criteria.

5. Click **OK**. The requirements are listed in the right pane under associated tests.

To associate requirements with a test plan using the tree view:

1. Select the test plan with which you want to associate requirements.

2. Select **Add/Edit** in the Associated Requirements section of the right pane.

   <test list> - double click requirements to add and delete them from the list of associated requirements or select the requirements you want to add and click **Select**.

   - **Select** - places the selected requirement in the **Associated Nodes** field.

   - **Select All** - places all requirements in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the requirements that are associated with this test plan.

   - **Remove** - removes the selected requirement from the **Associated Nodes** field.

   - **Remove All** - removes all requirements from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Select the requirements you want associated with this test plan and click **Select** or click **Select All** to associate all requirements.

4. To remove nodes from the **Associated Nodes** field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The requirements will be listed in the right pane under associated requirements.

4.6 Associating Test Sets With Test Plans

There are two ways to associate test sets with test plans. You can search for test sets that contain designated values in one or more fields or you can select from a tree view.

To associate test sets with a test plan using search:

1. Select the test plan with which you want to associate test sets.

2. Select **Add/Edit** in the Associated Test Sets section of the right pane.

    Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

    Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

    Delete - deletes the selected saved filter.

    Search for - displays test sets only.

    that match - select how to apply the filtering criteria.

    - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

    - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

    - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

        ```
        (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
        Severity = High)
        ```

    <left parenthesis> - select the left parenthesis up to three.

    Field - select the field that you want to use to select the items to display.

    Operator

    - **Equals** - causes only items that match the value for the selected field to be displayed.

    - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

    Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the test sets that you want to associate and click **Select** or click **Select All** to associate all test sets that matched the search criteria.

5. Click **OK**. The test sets are listed in the right pane under associated test sets.

To associate test sets with a test plan using the tree view:

1. Select the test plan with which you want to associate test sets.

2. Select **Add/Edit** in the Associated Test Sets section of the right pane.

   <test list> - double click test sets to add and delete them from the list of associated test sets or select the requirements you want to add and click **Select**.

   - **Select** - places the selected test set in the **Associated Nodes** field.

   - **Select All** - places all test sets in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the test sets that are associated with this test plan.

   - **Remove** - removes the selected test set from the **Associated Nodes** field.

   - **Remove All** - removes all test sets from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the test sets you want associated with this test plan and click **Select** or click **Select All** to associate all test sets.

4. To remove nodes from the **Associated Nodes** field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The test sets will be listed in the right pane under associated test sets.

4.7 Emailing Test Plans

You can email a test plan to one or more people. For email to work, the SMTP server must be configured using the Oracle Test Manager Administrator.

To email a test plan:

1. Click the **Test Plans** tab.

2. Select the test plan that you want to email and click **Email**.

   Send to - enter the email addresses of the people to whom you want to email this test plan. Separate email addresses by a comma.

   To - displays the Select Email recipients dialog box for selecting recipients from a list.

   Subject - enter the text that you want to appear in the subject of the email. The default includes the name and id of the test plan.

   Message - enter the text that you want to appear in the message.

3. Enter the recipient email addresses separated by a comma or click To to display the Select Email Recipients dialog box.

   <recipient list> - lists users in you database that have email notification enabled.

   Select - adds the selected recipients to the **To** field.

   To - displays the selected recipients separated by a comma.

4. Select the recipients that you want to receive the test plan and click **Select**. Note that only users in your database that have email notification enabled are listed in the dialog box.

5. Click **Done** when you are finished.

6. Change the subject if necessary.

7. Enter a message if necessary.

8. Click **OK**.

5

Working With Requirements

Requirements reflect the test plan for the project. Similar requirements can be grouped together into branches for easy management. Once entered, they can be associated with the tests that address them.

5.1 Adding Requirements

Note: The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

To add a requirement:

1. Select the **Requirements** tab.

2. Click **Add**.

   This dialog box has the following options:

   Name - enter the name of the requirement.

   Type - enter the type of requirement. These options can be changed by your system administrator.

   Owner - select the user that owns the requirement. Only users with read permission for this project are listed. These options can be changed by your system administrator.

   Status - select the status of the requirement. These options can be changed by your system administrator.

   Priority - select the priority of the requirement. These options can be changed by your system administrator.

   Description - enter additional details about the requirement.

   Reset - sets all fields back to their original values.

   Attachment - lets you add an attachment or link to this requirement.

   File - lets you add an attachment to the Attachments section.

   - **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

   - **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

3. Enter the requirement details.

4. Click **OK**.

5.2 Deleting Requirements

To delete one requirement or branch:

1. Select the requirement or branch that you want to delete.

2. Click **Delete**.

3. Click **Yes** when asked to confirm the deletion. The requirement and all its sub requirements are deleted from the database.

To delete multiple requirements:

1. Select the requirements you want to delete using SHIFT-click and CTRL-click.

2. Click **Delete**. The Delete Requirements dialog box is displayed showing the selected requirements.

   Selected nodes - lists the nodes that you selected. Uncheck any nodes that you do not want to delete.

   OK - deletes the selected nodes.

   Reset - checks all of the nodes.

3. Deselect any nodes that you do not want to delete.

4. Click **OK**.

5.3 Editing Requirements

> **Note:** The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

To edit a requirement:

1. Select the requirement you want to edit.

2. Click **Edit**.

   This dialog box has the following options:

   Name - enter the name of the requirement.

   Type - enter the type of requirement. These options can be changed by your system administrator.

   Status - select the status of the requirement. These options can be changed by your system administrator.

   Owner - select the user that owns the requirement. Only users with read permission for this project are listed. These options can be changed by your system administrator.

Priority - select the priority of the requirement. These options can be changed by your system administrator.

Description - enter additional details about the requirement.

Reset - sets all fields back to their original values.

3. Make any changes.

4. Click **OK**.

5.4 Editing Multiple Requirements

You can edit several requirements at the same time if you want to make the same change to them all. To edit multiple requirements:

1. Select the requirements you want to edit.

2. Select **Edit Requirement** from the right-click menu.

Selected nodes - lists the selected nodes. Deselect nodes that you do not want to edit.

Fields - the fields listed are determined by the type of node and whether there are any custom fields.

Check Box - select the check box to change the field's value. The change will be applied to all of the selected nodes.

3. Deselect any nodes that you do not want to change.

4. Select a field that you want to change.

5. Select or enter the new value. The change will be made to all of the selected nodes.

6. Repeat for all fields that you want to change.

7. Click **Save**.

5.5 Associating Test Plans With Requirements

There are two ways to associate test plans with requirements. You can search for test plans that contain designated values in one or more fields or you can select test plans from a tree view.

To associate test plans with a requirement using search:

1. Select the requirement with which you want to associate test plans.

2. Select **Add/Edit** in the Associated Test Plans section of the right pane.

Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

Delete - deletes the selected saved filter.

Search for - displays whether you are searching issues, requirements, tests, test plans, or test sets.

that match - select how to apply the filtering criteria.

- **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

- **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

- **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

  ```
  (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
  Severity = High)
  ```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the test plans that you want to associate and click **Select** or click **Select All** to associate all test plans that matched the search criteria.

5. Click **OK**. The test plans are listed in the right pane under associated test plans.

To associate test plans with a requirement using the tree view:

1. Select the requirement with which you want to associate test plans.

2. Select **Add/Edit** in the Associated Test Plans section of the right pane.

<test list> - double click test plans to add and delete them from the list of associated test plans or select the test plans you want to add and click **Select**.

- **Select** - places the selected test plan in the **Associated Nodes** field.

- **Select All** - places all test plans in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the test plans that are associated with this requirement.

- **Remove** - removes the selected test from the **Associated Nodes** field.

- **Remove All** - removes all tests from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Select the test plans you want associated with this requirement and click **Select** or click **Select All** to associate all test plans.

4. To remove nodes from the **Associated Nodes** field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The test plans will be listed in the right pane under associated test plans.

5.6 Associating Tests With Requirements

There are two ways to associate tests with requirements. You can search for tests that contain designated values in one or more fields or you can select tests from a tree view.

To associate tests with a requirement using search:

1. Select the requirement with which you want to associate tests.

2. Select **Add/Edit** in the Associated Tests section of the right pane.

Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

Delete - deletes the selected saved filter.

Search for - displays whether you are searching requirements, tests, or issues.

that match - select how to apply the filtering criteria.

- **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

- **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

- **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

  ```
  (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
  Severity = High)
  ```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the tests that you want to associate and click **Select** or click **Select All** to associate all tests that matched the search criteria.

5. Click **OK**. The tests are listed in the right pane under associated tests.

To associate tests with a requirement using the tree view:

1. Select the requirement with which you want to associate tests.

2. Select **Add/Edit** in the Associated Tests section of the right pane.

   <test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

   - **Select** - places the selected test in the **Associated Nodes** field.

   - **Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the tests that are associated with this requirement.

   - **Remove** - removes the selected test from the **Associated Nodes** field.

   - **Remove All** - removes all tests from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the tests you want associated with this requirement and click **Select** or click **Select All** to associate all tests.

4. To remove nodes from the **Associated Nodes** field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The tests will be listed in the right pane under associated tests.

5.7 Emailing Requirements

You can email a requirement to one or more people. For email to work, the SMTP server must be configured using the Oracle Test Manager Administrator. To email a requirement:

1. Click the **Requirements** tab.

2. Select the requirement that you want to email and click **Email**.

   Send to - enter the email addresses of the people to whom you want to email this requirement. Separate email addresses by a comma.

   To - displays the Select Email recipients dialog box for selecting recipients from a list.

   Subject - enter the text that you want to appear in the subject of the email. The default includes the name and id of the requirement.

   Message - enter the text that you want to appear in the message.

3. Enter the recipient email addresses separated by a comma or click To to display the Select Email Recipients dialog box.

   <recipient list> - lists users in you database that have email notification enabled.

   Select - adds the selected recipients to the To field.

   To - displays the selected recipients separated by a comma.

4. Select the recipients that you want to receive the requirement and click **Select**. Note that only users in your database that have email notification enabled are listed in the dialog box.

5. Click **Done** when you are finished.

6. Change the subject if necessary.

7. Enter a message if necessary.

8. Click **OK**.

6

Working With Tests

Tests can be manual or automatic. Automatic Oracle OpenScript scripts can be run from Oracle Test Manager. For manual tests, you enter the individual test steps. When you run a manual test, a wizard guides you through each step, allowing you to enter the results.

Tests can be grouped together into branches for easy management. Once entered, they can be associated with the requirements they address or any issues that result from running the test.

When you run a test, you can specify the workstation to run it on. Workstations are configured using the Systems Manager. To run Oracle OpenScript tests on remote systems, you must also install the Oracle Application Testing Suite Remote Agent on the remote system and configure Remote Agent Service login credentials. See the "Installing the Oracle Load Testing Remote Agent" section in the *Oracle Application Testing Suite Installation Guide* for additional information about installing the agent and configuring the login credentials.

In addition, tests can be scheduled to run once at a specified day and time, daily at a specified time, or weekly at a specified day and time.

6.1 Adding Oracle OpenScript Scripts

Oracle OpenScript scripts can be added from the Web interface. To add an Oracle OpenScript test:

1. Select the **Tests** tab.

2. Click the **Add** button.

3. Enter a name for the test.

4. Select **Oracle OpenScript** in the Type field.

    This dialog box has the following options:

    Name - displays the test name.

    Type - displays the type of test. The last type selected is displayed first in the list.

    - **Manual Test** - manual tests are entered, performed, and kept track of manually.

    - **Test folder** - high level descriptions for grouping tests together.

    - **Oracle OpenScript** - scripts created using Oracle OpenScript.

    - **3rd Party Test** - use this option when you want to run an executable file and capture the results.

- **JUnit Test** - use this option when you want to run an Ant file and capture the results.

Test File - for JUnit and 3rd Party tests, displays the file that will run. Click **Browse** to display the Choose File dialog box for selecting the file.

Repository - for OpenScript scripts, specifies the repository where the script is located. Click **Find** to display the Select Script dialog box for selecting the script file.

Workspace - for OpenScript scripts, specifies the workspace where the script is located. When you select a script using **Find**, the workspace will be filled in automatically.

OpenScript - specifies the OpenScript script file name. When you select a script using **Find**, the script name will be filled in automatically.

Command line run setting - specifies the OpenScript command line run settings to use when running OpenScript scripts. This option only appears when **Type** is set to Oracle OpenScript. You must explicitly specify the OpenScript repository path of the agent machine as a command line setting if the Operating System of the agent machine is different from the Oracle Test Manager controller's Operating System (for example, if the controller is on Windows and the agent is on Linux). The syntax is as follows:

```
-repository repository_name=full_path_of_repository
```

See the Command line settings in the *Oracle Functional Testing OpenScript User's Guide* or OpenScript online help for the available settings.

OpenScript password - specifies the script password to use to access scripts that have the encryption password specified in OpenScript. If you add an OpenScript test and select an OpenScript script with an encryption password, the same password is required here to access and playback the script in Oracle Test Manager.

Owner - select the user that owns the test. Only users with read permission for this project are listed.

Functionality - for 3rd party tests, displays the regular expression that you want to match for a result of passed. For all other test types, displays the description of the functionality the test is designed to verify.

Priority - displays the priority of the test. These options can be changed by your system administrator.

Description - displays the test description.

Attachment - lets you add an attachment or link to this test.

File - lets you add an attachment to the Attachments section.

- **Browse** - displays the Choose File dialog box for selecting the file to attach.

Link - lets you add a link to the Links section.

- **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, http://www.company.com. If a title is not entered, the URL is displayed in the links section.

Reset - clears the fields and returns the dialog box options to the starting state.

5. Click **Find** to display the Select Script dialog box.

6. Select the Repository and Workspace.

7. Select the Oracle OpenScript script that you want to add.

8. Enter command line settings and OpenScript password if required.

9. Click **OK**.

10. Select the owner and priority and enter any descriptive information in the **Functionality** and **Description** fields.

11. Click **Save**.

6.2 Adding Manual Tests

> **Note:** The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

Tests are automatically numbered when you enter them. You can reorder them using the **Move** buttons. To add a manual test:

1. Select the **Tests** tab.

2. Click the **Add** button.

3. Enter the name of the test.

4. Select the **Manual Test** in the Type field.

This dialog box has the following options:

Name - displays the test name.

Type - displays the type of test.

- **Manual Test** - manual tests are entered, performed, and kept track of manually.
- **Test folder** - high level descriptions for grouping tests together.
- **Oracle OpenScript** - scripts created using Oracle OpenScript.
- **3rd Party Test** - use this option when you want to run an executable file and capture the results.
- **JUnit Test** - use this option when you want to run an Ant file and capture the results.

Owner - select the user that owns the test. Only users with read permission for this project are listed.

Functionality - for 3rd party tests, displays the regular expression that you want to match for a result of passed. For all other test types, displays the description of the functionality the test is designed to verify.

Priority - displays the priority of the test. These options can be changed by your system administrator.

Description - displays the test description.

Attachment - lets you add an attachment or link to this test.

File - lets you add an attachment to the Attachments section.

- **Browse** - displays the Choose File dialog box for selecting the file to attach.

Link - lets you add a link to the Links section.

- **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

Reset - clears the fields and returns the dialog box options to the starting state.

5. Select the owner of the test.

6. Enter a description of the functionality to be tested.

7. Select the test priority.

8. Enter a description of the test.

9. Click **Save**.

10. Select **Add/Edit** in the Test Steps section of the right-hand pane.

This dialog box has the following options:

Add - adds a new row under the selected row. When you click the tab key the test in the Action, Expected Result, and Comment fields is added to the grid. Clicking **Add** again also populates the grid.

Delete - deletes the selected step.

Move Up - moves the selected step up one position in the list.

Move Down - moves the selected step down one position in the list.

First - display the first step.

Previous - displays the previous step.

Next - displays the next step.

Last - displays the last step.

- displays the step number.

Action - displays the action to perform.

Expected Result - displays a description of what is expected to happen as a result of this step.

Comment - displays additional information about the step.

Add/Edit Attachments - displays the Add Attachment dialog box for adding an attachment associated with this test step. Attachments are listed in the Test Steps section of the right-hand pane.

11. Click **Add**.

12. Enter the information in the Action, Expected Result, and Comment fields for the step. The gird is populated when move to the next field or when you click **Add**.

13. Click **Add/Edit Attachments** to add an attachment associated with this step.

14. Click **Add** to add another step or **OK** to exit the dialog box when you are finished adding steps.

6.3 Adding Test Folder

Folders are automatically numbered when you enter them. You can reorder them using the Move buttons. To add a test folder:

1. Select the **Tests** tab.

2. Click the **Add** button.

3. Enter a name for the test.

4. Select **Test Folder** in the Type field.

   This dialog box has the following options:

   Name - displays the test name.

   Type - displays the type of test. The last type selected is displayed first in the last.

   - **Manual Test** - manual tests are entered, performed, and kept track of manually.

   - **Test folder** - high level descriptions for grouping tests together.

   - **Oracle OpenScript** - scripts created using Oracle OpenScript.

   - **3rd Party Test** - use this option when you want to run an executable file and capture the results.

   - **JUnit Test** - use this option when you want to run an Ant file and capture the results.

   Owner - select the user that owns the test. Only users with read permission for this project are listed.

   Functionality - for 3rd party tests, displays the regular expression that you want to match for a result of passed. For all other test types, displays the description of the functionality the test is designed to verify.

   Priority - displays the priority of the test. These options can be changed by your system administrator.

   Description - displays the test description.

   Attachment - lets you add an attachment or link to this test.

   File - lets you add an attachment to the Attachments section.

   - **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

   - **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

   - **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

   Reset - clears the fields and returns the dialog box options to the starting state.

5. Enter a description of the functionality of the folder.

6. Select the owner and priority and enter any descriptive information in the **Functionality** and **Description** fields.

7. Click **Save**.

6.4 Adding Third Party Tests

> **Note:** The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

The 3rd party test lets you run an executable file and capture the results. Before creating the 3rd party test, create a batch or command file using a text editor such as Notepad. This file can contain anything that can be run from the command line.

Once you create the test, you can add test steps that use regular expressions to parse the test output to determine if the test was successful. If all test steps pass, the test result is passed. If one step fails, the test result is failed.

After the test has run, you can view the console output in the results report. To add a 3rd Party test:

1. Select the **Tests** tab.

2. Click the **Add** button.

3. Enter a name for the test.

4. Select **3rd Party Test** in the Type field.

   This dialog box has the following options:

   Name - displays the test name.

   Type - displays the type of test. The last type selected is displayed first in the last.

   - **Manual Test** - manual tests are entered, performed, and kept track of manually.

   - **Test Folder** - high level descriptions for grouping tests together.

   - **Oracle OpenScript** - scripts created using Oracle OpenScript.

   - **3rd Party Test** - use this option when you want to run an executable file and capture the results.

   - **JUnit Test** - use this option when you want to run an Ant file and capture the results.

   Test File - for Oracle OpenScript tests, displays the script test file name. For 3rd Party tests, displays the file that will run. Click **Browse** to display the Select Script or Choose File dialog box for selecting the file.

   Owner - select the user that owns the test. Only users with read permission for this project are listed.

   Functionality - enter a description of the functionality being tested.

   Priority - displays the priority of the test. These options can be changed by your system administrator.

   Description - displays the test description.

   Attachment - lets you add an attachment or link to this test.

   File - lets you add an attachment to the Attachments section.

   - **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

- **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

5. Click **Browse** to display the Choose File dialog box.

6. Select the file that you want to run.

7. Select the owner and priority and enter any descriptive information in the Functionality and Description fields.

8. Click **Save**.

9. Select **Add/Edit** in the Test Steps section of the right-hand pane.

   This dialog box has the following options:

   Add - adds a new row under the selected row. When you click the tab key the test in the Action, Expected Result, and Comment fields is added to the grid. Clicking **Add** again also populates the grid.

   Delete - deletes the selected step.

   Move Up - moves the selected step up one position in the list.

   Move Down - moves the selected step down one position in the list.

   First - display the first step.

   Previous - displays the previous step.

   Next - displays the next step.

   Last - displays the last step.

   # - displays the step number.

   Action - displays the description of the action.

   Result Pattern - displays the regular expression that will be used to parse the output of the third party test, which will determine if the step passed or failed. See the Regular Expressions topic in the online help (Contents, Working with Tests, Regular Expressions) for more information on regular expressions.

   Comment - displays additional information about the step.

   Add/Edit Attachments - displays the Add Attachment dialog box for adding an attachment associated with this test step. Attachments are listed in the Test Steps section of the right-hand pane.

10. Click **Add**.

11. Enter the information in the Action, Result Pattern, and Comment fields for the step. The gird is populated when move to the next field or when you click **Add**.

12. Click **Add/Edit Attachments** to add an attachment associated with this step.

13. Click **Add** to add another step or **OK** to exit the dialog box when you are finished adding steps.

6.5 Adding JUnit Tests

> **Note:**   The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

JUnit is a unit testing framework for the Java programming language. JUnit has been important in the development of test-driven development and is one of a family of unit testing frameworks. Oracle Test Manager uses JUnit 4 and Ant. JUnit tests are run from a command-line using Ant.

Apache Ant is a Java library and command-line tool used to drive processes described in build files as targets and extension points dependent upon each other. The main usage of Ant is building Java applications. Ant supplies a number of built-in tasks allowing to compile, assemble, test and run Java applications. Ant can also be used effectively to build non Java applications, for instance C or C++ applications. More generally, Ant can be used to pilot any type of process which can be described in terms of targets and tasks.

A developer or tester creates unit test cases using JDeveloper (or any other development environment that allows unit tests). Once created, the JUnit test can be added to Oracle Test Manager. Oracle Test Manger executes the unit tests and reports the results.

The following settings are required on the system which runs JUnit test:

1. Set the Environment variable PATH to include the following:

   - JDK (C:\OracleATS\jdk\jre\bin)

   - JUnit.jar (C:\OracleATS\install\lib\junit-4.5.jar)

   - ANT (C:\OracleATS\wls\modules\org.apache.ant_1.7.1\bin)

2. Set Environment variable CLASSPATH to include the following:

   - JUnit.jar (C:\OracleATS\install\lib\junit-4.5.jar)

   - File path where class files are placed (C:\JUnit\Test\src)

3. Validate the Environment:

   - Type "java -version" at the command prompt, you should see the JVM reports

   - Validate JUnit by executing "java org.junit.runner.JUnitCore" from the command line (JUnit Version details will be displayed).

   - Type "ANT" from the command prompt and verify there are no errors. (If you see tools.jar file missing error, place the jar file under JRE/lib directory.)

4. Edit JUnit-Testfile.xml (Sample file at <OATS_HOME>\otm\junit) to include the correct classes directory path under classes.dir. Note: JUnit-Testfile.xml is the sample ANT file, which is supported by Oracle Test Manager.

5. Execute the JUnit from command prompt (<OATS_HOME>\otm\junit):

   ```
   ant -Doats.junit.reports.dir=<path to store Report> -buildfile <buildfile name>
   ```

   Example:

   ```
   ant -Doats.junit.reports.dir=C:\Temp\Rpt -buildfile junit-testfile.xml
   ```

6. Execute JUnit from Oracle Test Manager application:

- Login to Oracle Test Manager.

- Navigate to Test tab.

- Add Test: JUnit.

- Browse to the ANT file.

- Perform a QuickRun of the JUnit test.

To add a JUnit test:

1. Select the **Tests** tab.

2. Click the **Add** button.

3. Enter a name for the test.

4. Select **JUnit test** in the Type field.

   This dialog box has the following options:

   Name - displays the test name.

   Type - displays the type of test. The last type selected is displayed first in the last.

   - **Manual Test** - manual tests are entered, performed, and kept track of manually.

   - **Test Folder** - high level descriptions for grouping tests together.

   - **Oracle OpenScript** - scripts created using Oracle OpenScript.

   - **3rd Party Test** - use this option when you want to run an executable file and capture the results.

   - **JUnit Test** - use this option when you want to run an Ant file and capture the results.

   Ant File - for Oracle OpenScript tests, displays the script test file name. For 3rd Party tests, displays the file that will run. For JUnit tests, displays the Ant file that will used for the test. Click **Browse** to display the Select Script or Choose File dialog box for selecting the file.

   Owner - select the user that owns the test. Only users with read permission for this project are listed.

   Functionality - enter a description of the functionality being tested.

   Priority - displays the priority of the test. These options can be changed by your system administrator.

   Description - displays the test description.

   Attachment - lets you add an attachment or link to this test.

   File - lets you add an attachment to the Attachments section.

   - **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

   - **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

   - **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

5. Click **Browse** to display the Choose File dialog box.

6. Select the file that you want to run.

7. Select the owner and priority and enter any descriptive information in the Functionality and Description fields.

8. Click **Save**.

9. Select **Add/Edit** in the Test Steps section of the right-hand pane.

   This dialog box has the following options:

   Add - adds a new row under the selected row. When you click the tab key the test in the Action, Expected Result, and Comment fields is added to the grid. Clicking **Add** again also populates the grid.

   Delete - deletes the selected step.

   Move Up - moves the selected step up one position in the list.

   Move Down - moves the selected step down one position in the list.

   First - display the first step.

   Previous - displays the previous step.

   Next - displays the next step.

   Last - displays the last step.

   # - displays the step number.

   Action - displays the description of the action.

   Result Pattern - displays the regular expression that will be used to parse the output of the third party test, which will determine if the step passed or failed. See the Regular Expressions topic in the online help (Contents, Working with Tests, Regular Expressions) for more information on regular expressions.

   Comment - displays additional information about the step.

   Add/Edit Attachments - displays the Add Attachment dialog box for adding an attachment associated with this test step. Attachments are listed in the Test Steps section of the right-hand pane.

10. Click **Add**.

11. Enter the information in the Action, Result Pattern, and Comment fields for the step. The gird is populated when move to the next field or when you click **Add**.

12. Click **Add/Edit Attachments** to add an attachment associated with this step.

13. Click **Add** to add another step or **OK** to exit the dialog box when you are finished adding steps.

6.6 Deleting Tests

You can delete tests from the project. To delete a test or branch:

1. Select the test or branch that you want to delete.

2. Click the **Delete** button.

3. Click **Yes** when asked to confirm the deletion.

To delete multiple tests:

1. Select the tests you want to delete using SHIFT-click and CTRL-click.

2. Click **Delete**. The Delete Tests dialog box is displayed showing the selected tests.

 Selected nodes - lists the nodes that you selected. Uncheck any nodes that you do not want to delete.

 OK - deletes the selected nodes.

 Reset - checks all of the nodes.

3. Deselect any nodes that you do not want to delete.

4. Click **OK**.

6.7 Editing Tests

Note: The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

To edit tests:

1. Select the test you want to change.

2. Click **Edit**.

 This dialog box has the following options:

 Name - displays the test name.

 Type - displays the type of test. The last type selected is displayed first in the last.

 - **Manual Test** - manual tests are entered, performed, and kept track of manually.

 - **Test folder** - high level descriptions for grouping tests together.

 - **Oracle OpenScript** - scripts created using Oracle OpenScript.

 - **3rd Party Test** - use this option when you want to run an executable file and capture the results.

 - **JUnit Test** - use this option when you want to run an Ant file and capture the results.

 Repository - for OpenScript scripts, specifies the repository where the script is located. Click **Find** to display the Select Script dialog box for selecting the script file.

 Workspace - for OpenScript scripts, specifies the workspace where the script is located. When you select a script using **Find**, the workspace will be filled in automatically.

 Test File - for 3rd Party tests, displays the script test file name. Click **Browse** to display the Choose File dialog box for selecting the test file.

 Owner - select the user that owns the test. Only users with read permission for this project are listed.

 Functionality - displays the description of the functionality the test is designed to verify.

 Priority - displays the priority of the test. These options can be changed by your system administrator.

Description - displays the test description.

3. Make any changes.

4. Click **Save**.

5. To edit test step page titles or comments, or to add an attachment to a test step click **Add/Edit** in the Test Steps section of the right-pane.

6. Make any changes.

7. Click **OK**.

6.8 Editing Multiple Tests

You can edit several tests at the same time if you want to make the same change to them all. To edit multiple tests:

1. Select the tests you want to edit.

2. Select **Edit Test** from the right-click menu.

    Selected nodes - lists the selected nodes. Deselect nodes that you do not want to edit.

    Fields - the fields listed are determined by the type of node and whether there are any custom fields.

    Check Box - select the check box to change the field's value. The change will be applied to all of the selected nodes.

3. Deselect any nodes that you do not want to change.

4. Select a field that you want to change.

5. Select or enter the new value. The change will be made to all of the selected nodes.

6. Repeat for all fields that you want to change.

7. Click **Save**.

6.9 Editing Manual Test Steps

To edit test steps for a manual test:

1. Select the test for which you want to edit test steps.

2. Select **Add/Edit** in the Test Steps section of the right-hand pane.

    This dialog box has the following options:

    Add - adds a new row under the selected row. When you click the tab key the test in the Action, Expected Result, and Comment fields is added to the grid. Clicking **Add** again also populates the grid.

    Delete - deletes the selected step.

    Move Up - moves the selected step up one position in the list.

    Move Down - moves the selected step down one position in the list.

    First - display the first step.

    Previous - displays the previous step.

    Next - displays the next step.

    Last - displays the last step.

- displays the step number.

Action - displays the action to perform.

Expected Result - displays a description of what is expected to happen as a result of this step.

Comment - displays additional information about the step.

Add/Edit Attachments - displays the Add Attachment dialog box for adding an attachment associated with this test step. Attachments are listed in the Test Steps section of the right-hand pane.

3. Make any changes.

4. Click **OK**.

6.10 Converting Tests

You can convert manual test case nodes to Oracle OpenScript test case nodes. Oracle Test Manager maintains the test case definition and results and allows you to replace the manual test steps with Oracle OpenScript scripts. To convert a manual test:

1. Select the test you want to convert and click **Edit**. The Edit Test dialog box is displayed.

2. Select Oracle OpenScript in the **Type** field.

3. Select the test file that you want to use.

4. Click **OK** when asked if you are sure that you want to convert the test type. The Convert test type dialog box is displayed.

   Save a copy of the selected Manual Test Case - saves both the converted test case and the original test case.

   Save the prior results history with the new Oracle Functional Testing Test Case - saves the prior results history with the new test.

5. Select the options and click **OK**.

6. Click **Save**.

6.11 Viewing Test Details

You can view the result details for each test run. To view test details:

1. Click the **Tests** tab.

2. Select the test for which you want to view details.

3. In the Run History section of the right pane, click the date of the test for which you want to view details. The Test Set Run History is only included if the **Include Test Set Runs in Tests Tab** option is selected in the **Right Hand Pane Display** section of the user options (select **Options** from the **Tools** menu).

   The details of the test run expand and appear under the Run History section.

6.12 Associating Requirements With Tests

There are two ways to associate tests with requirements. You can search for tests that contain designated values in one or more fields or you can select tests from a tree view.

To associate requirements with a test using search:

1. Select the test with which you want to associate requirements.

2. Select **Add/Edit** from the Associated Requirements section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - displays whether you are searching requirements, tests, or issues.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     Severity = High)
     ```

   <left parenthesis> - select the left parenthesis up to three.

   Field - select the field that you want to use to select the items to display.

   Operator

   - **Equals** - causes only items that match the value for the selected field to be displayed.

   - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

   Value - enter or select the value of the field that you want to use to select the items to display.

   <right parenthesis> - select the right parenthesis up to three.

   <operator> - select the operator to use, AND or OR.

   <delete> - deletes the corresponding criteria.

   <expression> - shows the filtering expression you are creating as you select criteria.

   Results - displays the nodes that match the search criteria.

   - **Select** - places the selected nodes in the **Associated Nodes** field.

   - **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the selected nodes.

   - **Remove** - removes the selected nodes from the **Associated Nodes** field.

   - **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the requirements you want associated with this test or click **Select All** to associate all requirements that matched the search criteria.

5. Click **OK**. The requirements will be listed in the right pane under associated requirements.

To associate requirements with a test using the tree view:

1. Select the test with which you want to associate requirements.

2. Select **Add/Edit** from the Associated Requirements section of the right pane.

   <test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

   ■　**Select** - places the selected test in the **Associated Nodes** field.

   ■　**Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the selected nodes.

   ■　**Remove** - removes the selected nodes from the **Associated Nodes** field.

   ■　**Remove All** - removes all nodes from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the requirements you want associated with this test or click **Select All** to associate all requirements that matched the search criteria.

4. To remove nodes from the Associated Nodes field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The requirements will be listed in the right pane under associated requirements.

6.13 Associating Issues With Tests

There are two ways to associate issues with tests. You can search for issues that contain designated values in one or more fields or you can select issues from a tree view.

To associate issues with a test using search:

1. Select the test with which you want to associate issues.

2. Select **Add/Edit** from the Associated Issues section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - displays whether you are searching requirements, tests, or issues.

   that match - select how to apply the filtering criteria.

- **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

- **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

- **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

  ```
  (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
  Severity = High)
  ```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the issues you want associated with the test and click **Select** or click **Select All** to associate all issues that matched the search criteria.

5. Click **OK**. The issues will be listed in the right pane under associated issues.

To associate issues with a test using the tree view:

1. Select the test with which you want to associate issues.

2. Select **Add/Edit** from the Associated Issues section of the right pane.

<test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

- **Select** - places the selected test in the **Associated Nodes** field.

- **Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Select the issues you want associated with the test and click **Select** or click **Select All** to associate all issues that matched the search criteria.

4. To remove nodes from the Associated Nodes field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The issues will be listed in the right pane under associated issues.

6.14 Emailing Tests

You can email a test to one or more people. For email to work, the SMTP server must be configured using the Oracle Test Manager Administrator. To email a test:

1. Click the **Tests** tab.

2. Select the test that you want to email and click **Email**.

   Send to - enter the email addresses of the people to whom you want to email this test. Separate email addresses by a comma.

   To - displays the Select Email recipients dialog box for selecting recipients from a list.

   Subject - enter the text that you want to appear in the subject of the email. The default includes the name and id of the test.

   Message - enter the text that you want to appear in the message.

3. Enter the recipient email addresses separated by a comma or click **To** to display the Select Email Recipients dialog box.

   <recipient list> - lists users in you database that have email notification enabled.

   Select - adds the selected recipients to the To field.

   To - displays the selected recipients separated by a comma.

4. Select the recipients that you want to receive the test and click Select. Note that only users in your database that have email notification enabled are listed in the dialog box.

5. Click **Done** when you are finished.

6. Change the subject if necessary.

7. Enter a message if necessary.

8. Click **OK**.

6.15 Scheduling Tests

You can schedule Oracle OpenScript tests to run once on a specified day and time, daily at a specified time, and weekly at a specified day and time.

6.15.1 Adding Tasks to the Schedule

To add a task to the schedule:

1. Click the **Schedule** button or right-click the test you want to schedule and select **Schedule test**. If you used the right-click menu, the New Task dialog box is displayed with the selected test in the **Tests** field, otherwise, the Schedule dialog box is displayed.

   New Task - displays the New Task dialog box for adding a new task to the schedule.

   System - select the system on which you want to run tasks.

   Schedule Area - lists the tasks that are scheduled for the displayed week. The week is displayed from Sunday to Saturday and defaults to the current week.

   - **Prev** - displays the previous week.

   - **Next** - displays the next week.

   - **Run Time** - displays the time that the task is scheduled to run.

   - **Task Name** - displays the name of the task.

   - **Status** - displays the task's status.

   Task Detail - click on a task name to display details about this task.

   - **Navigate** - displays the test in the right pane of the main window.

   - **Preview** - displays the test in a separate window.

   - **Run Now** - this button is available for tests that have not been executed. Runs the test immediately.

   - **Edit** - displays the Edit Task dialog box for changing the task.

   - **Clone** - displays the Edit Task dialog box with the same configuration as the selected task.

   - **Delete** - deletes the task from the schedule.

   Calendars - shows the current and next month with the displayed week highlighted. Click on a day in the calendar to display that week.

   - **Left arrow** - moves the calendars back one month.

   - **Right arrow** - moves the calendars forward one month.

2. Select the day for which you want to schedule a task and click **New task** in the Day column or click **New task** in the top left of the screen.

   Name - enter a name for this task.

   System - select the system on which you want to run this task.

   Description - enter a description of this task.

   Start Date - select the date and time at which you want to start this task. Tasks can be scheduled on the hour, quarter past the hour, on the half our, and quarter to the hour.

Recurrence - lets you specify when and how often to run this task.

- **Run once** - runs the task once at the specified date and time.

- **Run daily** - runs the task every day at the specified time.

- **Run weekly** - runs the task every week on the specified day and time.

- **<days>** - these options are only displayed when you select Run weekly. Select the day on which you want to run the task.

End Date - specify the day on which you want this task to stop running.

Clear Date - blanks out the End Date field.

OpenScript tests - specifies how the command line settings are use when running OpenScript tests.

- **Command line run settings** - specifies the OpenScript command line options to use.

- **Override** - when selected, the specified command line options will override the command line run settings specified in for any particular OpenScript test specified in Oracle Test Manger.

- **[commands]** - specifies the command line options. See the Appendix A of the *OpenScript User Guide* for additional information about command line options.

Tests - displays the tests that are scheduled.

- **Add** - displays the Test dialog box for selected tests.

- **Delete** - deletes the selected test.

- **Move Up** - moves the selected test up one spot in the list.

- **Move Down** - moves the selected test down one spot in the list.

Run Parameters

- **Run Name** - specifies a name to associate with the scheduled test run.

- **Version** - select the version of software you are testing.

- **Send report to** - enter the email addresses of the people you want to send the report to after the schedule is executed or click the **To** button to display the Select Email Recipients dialog box for selecting email recipients in your database that have email notification enabled. Separate email address with a comma.

3. Enter a name for the task.

4. Select the system on which to run the task.

5. Enter a description of the task.

6. Select the start date and time, and how often you want to run the task.

7. Select what to do when a task is scheduled to run when another task is still running.

8. Click **Add** to add tests to the task. The same test can be added multiple times.

   There are two ways to select tests. You can search for tests that contain designated values in one or more fields or you can select tests from a tree view.

   Find Tab Fields

Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

Delete - deletes the selected saved filter.

Search for - displays whether you are searching requirements, tests, or issues.

that match - select how to apply the filtering criteria.

- **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

- **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

- **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

  ```
  (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
  Severity = High)
  ```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> -select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the tests that match the search criteria.

- **Select** - places the selected tests in the **Selected Test** field.

- **Select All** - places all tests in the **Results** field in the **Selected Test** field.

Tree View Fields

<test list> - double click tests to add and delete them from the list of selected tests or select the tests you want to add and click **Select**.

- **Select** - places the selected test in the **Selected Test** field.

- **Select All** - places all tests in the **Results** field in the **Selected Test** field.

Common Fields

Selected Tests - displays the selected tests.

- **<up arrow>** - moves the selected test up one place.
- **<down arrow>** - moves the selected test down one place.
- **Remove** - removes the selected tests from the **Selected Test** field.
- **Remove All** - removes all tests from the **Selected Test** field.

9. Select the tests that you want to schedule.

10. Click **OK**.

11. Use the Move Up and Move Down buttons to put the tests in the order in which you want them to run.

12. Click **Save**.

13. To test the task, click the task that you want to test, then click **Run Now**.

14. Click **Close** to exit the Schedule dialog box.

6.15.2 Editing Tasks

To edit a task:

1. Click the **Schedule** button.

2. Click the task that you want to edit. Details about the task are displayed.

3. Click the **Edit** button.

4. Make any changes.

5. Click **Save**.

6. To test the task, click the task that you want to test, then click **Run Now**.

7. Click **Close** to exit the Schedule dialog box.

6.15.3 Deleting Tasks

To delete a task:

1. Click the **Schedule** button.

2. Click the task you want to delete.

3. Click **Delete**.

4. Click **Yes** when asked to confirm the deletion.

7

Executing Tests

Tests can be grouped together into branches for easy management. Once entered, they can be associated with the requirements they address or any issues that result from running the test.

When you run a test, you can specify the workstation to run it on. Workstations are configured using the Systems Manager. To run Oracle OpenScript tests on remote systems, you must also install the Oracle Application Testing Suite Remote Agent on the remote system and configure Remote Agent Service login credentials. See the "Installing the Oracle Load Testing Remote Agent" section in the *Oracle Application Testing Suite Installation Guide* for additional information about installing the agent and configuring the login credentials.

In addition, tests can be scheduled to run once at a specified day and time, daily at a specified time, or weekly at a specified day and time.

7.1 Adding Test Set Folders

Test Set Folders can be used to group test sets. Test Set Folders are automatically numbered when you enter them. You can reorder them using the Move buttons. To add a test folder:

1. Select the **Test Execution** tab.

2. Click the **Add** button.

3. Enter a name for the test folder.

4. Select **Test Folder** in the Type field.

   This dialog box has the following options:

   Name - displays the folder or test set name.

   Type - displays the type, as follows:

   - **Test Folder** - high level descriptions for grouping test sets together.

   - **Test Set** - a list of tests that are sequentially run together that can also be scheduled. In addition, the overall results are tracked and displayed.

   Owner - select the user that owns the folder. Only users with read permission for this project are listed.

   Functionality - enter a description of the functionality being tested.

   Priority - displays the priority of the folder. These options can be changed by your system administrator.

   Description - displays the folder description.

Attachment - lets you add an attachment or link to this folder.

File - lets you add an attachment to the Attachments section.

- **Browse** - displays the Choose File dialog box for selecting the file to attach.

Link - lets you add a link to the Links section.

- **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

Reset - clears the fields and returns the dialog box options to the starting state.

5. Enter a description of the functionality of the folder.

6. Select the owner and priority and enter any descriptive information in the **Functionality** and **Description** fields.

7. Add any attachments.

8. Click **Save**.

7.2 Adding Test Sets

Test Sets specify the tests to execute. Test Sets are automatically numbered when you enter them. You can reorder them using the Move buttons. To add a test set:

1. Select the **Test Execution** tab.

2. Click the **Add** button.

3. Enter a name for the test set.

4. Select **Test Set** in the Type field.

   This dialog box has the following options:

   Name - displays the test name.

   Type - displays the type, as follows:

   - **Test Folder** - high level descriptions for grouping test sets together.

   - **Test Set** - a list of tests that are sequentially run together that can also be scheduled. In addition, the overall results are tracked and displayed.

   Owner - select the user that owns the test set. Only users with read permission for this project are listed.

   Functionality - enter a description of the functionality being tested

   Priority - displays the priority of the test set. These options can be changed by your system administrator.

   Description - displays the test set description.

   Attachment - lets you add an attachment or link to this test set.

   File - lets you add an attachment to the Attachments section.

   - **Browse** - displays the Choose File dialog box for selecting the file to attach.

   Link - lets you add a link to the Links section.

   - **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

Reset - clears the fields and returns the dialog box options to the starting state.

5. Enter a description of the functionality of the folder.

6. Select the owner and priority and enter any descriptive information in the **Functionality** and **Description** fields.

7. Add any attachments.

8. Click **Save**.

7.3 Adding Tests to a Test Set

Once you have created a Test Set, you can add tests to it. Oracle OpenScript tests and manual test can be added to a Test Set. The same test can be added more than once. The tests in the group are run sequentially, and the group can also be scheduled. To add tests:

1. Click the **Test Execution** tab.

2. Select the Test Set to which you want to add tests.

3. In the right pane, click **Add/Edit** in the Test List area to display the Tests dialog box. There are two ways you can select tests. You can search for them or select them from the tree view.

To select tests by searching for them:

1. Click the **Find** tab.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - displays whether you are searching requirements, tests, or issues.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     Severity = High)
     ```

   <left parenthesis> - select the left parenthesis up to three.

   Field - select the field that you want to use to select the items to display.

   Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Selected Tests** field.

- **Select All** - places all nodes in the **Results** field in the **Selected Tests** field.

Selected Tests - displays the selected nodes.

- **<up arrow>** - moves the selected test up one place.

- **<down arrow>** - moves the selected test down one place.

- **Remove** - removes the selected nodes from the **Selected Tests** field.

- **Remove All** - removes all nodes from the **Selected Tests** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

2. Enter the search criteria or select a saved filter and click **Search**.

3. Select the tests you want to add or click **Select All** to add them all.

4. Click **OK**.

To select tests using the tree view:

1. Click the **TreeView** tab.

   <test list> - double click tests to add and delete them from the list of selected tests or select the tests you want to add and click **Select**.

   - **Select** - places the selected test in the **Selected Tests** field. The **Select** button is enabled only when a test node (non-folder node) is selected. The **Select All** button will be disabled.

   - **Select All** - places all tests under the folder selected in the tree view in the **Results** field in the **Selected Tests** field. The **Select All** button is enabled only when a test folder is selected in the tree view. When you click **Select All**, the tests under the selected folder and any sub-folders will be added to the Test Set. The **Select All** button will then be disabled until you select any folder again to avoid clicking twice and accidentally adding a test folder twice.

   Selected Tests - displays the selected nodes.

   - **Remove** - removes the selected nodes from the **Selected Tests** field.

   - **Remove All** - removes all nodes from the **Selected Tests** field.

   OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

2. Select each test you want to add and click **Select** or select a test folder and click **Select All** to add all tests under the selected folder. If you select a test folder and click **Select All**, you must select a test folder in the tree to re-enable the **Select All** button.

3. To remove nodes from the Selected Tests field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

4. Click **OK**.

7.4 Associating Requirements With Test Sets

There are two ways to associate test sets with requirements. You can search for test sets that contain designated values in one or more fields or you can select tests from a tree view.

To associate requirements with a test using search:

1. Select the test set with which you want to associate requirements.

2. Select **Add/Edit** from the Associated Requirements section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - displays whether you are searching requirements or issues.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     Severity = High)
     ```

   <left parenthesis> - select the left parenthesis up to three.

   Field - select the field that you want to use to select the items to display.

   Operator

   - **Equals** - causes only items that match the value for the selected field to be displayed.

   - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the requirements you want associated with this test set or click **Select All** to associate all requirements that matched the search criteria.

5. Click **OK**. The requirements will be listed in the right pane under associated requirements.

To associate requirements with a test set using the tree view:

1. Select the test with which you want to associate requirements.

2. Select **Add/Edit** from the Associated Requirements section of the right pane.

   <test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

   - **Select** - places the selected test in the **Associated Nodes** field.

   - **Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the selected nodes.

   - **Remove** - removes the selected nodes from the **Associated Nodes** field.

   - **Remove All** - removes all nodes from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the requirements you want associated with this test or click **Select All** to associate all requirements that matched the search criteria.

4. To remove nodes from the Associated Nodes field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The requirements will be listed in the right pane under associated requirements.

7.5 Associating Issues With Test Sets

There are two ways to associate issues with test sets. You can search for issues that contain designated values in one or more fields or you can select issues from a tree view.

To associate issues with a test set using search:

1. Select the test set with which you want to associate issues.

2. Select **Add/Edit** from the Associated Issues section of the right pane.

    Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

    Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

    Delete - deletes the selected saved filter.

    Search for - displays whether you are searching requirements or issues.

    that match - select how to apply the filtering criteria.

    - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

    - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

    - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

      ```
      (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
      Severity = High)
      ```

    <left parenthesis> - select the left parenthesis up to three.

    Field - select the field that you want to use to select the items to display.

    Operator

    - **Equals** - causes only items that match the value for the selected field to be displayed.

    - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

    Value - enter or select the value of the field that you want to use to select the items to display.

    <right parenthesis> - select the right parenthesis up to three.

    <operator> - select the operator to use, AND or OR.

    <delete> - deletes the corresponding criteria.

    <expression> - shows the filtering expression you are creating as you select criteria.

    Results - displays the nodes that match the search criteria.

    - **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the issues you want associated with the test and click **Select** or click **Select All** to associate all issues that matched the search criteria.

5. Click **OK**. The issues will be listed in the right pane under associated issues.

To associate issues with a test using the tree view:

1. Select the test set with which you want to associate issues.

2. Select **Add/Edit** from the Associated Issues section of the right pane.

   <test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

   - **Select** - places the selected test in the **Associated Nodes** field.

   - **Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the selected nodes.

   - **Remove** - removes the selected nodes from the **Associated Nodes** field.

   - **Remove All** - removes all nodes from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the issues you want associated with the test and click **Select** or click **Select All** to associate all issues that matched the search criteria.

4. To remove nodes from the Associated Nodes field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The issues will be listed in the right pane under associated issues.

7.6 Associating Test Plans With Test Sets

There are two ways to associate test plans with test sets. You can search for test plans that contain designated values in one or more fields or you can select test plans from a tree view.

To associate test plans with a test set using search:

1. Select the test set with which you want to associate test plans.

2. Select **Add/Edit** in the Associated Test Plans section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

Search for - displays whether you are searching issues, requirements, tests, test plans, or test sets.

that match - select how to apply the filtering criteria.

- **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

- **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

- **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

  ```
  (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
  Severity = High)
  ```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the test plans that you want to associate and click **Select** or click **Select All** to associate all test plans that matched the search criteria.

5. Click **OK**. The test plans are listed in the right pane under associated test plans.

To associate test plans with a test set using the tree view:

1. Select the test set with which you want to associate test plans.

2. Select **Add/Edit** in the Associated Test Plans section of the right pane.

   <test list> - double click test plans to add and delete them from the list of associated test plans or select the test plans you want to add and click **Select**.

   - **Select** - places the selected test plan in the **Associated Nodes** field.

   - **Select All** - places all test plans in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the test plans that are associated with this test set.

   - **Remove** - removes the selected test from the **Associated Nodes** field.

   - **Remove All** - removes all tests from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the test plans you want associated with this test set and click **Select** or click **Select All** to associate all test plans.

4. To remove nodes from the **Associated Nodes** field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The test plans will be listed in the right pane under associated test plans.

7.7 Emailing Test Sets

You can email a test set to one or more people. For email to work, the SMTP server must be configured using the Oracle Test Manager Administrator. To email a test:

1. Click the **Test Execution** tab.

2. Select the test set that you want to email and click **Email**.

   Send to - enter the email addresses of the people to whom you want to email this test. Separate email addresses by a comma.

   To - displays the Select Email recipients dialog box for selecting recipients from a list.

   Subject - enter the text that you want to appear in the subject of the email. The default includes the name and id of the test.

   Message - enter the text that you want to appear in the message.

3. Enter the recipient email addresses separated by a comma or click **To** to display the Select Email Recipients dialog box.

   <recipient list> - lists users in you database that have email notification enabled.

   Select - adds the selected recipients to the To field.

   To - displays the selected recipients separated by a comma.

4. Select the recipients that you want to receive the test and click Select. Note that only users in your database that have email notification enabled are listed in the dialog box.

5. Click **Done** when you are finished.

6. Change the subject if necessary.

7. Enter a message if necessary.

8. Click **OK**.

7.8 Configuring Systems

The Systems Manager lets you configure the systems on which you will be running tests. When you run or schedule a test, you can specify the workstation on which to run the test.

7.8.1 Adding Systems

To add a system:

1. Select **Systems** from the **Tools** menu. The Systems Manager dialog box is displayed.

   New - displays the Systems dialog box for adding a new system.

   Edit - displays the Systems dialog box for editing the selected system.

   Delete - deletes the selected system.

   Name - lists the configured systems.

2. Click **New**.

   Name - enter the system's name.

   Host Name or IP - enter the system's host name or IP address.

   Username - enter the user name for agent authentication. The Username is the user name specified for the agent Authentication Profile in the Oracle Load Testing Agent Authentication Manager. The username for the default agent Authentication Profile is `JMSAdmin`. To view other defined agent Authentication Profile Usernames, select **Oracle Application Testing Suite** from the **Programs** Start menu, then select **Oracle Load Testing Agent Authentication Manager** from the **Tools** submenu. Select an agent Authentication Profile to view the details. On Linux machines, use:

   ```
   <instdir>/jdk/jre/bin/javaw -jar <instdir>/agentmanager/AMAuthManager.jar
   ```

   to start the **Oracle Load Testing Agent Authentication Manager**.

   Password - enter the password for agent authentication. The Password is the password specified for the agent Authentication Profile in the Oracle Load Testing Agent Authentication Manager. The password for the default agent Authentication Profile is blank. To change the password for a defined agent Authentication Profile Usernames, start the **Oracle Load Testing Agent Authentication Manager** and select an agent Authentication Profile to view the details and enter a new password.

   Port - enter the port.

   Test - attempts to access the system and displays a message stating whether the system is available.

> **Note:** If a firewall is running on the agent system, you must make sure Port 7 is open. The controller uses Port 7 to ping the agent system to determine if the system can be accessed or not while adding the agent system using the user interface.

3. Enter the system's name.

4. Enter the system's host name or IP address.

5. Change the default port, if necessary.

6. Click **Test** to see if the system is available.

7. Click **OK** to close the test result window.

8. Click **OK**.

7.8.2 Editing Systems

To edit a system:

1. Select **Systems** from the **Tools** menu.

    New - displays the Systems dialog box for adding a new system.

    Edit - displays the Systems dialog box for editing the selected system.

    Delete - deletes the selected system.

    Name - lists the configured systems.

2. Select the system that you want to change.

3. Click **Edit**.

    Name - enter the system's name.

    Host Name or IP - enter the system's host name or IP address.

    Username - enter the user name for agent authentication.

    Password - enter the password for agent authentication.

    Port - enter the port.

    Test - attempts to access the system and displays a message stating whether the system is available.

4. Make any changes.

5. Click **Test** to see if the system is available.

6. Click **OK** to exit the test result window.

7. Click **OK**.

7.8.3 Deleting Systems

To delete a system:

1. Select **Systems** from the **Tools** menu.

2. Select the system you want to delete.

3. Click **Delete**.

4. Click **Yes** when asked to confirm the deletion.

7.9 Running Tests

You can individually run manual tests, Oracle OpenScript functional tests, third party, JUnit, or Test Sets. You can run individual tests in the **Tests** tab using the **Run Test** option on the right-click shortcut menu. You can run groups of tests in a Test Set in the **Test Execution** tab after creating a Test Set and adding one or more tests to the Test Set.

7.9.1 Running Oracle OpenScript Functional Tests

To run an individual Oracle OpenScript test:

1. Make sure you have added an OpenScript test to the test tree. See Section 6.1, "Adding Oracle OpenScript Scripts" for additional information about adding OpenScript tests.

2. Select the **Test** tab.

3. Select the test you want to run.

4. Select **Run Test** from the right-click shortcut menu.

   This dialog box has the following options:

   System - select the system on which you want to run this test. Systems are configured using the Systems Manager.

   Run Name - specify a name to use to identify this test run.

   Version - select the version of the test or select Other to enter a version that is not in the list.

   Command line run settings - specify any additional arguments or command line settings to use when running an Oracle OpenScript script. See the *Oracle OpenScript User's Guide* for additional information about using command line settings.

   > **Note:** If your administrator has created Test Run custom fields, they will appear in this dialog box.

5. Select the system on which you want to run the test.

6. Change or update the Run Name.

7. Select the version number against which the test will run.

8. Specify any run settings and click **Run**. The script is started and plays back in the agent.

9. Click **Refresh** to show the results in the Run History section of the right pane. Click the date in the Run History field to display result parameters, summary and detail information. Click **View Report** in the Result Summary section to view the Results Report.

The following additional steps are required in order to run the following types of OpenScript scripts from Oracle Test Manager:

■ Siebel Functional

■ Oracle Forms Functional

■ Web Functional scripts that rely on system input events, such as key press or mouse click

- Web Functional scripts that display modal dialog windows

It is necessary to run these scripts using an interactive desktop of a named Windows user account that is always logged in. See also "Command-Line Script Execution" in the Release Notes for additional information.

1. For Siebel and Oracle Forms, the named user's account must have visited the Siebel or Oracle Forms site at least once to ensure that all necessary ActiveX controls and plug-ins are installed in the named user's browser.

2. On the Oracle Test Manager agent machine that will run the scripts, stop the "Oracle Application Testing Suite Agent Service" and configure it to start manually.

3. On the Oracle Test Manager agent machine, login as the named Windows user account that will run the scripts. From a command prompt, run the following:

   Windows:

   ```
   $installDir\agentmanager\bin\agentmanager.cmd
   ```

   Linux:

   ```
   $installDir\agentmanager\bin\agentmanager.sh
   ```

   This command starts a Java executable running the agentmanager, it will not "run" the service. All output is logged to the agentmanager.log and the logs of individual agents.

   > **Note:** For Windows 7 systems, the command must be run using the elevated command line. From the Start menu, expand the Accessories, right click on the Command Prompt menu option and select **Run as administrator** from the shortcut menu.

4. The named user account must remain logged into the system at all times that scripts will be run.

7.9.1.1 Viewing the Agent Queue Status

When executing OpenScript tests, Oracle Test Manager checks if the requested agent system is available. If the agent system is available, the test will be scheduled to run immediately. If the agent system is not available the test is added to the agent queue until the agent system resource is available. Any test or testset scheduled to run at a specific time will be put into the queue when the scheduled time comes. This means that if a test or testset was scheduled for execution at 1pm, it will be added to the queue at 1pm. If other tests are also in the queue, the test or testset scheduled for 1pm may have to wait until resources become available before execution actually begins. See Section 2.10.2, "The Agent Queue" for additional information.

To check the status of the agent queue, click the **Queue** icon on the Toolbar of the Test or Test Execution tabs. The agent queue status dialog box shows a list of the testsets or test scripts that have been added to the agent queue. This dialog box has the following options:

Waiting Queue - displays the status of the agent queue and any testsets or test scripts waiting in the queue.

- **Delete** - removes the selected testset or test script from the agent queue. Deleting test sets or test script from the agent queue requires administrator user privileges.

Running Tests

- **Icon** - displays the icon for either a testset or test script to identify the type of test waiting in the queue.

- **Testset** - displays the name of the testset that was submitted for execution and is now in the agent queue awaiting execution. Testsets appear in the queue as one object; however, when the execution time comes, all the tests within the testset will be executed in the order they are specified within the testset.

- **Test** - displays the name of the test script that was submitted for execution and is now in the agent queue awaiting execution.

- **User/Scheduler** - displays the name of the tester who submitted the testset or test script to be executed in Oracle Test Manager or "Scheduler" if the testset or test script was initiated by the scheduler.

- **Submitted on** - displays the date and time the testset or test script was submitted for execution.

Running Queue - display the status of testsets or test scripts currently running on the available agents.

- **Release** - releases the selected agent from the running test. Releasing agents from the agent queue requires administrator user privileges.

- **Icon** - displays the icon for either a testset or test script to identify the type of test running on the agent.

- **Run Name** - displays the testset run name if the running test is a testset. This column is blank if the running test is a single test script.

- **Testset** - displays the name of the testset running on the agent.

- **Test** - displays the name of the test script running on the agent.

- **User/Scheduler** - displays the name of the tester who submitted the testset or test script to be executed in Oracle Test Manager or "Scheduler" if the testset or test script was initiated by the scheduler.

- **Agent** - displays the name of the agent system running the testset or test script.

7.9.2 Running Manual Tests

To run an individual manual test:

1. Make sure you have added a manual test to the test tree. See Section 6.2, "Adding Manual Tests" for additional information about adding manual tests.

2. Select the **Test** tab.

3. Select the test you want to run.

4. Click **Run Test** from the right-click shortcut menu.

   This dialog has the following options:

   Run Name - specify a name to use to identify this test run.

   Version - select the version of the test or select Other to enter a version that is not in the list.

   > **Note:**   If your administrator has created Test Run custom fields, they
   > will appear in this dialog box.

Executing Tests   **7-15**

5. Change or update the Run Name.

6. Enter or select the version number and click **Run**.

This dialog box appears for each step in the test. It has the following options:

First - displays the first step.

Previous - displays the previous step.

Next - displays the next step.

Last - displays the last step.

Minimize/Maximize - toggles the size of the dialog box.

Start Timer - starts the timer. When the timer is on, it keeps track of how long it took to run each step and the complete test. The Duration and Iteration Total Time fields in the Result Detail Section will be populated.

Stop Timer - stops the timer. The Duration field in the Result Detail Section will be populated for the steps that were completed.

Make All - sets the result of all steps to the selected status, either Passed, Failed, Warning, or any user-defined field configured for the Status field in the Administrator.

Action - displays the action to perform.

Expected Result - displays the expected result.

Comment - displays additional information about the step.

Attachments - lists the attachments associated with this step.

Result - select the outcome of the step after performing it.

Add Issue - opens the adds issue dialog box with pre-filled data about the current test step.

[Autosave indicators] - shows the current autosave status of the test step. A blue check mark indicates the last change to the test step status has been saved. A green check mark with a timer icon indicates the autosave for the current test step status is pending.

- A backup copy of test steps data is saved when the Run Manual Test window opens to run a manual test case.

- Changes are posted in the database when any test step data (either comments or result) is changed.

- Changes made using the **Make All** selection drop down are posted in the database.

- When **Complete Test Run** or **Save for Later** is clicked.

- If **Cancel** is clicked, the data is reverted to the backup copy created when the Run Manual Test window was opened.

Complete Test Run - opens the Run Manual Test - Summary for setting the completed manual test status. Set the result and click **OK**.

Save for Later - saves the test run status and shows a result of In Progress in the Run History section for this test run. Click **Resume this run** to resume testing.

7. Click the Start Timer button if you want Oracle Test Manager to keep track of how long it takes to complete each step. If you are using the timer the Duration and Iteration Total Time fields in the Result Detail Section will be populated. If you

stop the timer or save the run only the Duration field will be populated for the completed steps.

8. Perform each step and select the result or use **Make All** to set the same result for each step.

9. Click **Save for Later** to save the results for the completed steps without finishing the test run or click **Complete Test Run** when you are done. You can continue a **Save for Later** test by clicking the Run Test button in the Run History section to resume the test.

   Result - enter the overall outcome of the test.

   Summary - enter additional information about the test.

10. If you click **Complete Test Run**, select the overall test result, enter any summary comments, and click **OK**.

7.9.3 Running Test Sets

When you run a Test Set, Oracle Test Manager runs the tests in the set in sequence. The same test can be added multiple times.

To run a Test Set:

1. Make sure you have added a Test Set to the test tree and have added the tests you want to run to the Test Set. See Section 7.2, "Adding Test Sets" for additional information about adding Test Sets. See Section 7.3, "Adding Tests to a Test Set" for additional information about adding tests to run to a Test Set.

2. Select the **Test Execution** tab.

3. Select the Test Set and click **Create run** at the top of the right pane.

4. Change or update the Run Name.

5. Enter the version number of the test set.

6. Specify any additional arguments or command line settings to use when running an Oracle OpenScript script. See the *Oracle OpenScript User's Guide* for additional information about using command line settings.

7. Click **Save**.

8. The Test Set run is added to the Run History section.

   You can run individual tests by clicking the **Run Test** icon next to the individual test in the Test List. You can also set the result for all tests in the test set using the **Set result** link on the **Actions** menu. When finished running tests individually, select **Complete this run** on the **Actions** menu, then click **OK** to confirm. The status of the Test Set is updated in the Run History. Note that once a Test Set is completed, it is no longer editable.

   You can run a complete Test Set by clicking the **Launch** link on the **Actions** menu in the Test List. Clicking the **Launch** link executes all non-manual tests, however, manual tests must still be executed one-by-one by clicking the **Run Test** button for each test.

7.9.3.1 Adding and Removing Tests in a Test Set Run

You can add or remove tests from an existing Test Set run that has a status of incomplete. Only tests that are included in the Test Set can be added to or removed from the Test Set run.

To add or remove tests in a Test Set run:

1. Make sure you have created a Test Set, created a Test Set run using **Create Run**, and the Test List for the Test Run appears in the right pane of the **Test Execution** tab.

2. Click **Add/Remove Tests to this run** in the Test List section.

3. Add tests to or remove tests from the Test Set run, as follows:

   ■ Add tests to the Test Set run by selecting one or more tests in the **Test Cases available in Test Set** list and clicking **Select** or **Select All**.

   ■ Remove tests from the Test Set run by selecting the one or more tests in the **Selected Tests** list and clicking **Remove** or **Remove All**. Click **OK** to confirm.

4. Click **OK** when finished adding or removing tests in the Test Set run.

7.9.4 Running Third-Party Tests

To run third-party tests:

1. Make sure you have added a third-party test to the test tree. See Section 6.4, "Adding Third Party Tests" for additional information about adding third party tests.

2. Select the **Test** tab.

3. Select the test you want to run.

4. Select **Run Test** from the right-click shortcut menu.

   This dialog box has the following options:

   System - select the system on which you want to run this test. Systems are configured using the Systems Manager.

   Run Name - specify a name to use to identify this test run.

   Version - select the version of the test or select Other to enter a version that is not in the list.

   > **Note:**   If your administrator has created Test Run custom fields, they will appear in this dialog box.

5. Select the system on which you want to run the test.

6. Change or update the Run Name.

7. Select the version number against which the test will run and click **Run**.

8. A message stating that the test is running is displayed. A command line window is displayed showing the batch file execution.

9. Click **Refresh** to show the results in the Run History section of the right pane.

7.9.5 Running JUnit Tests

To run a JUnit test:

1. Make sure you have added a JUnit test to the test tree. See Section 6.5, "Adding JUnit Tests" for additional information about adding JUnit tests.

2. Select the **Test** tab.

3. Select the test you want to run.

4. Select **Run Test** from the right-click shortcut menu.

   This dialog box has the following options:

   System - select the system on which you want to run this test. Systems are configured using the Systems Manager.

   Run Name - specify a name to use to identify this test run.

   Version - select the version of the test select Other to enter a version that is not in the list.

   Note: If your administrator has created Test Run custom fields, they will appear in this dialog box.

   ---

5. Select the system on which you want to run the test.

6. Change or update the Run Name.

7. Select the version number against which the test will run and click **Run**.

8. A message stating that the test is running is displayed. A command line window is displayed showing the file execution.

9. Click **Refresh** to show the results in the Run History section of the right pane.

7.9.6 Troubleshooting Third Party Tests

Perform the following steps if the third party test fails to run on the remote machine:

1. Make sure that the Oracle Load Testing Agent Service is running on the remote machine.

2. Check the <installdir>\logs\agentmanager.log file on the remote machine to see if the agent service started correctly.

3. Test the communication port between Agent and Oracle Test Manager.

4. Check the agent manager log file to verify that the `JavaAgent.exe` was run when the third party test was started. It is possible to run the same `JavaAgent.exe` command line specified in the `agentmanager.log` file from a DOS console. Verify that the command line argument for the third party test package URL is correct. If there is no indication that a Java Agent startup request was issued, verify the Agent version and check the Oracle Test Manager server log.

5. If it looks like the Java Agent was started with the correct arguments, look in the remote machine's <installdir>\logs\agentmananger.log file for any exceptions. It may help to set the oracle.oats logging category in <installdir>\agent\log4jJavaAgentDebug.xml file to DEBUG. This will show more useful third party test execution details. The third party test Java Agent posts its results over HTTP to a servlet running on the Oracle Test Manager server.

6. If the agent.log file shows that the third party test ran and that the results were reported successfully to Oracle Test Manager, then the problem is on the Oracle Test Manager server side. Look in the Oracle Test Manager server log for exceptions.

7. Make sure the agent system can access the OTM repository. Setup a shared location for the repository on the server so the agent machine will be able to access that repository.

7.10 Setting Test Results

You can set test results for one or more tests. To set test results:

1. Select the **Tests** tab.

2. Select the tests for which you want to set results.

3. Select **Set test result** from the right-click menu.

    Selected tests - lists the test that you selected. By default, they are selected. Deselect any tests for which you do not want to set the test result.

    Result - select the result that you want to apply to the selected tests.

    Version - select the version that you are testing against.

    Summary - enter any comments.

4. Deselect any tests for which you do not want to set the result.

5. Select the result that you want to apply to the selected tests.

6. Select the version you are testing against.

7. Enter any comments in the Summary field.

8. Click **Save**.

You can set or override the results for one or more test sets. Note that setting or overriding test set results requires "Override result" user privileges. User privileges are set in the Oracle Application Testing Suite Administrator.

To set or override test set results:

1. Select the **Test Execution** tab.

2. Select the test set for which you want to set or override results.

3. Click the **Set result** link in the Test List section of the right pane.

    Test Set - shows the name of the Test Set.

    Run Name - shows the name of the Test Set run.

    Version - shows the version of the Test Set run.

    Make all selected - sets all tests with selected check boxes in the Test Name list to the status selected from this list.

    Test Name - lists the tests in the Test Set. Select the **Test Name** check box to select all tests or select individual test check boxes to select the tests to change status.

    Status - shows the current status of the test. Select a status to change or override the current status.

    Owner - shows the user that owns the test.

    Exec On - shows the last execution date and time for the test.

    Test Type - shows the test type.

    Save - saves the changes to the statuses of the tests in the test set.

    Reset - resets the statuses of the tests in the test set to the last saved statuses.

4. Deselect any tests for which you do not want to set or override the result.

5. Select the result from the **Make all selected** list that you want to apply to the selected tests.

6. Click **Save**.

To reset the test run status for all tests:

1. Select **Options** from the **Tools** menu.

2. Select **Reset Test Runs**.

3. Select **Reset Test Run Status for all test**.

4. Select the **Set Result to** test run status.

5. Enter any summary text into the **Set Summary to** field.

6. Click **Save**.

7.11 Deleting Test Results

You can delete test results based on the date and time the test was run. To delete test results:

1. Select **Delete Results** from the Run History section in the right pane.

This dialog box displays a list of test results by date and time.

2. Select the results you want to delete. You can select more than one test result by clicking on each test result that you want to delete.

3. Click **OK**.

7.12 Viewing Test Details

You can view the result details for each test run of an individual test or the test details for tests run as part of Test Set.

To view test details for an individual test:

1. Click the **Tests** tab.

2. Select the test for which you want to view details.

3. In the Run History section of the right pane, click the date of the test for which you want to view details. The Test Set Run History is only included if the **Include Test Set Runs in Tests Tab** option is selected in the **Right Hand Pane Display** section of the user options (select **Options** from the **Tools** menu).

The details of the test run expand and appear under the Run History section.

To view test details for a Test Set:

1. Click the **Test Execution** tab.

2. Select the Test Set for which you want to view details.

3. If a Test Set run has been created, the **Run History** section appears below the T**est List** of the right pane. Click the date of the test run for which you want to view details.

The Test Set Run Details dialog box show the result details for the tests included in the Test Set.

Status of Test Set Run - shows the name and status information for the Test Set run.

Created by/ on - shows the name of the user who created the Test Set run and date the Test Set run was created.

Passed - shows the number and percentage of tests in the Test Set that passed.

Warning - shows the number and percentage of tests in the Test Set that returned a warning.

Failed - shows the number and percentage of tests in the Test Set that failed.

In Progress - shows the number and percentage of tests in the Test Set that are currently in progress.

Skipped - shows the number and percentage of tests in the Test Set that were skipped.

Not Run - shows the number and percentage of tests in the Test Set that were not run.

Result Parameters - shows the run result parameters for the test.

- **Field** - lists the names of the fields specified for the Test Set run.

- **Value** - lists the values specified for each field for the Test Set run.

- **Test Name** - lists the names of the tests in the Test Set. Click on a highlighted test name to view the result details for that specific test in the **Result Parameters** section below. Test names for tests that have not yet been run will not be highlighted.

- **Duration** - shows the amount of time required to run each test in the Test Set.

- **Result** - shows the run result of the each test in the Test Set.

- **Summary** - shows any summary information entered for each test in the Test Set.

Result Details - shows the selected test name and lists the run result details for the test.

Ran by - shows the name of the user who ran the test.

Exec On - shows the date and time the test was executed.

System - shows the name of the system on which the test was executed. **System** only appears for automated tests.

For OpenScript tests, the Result Report appears in the **Result Details** pane.

For manual, third party, and JUnit tests, the following result details appear:

- **Action** - lists the actions performed for the selected test.

- **Duration** - shows the amount of time required to run each action.

- **Result** - shows the run result of the each action in the test.

- **Summary** - shows any summary information entered for each action in the test.

For third party and JUnit tests, a **View Report** link is also available to open the result report.

7.13 Viewing the Results Report

The Results report is displayed in a separate browser window and gives detailed information about the test run. To view the Results report:

1. Select the test for which you want to view the report.

2. In the **Run History** section of the right pane, click the date of the test for which you want to view the report.

3. Click **View Report** in the Result Summary section of the right pane.

8

Working With Issues

Issues keep track of functionality that did not work as expected. Once entered, issues can be associated with the test or test set that resulted in the issue and other related issues.

8.1 Adding Issues

> **Note:** The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

When you add an issue, it is automatically assigned the next available number in the database and is added at the bottom of the list. This number cannot be changed. You can group issues by clicking **Sort** on the toolbar.

To add an issue:

1. Click the **Issues** tab.

2. Click **Add**.

   This dialog box has the following options.

   Summary - enter the title of the issue.

   Component - select the component associated with the issue. Components are entered by your system administrator using the Administrator.

   Version - select or enter the version of the software that was being tested.

   Assigned To - select the person responsible for the issue. Only users with read permission for this project are listed. These options can be changed by your system administrator.

   Status - select the issue's status. These options can be changed by your system administrator.

   Priority - select the issue's priority. These options can be changed by your system administrator.

   Severity - select the severity of the issue. These options can be changed by your system administrator.

   Platform - select or enter the platform on which the issue occurred. These options can be changed by your system administrator.

   Description - enter a new description.

Solution - enter a new resolution.

Reset - sets all fields back to their original values.

Attachment - lets you add an attachment or link to this issue.

File - lets you add an attachment to the Attachments section.

- **Browse** - displays the Choose File dialog box for selecting the file to attach.

Link - lets you add a link to the Links section.

- **Title** - enter a descriptive title for the link. This will be displayed in the Links section.

- **Link** - enter the URL. For example, `http://www.company.com`. If a title is not entered, the URL is displayed in the links section.

3. Enter the issue details.

4. Click **OK**.

8.2 Deleting Issues

To delete one issue:

1. Select the issue you want to delete.

2. Click **Delete**.

3. Click **Yes** when asked to confirm the deletion.

To delete multiple issues:

1. Select the issues you want to delete using SHIFT-click and CTRL click.

2. Click **Delete**. The Delete Issues dialog box is displayed showing the selected issues.

   Selected nodes - lists the nodes that you selected. Uncheck any nodes that you do not want to delete.

   OK - deletes the selected nodes.

   Reset - checks all of the nodes.

3. Deselect any nodes that you do not want to delete.

4. Click **OK**.

8.3 Editing Issues

> **Note:** The fields and options available to you may be different than those shown in the following examples if your system has been customized by your system administrator.

To edit an issue:

1. Select the issue you want to edit.

   This dialog box has the following options.

   Summary - enter the title of the issue.

Component - select the component associated with the issue. Components are entered by your system administrator using The Administrator.

Version - select or enter the version of the software that was being tested.

Assigned To - select the person responsible for the issue. Only users with read permission for this project are listed. These options can be changed by your system administrator.

Status - select the issue's status. These options can be changed by your system administrator.

Priority - select the issue's priority. These options can be changed by your system administrator.

Severity - select the severity of the issue. These options can be changed by your system administrator.

Platform - select or enter the platform on which the issue occurred. These options can be changed by your system administrator.

Description - enter a new description.

Edit Text - select this option to edit previously entered description text. The text is displayed when the box is checked.

Solution - enter a new resolution.

Edit Text - select this option to edit previously entered solution text. The text is displayed when the box is checked.

Reset - sets all fields back to their original values.

2. Click **Edit**.

3. Make any changes.

4. Click **OK**.

8.4 Editing Multiple Issues

You can edit several issues at the same time if you want to make the same change to them all. To edit multiple issues:

1. Select the issues you want to edit.

2. Select **Edit Issue** from the right-click menu.

   Selected nodes - lists the selected nodes. Deselect nodes that you do not want to edit.

   Fields - the fields listed are determined by the type of node and whether there are any custom fields.

   Check Box - select the check box to change the field's value. The change will be applied to all of the selected nodes.

3. Deselect any nodes that you do not want to change.

4. Select a field that you want to change.

5. Select or enter the new value. The change will be made to all of the selected nodes.

6. Repeat for all fields that you want to change.

7. Click **Save**.

8.5 Associating Issues With Issues

There are two ways to associate issues with other issues. You can search for issues that contain designated values in one or more fields or you can select issues from a tree view.

To associate issues with an issue using search:

1. Select the issue with which you want to associate issues.

2. Select **Add/Edit** from the Associated Issues section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - displays whether you are searching requirements, tests, or issues.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     Severity = High)
     ```

   <left parenthesis> - select the left parenthesis up to three.

   Field - select the field that you want to use to select the items to display.

   Operator

   - **Equals** - causes only items that match the value for the selected field to be displayed.

   - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

   Value - enter or select the value of the field that you want to use to select the items to display.

   <right parenthesis> - select the right parenthesis up to three.

   <operator> - select the operator to use, AND or OR.

   <delete> - deletes the corresponding criteria.

   <expression> - shows the filtering expression you are creating as you select criteria.

   Results - displays the nodes that match the search criteria.

   - **Select** - places the selected nodes in the **Associated Nodes** field.

■ **Select All** - places all nodes in the **Results** field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

■ **Remove** - removes the selected nodes from the **Associated Nodes** field.

■ **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the issues you want associated with this issue and click **Select** or click **Select All** to associate all issues that matched the search criteria.

5. Click **OK**. The issues will be listed in the right pane under the associated issues.

To associate issues with an issue using the tree view:

1. Select the issue with which you want to associate issues.

2. Select **Add/Edit** from the Associated Issues section of the right pane.

   <test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

   ■ **Select** - places the selected test in the **Associated Nodes** field.

   ■ **Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the selected nodes.

   ■ **Remove** - removes the selected nodes from the **Associated Nodes** field.

   ■ **Remove All** - removes all nodes from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the issues you want associated with this issue and click **Select** or click **Select All** to associate all issues that matched the search criteria.

4. To remove nodes from the Associated Nodes field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The issues will be listed in the right pane under the associated issues.

8.6 Associating Tests With Issues

There are two ways to associate tests with issues. You can search for tests that contain designated values in one or more fields or you can select tests from a tree view.

To associate tests with an issue using search:

1. Select the issue with which you want to associate tests.

2. Select **Add/Edit** from the Associated Tests section of the right pane.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

Search for - displays whether you are searching requirements, tests, or issues.

that match - select how to apply the filtering criteria.

- **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high-priority that are assigned to you, use this option.

- **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

- **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria, using parenthesis as required. For example:

  ```
  (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
  Severity = High)
  ```

<left parenthesis> - select the left parenthesis up to three.

Field - select the field that you want to use to select the items to display.

Operator

- **Equals** - causes only items that match the value for the selected field to be displayed.

- **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three.

<operator> - select the operator to use, AND or OR.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

Results - displays the nodes that match the search criteria.

- **Select** - places the selected nodes in the **Associated Nodes** field.

- **Select All** - places all nodes in the Results field in the **Associated Nodes** field.

Associated Nodes - displays the selected nodes.

- **Remove** - removes the selected nodes from the **Associated Nodes** field.

- **Remove All** - removes all nodes from the **Associated Nodes** field.

OK - closes the dialog box and saves changes.

Cancel - closes the dialog box without saving changes.

3. Enter the search criteria or select a saved filter and click **Search**.

4. Select the tests you want associated with the issue and click **Select** or click **Select All** to associate all tests that matched the search criteria.

5. Click **OK**. The tests will be listed in the right pane under associated tests.

To associate tests with an issue using the tree view:

1. Select the issue with which you want to associate tests.

2. Select **Add/Edit** from the Associated Tests section of the right pane.

   <test list> - double click tests to add and delete them from the list of associated tests or select the tests you want to add and click **Select**.

   - **Select** - places the selected test in the **Associated Nodes** field.
   - **Select All** - places all tests in the **Results** field in the **Associated Nodes** field.

   Associated Nodes - displays the selected nodes.

   - **Remove** - removes the selected nodes from the **Associated Nodes** field.
   - **Remove All** - removes all nodes from the **Associated Nodes** field.

   OK - closes the dialog box and saves changes.

   Cancel - closes the dialog box without saving changes.

3. Select the tests you want associated with the issue and click **Select** or click **Select All** to associate all tests that matched the search criteria.

4. To remove nodes from the Associated Nodes field, select the nodes and click **Remove** or click **Remove All** to remove all nodes.

5. Click **OK**. The tests will be listed in the right pane under associated tests.

8.7 Emailing Issues

You can email a issue to one or more people. For email to work, the SMTP server must be configured using the Administrator. To email a issue:

1. Click the **Issues** tab.

2. Select the issue that you want to email and click **Email**.

   Send to - enter the email addresses of the people to whom you want to email this issue. Separate email addresses by a comma.

   To - displays the Select Email recipients dialog box for selecting recipients from a list.

   Subject - enter the text that you want to appear in the subject of the email. The default includes the name and id of the issue.

   Message - enter the text that you want to appear in the message.

3. Enter the recipient email addresses separated by a comma or click **To** to display the Select Email Recipients dialog box.

   <recipient list> - lists users in you database that have email notification enabled.

   Select - adds the selected recipients to the To field.

   To - displays the selected recipients separated by a comma.

4. Select the recipients that you want to receive the issue and click **Select**. Note that only users in your database that have email notification enabled are listed in the dialog box.

5. Click **Done** when you are finished.

6. Change the subject if necessary.

7. Enter a message if necessary.

8. Click **OK**.

9

Working With Reports

Oracle Test Manager contains two tabs for viewing and creating reports. The Reports tab lets you access standard reports and create your own custom reports that you can either keep private or make available to all Oracle Test Manager users. Reports can be saved, emailed, and exported to various formats.

> **Note:** The standard reports that are available is configured by your administrator so that not all reports may be available to all users.

The Dashboard tab displays a high-level view of several reports. The reports that are displayed on this tab can be customized and the view can be saved. These reports can be enlarged into a separate window and then exported to various formats.

9.1 Viewing Reports

To view reports:

1. Click the **Reports** tab.

2. Expand the node containing the report that you want to view.

3. Select the report. It is displayed in the right pane.

4. In the **Report** View, click once on the chart to activate it. You can mouse over the chart or graph to view the value of each slice or bar. Tables do not have a report view.

5. Click the **Data View** tab to view the data in a table.

9.2 Adding Custom Reports

You can add a custom report that can optionally be saved. Custom reports can be designated as either public, that is, available to all users, or private, available only to you.

To add a custom report:

1. Click the Reports tab.

2. Click **Add**. The Add Report dialog box is displayed.

   Define report - this node lets you define the type of report that you want and the fields that you want to display in it.

   Report title - enter a title for the report. The title is displayed in the right pane and in the report tree.

Report category - this field is only displayed when you are editing a report. Select whether the report is to be public or private.

- **Public Reports** - the report is available to all users under the Public Reports node in the location that you select.

- **My Reports** - the report is available only to you. It is listed under My Reports or another node that you create.

- **<location>** - select where to save the report. The categories listed are those that are available under the Public Reports or My Reports nodes. Click **New** to create a new category.

Report on - select the type of data you want to report on: Requirements, Tests, Issues, Test Steps, Test Run, Test Sets, or Test Set Runs. Test Run reports include the runs for test cases executed from the **Tests** tab. Test Set Run reports include the runs for test cases executed from the **Test Execution** tab.

Report type - select the type of report you want to display. Click on the question mark icon to display a sample of the selected report type.

- **Vertical bar chart** - displays a vertical bar chart of the selected fields.

- **Horizontal bar chart** - displays a horizontal bar chart of the selected fields.

- **Pie Chart** - displays a pie chart of the selected fields.

- **Cross tab** - displays a spreadsheet of the selected fields.

- **Text Report** - displays a text report of the selected fields.

- **Trend Report** - this report shows the total number of items in a specific status (or other option list field) by week, day, or month, over the specified date range.

- **Special table report** - this option is automatically selected when you are reporting on test steps.

The following fields are displayed for vertical bar charts, horizontal bar charts, and pie charts:

- **Available fields** - lists the fields that are available for the type of data you are reporting on.

- **<right arrow>** - adds the selected fields to the Selected fields list.

- **<left arrow>** - removes the selected fields from the Selected fields list.

- **Selected fields** - shows the fields that will be included in the report.

The following fields are displayed for cross tab reports:

- **Available fields** - lists the fields that are available for the type of data you are reporting on.

- **<right arrow>** - adds the selected fields to the Selected fields list.

- **<left arrow>** - removes the selected fields from the Selected fields list.

- **Rows** - shows the fields that will be displayed in the rows of the report.

- **Columns** - shows the fields that will be displayed in the columns of the report.

The following fields are displayed for text reports:

- **Available fields** - lists the fields that are available for the type of data you are reporting on.

- **<right arrow>** - adds the selected fields to the Selected fields list.

- **<left arrow>** - removes the selected fields from the Selected fields list.

- **Selected fields** - shows the fields that will be included in the report.

- **Sort By** - shows the fields that will be used to sort the report.

The following fields are displayed for trend reports:

- **Start date** - select the date on which you want to start reporting by clicking on the calendar icon.

- **End date** - select the date on which you want to end reporting by clicking on the calendar icon.

- **Trend by** - select how you want to trend the data, day, week, or month.

- **Trend of** - select the field that you want to show the trend of. The fields vary depending on the data you are reporting on.

- **Select Trend options** - select the option on which you want to trend. The options are based on what you selected in the Trend of field.

The following fields are displayed for test step reports:

- **Available Test fields**- lists the fields that are available for tests.

- **<right arrows>** - adds the selected fields to the Selected fields or Columns list.

- **<left arrows>** - removes the selected fields from the Selected fields or Columns list.

- **Selected Test fields** - shows the fields that will be included in the report.

- **Available TestStep fields** - lists the fields that are available for test steps.

- **Columns** - shows the fields that will be included in the report.

The following options and fields are displayed for test run reports:

- **use last run result** - when selected, each test report contains only the last result.

- **use all run results** - when selected, each test run report contains all test runs results based upon the specified filters. The filters saved for the Test Run reports are only available within the Reports tab. The saved filters are not available from within the Test tab.

- **Available Test fields**- lists the fields that are available for tests.

- **<right arrow>** - adds the selected fields to the Selected fields list.

- **<left arrow>** - removes the selected fields from the Selected fields list.

- **Selected Test fields** - shows the fields that will be included in the report.

The following fields are displayed for test sets reports:

- **Available fields**- lists the fields that are available for tests.

- **<right arrow>** - adds the selected fields to the Selected fields list.

- **<left arrow>** - removes the selected fields from the Selected fields list.

- **Selected fields** - shows the fields that will be included in the report.

The following fields are displayed for test set runs reports:

- **Group records by**- specifies how to group items in the report: Group by Test Set or Group by Test Case.

- **Available fields**- lists the fields that are available for tests.

- **<right arrow>** - adds the selected fields to the Selected fields list.

- **<left arrow>** - removes the selected fields from the Selected fields list.

- **Selected fields** - shows the fields that will be included in the report.

- **Sort By** - shows the fields that will be used to sort the report.

3. If you want to further filter the data you are including in the report, click **Define filters**.

   Saved filters - lists the saved filter configurations. Select a saved filter to edit or delete it.

   Save - displays the Save Criteria dialog box for saving the settings. Filters do not have to be saved.

   Delete - deletes the selected saved filter.

   Search for - select whether you are searching requirements, tests, or issues. If you are filtering a report, this fields defaults to the type of data you are reporting on and cannot be changed.

   that match - select how to apply the filtering criteria.

   - **all** - match all of the configured criteria. This setting places an AND between the criteria. For example, if you wanted to view all issues with a high priority that are assigned to you, use this option.

   - **any** - match any of the configured criteria. This setting places and OR between the criteria. For example, if you wanted to view all issues with either a high priority or a high severity, use this option.

   - **a combination** - this setting lets you combine AND and OR. For example, if you wanted to view all issues assigned to Mary or Caren with a high priority, use this option. This option lets you select how to group the criteria using parenthesis as required. For example:

     ```
     (((Assigned to = Mary OR Assigned to = Caren) AND Priority = High) OR
     Severity = High)
     ```

   <left parenthesis> - select the left parenthesis up to three. This field only appears if **a combination** is selected as the match type.

   Field - select the field that you want to use to select the items to display. For Report filters, the field names include either an asterisk (*) or a hash (#) mark. Fields marked with an asterisk (*) indicate Test Case fields. Fields marked with a hash (#) indicate Test Set fields.

   Operator

   - **Equals** - causes only items that match the value for the selected field to be displayed.

   - **Not Equal to** - causes only items that do not match the value for the selected field to be displayed.

   - **<=** - this option is only available when Creation date is the selected field. It causes items less than or equal to the selected date value to be displayed.

- >= - this option is only available when Creation date is the selected field. It causes items greater than or equal to the selected date value to be displayed.

Value - enter or select the value of the field that you want to use to select the items to display.

<right parenthesis> - select the right parenthesis up to three. This field only appears if **a combination** is selected as the match type.

<operator> - select the operator to use, AND or OR. This field only appears if **a combination** is selected as the match type.

<delete> - deletes the corresponding criteria.

<expression> - shows the filtering expression you are creating as you select criteria.

If you select Creation Date, a calendar icon is displayed to the right of the **Value** field for selecting a date. Click on the calendar icon to display the calendar. The calendar has the following options:

dash (-) - toggles the first column displayed between Sun and Mon.

<< and >> - displays the same month in the previous or next year.

< and > - displays the previous or next month.

4. Select how you want to match criteria. Select **all** to match all criteria. Select **any** to match one criteria. Select **a combination** to create a filter using a combination of And and Or.

5. Select or enter the first value by which you want to filter.

6. Select **Equals** if you want to display items that match the value. Select **Not Equal to** if you want to display items that do not match the value.

7. Select the value to use.

> **Note:** You can use SQL characters for searching. For example, if you wanted to find all issues that contained Joe Smith and Mary Jones in the description field, you could enter %Joe Smith%Mary Jones% in the value field.

8. Repeat these steps to filter to additional levels, if required.

9. Optionally, click **Save** to save the filter for reuse. The Save criteria dialog box is displayed.

10. Enter a name for the filter and click **OK**.

11. Click **OK**. The report is displayed in the right pane. The report is listed in the Report tree as not saved.

12. Click **Save** if you want to keep the report for future use or make it available to other users. The Save Report dialog box is displayed.

Report name- enter a name for the report. This is the name that will appear in the report tree.

Report category - select whether the report is to be public or private.

- **Public Reports** - the report is available to all users under the Public Reports node in the location that you select.

- **My Reports** - the report is available only to you. It is listed under My Reports or another node that you create.

<location> - select where to save the report. The categories listed are those that are available under the Public Reports or My Reports nodes. Click **New** to create a new category.

Report Details - lists the type of report and the data that is being reported on.

13. Enter a name for the report. This is the name that will appear in the report tree.

14. Select the category in which to save the report. Select **New** to create a new category.

15. Click **OK**.

9.2.1 Working with Test Set Execution Reports

The Other Reports folder under Public Reports folder includes Test Set Execution Summary and Test Set Execution Trend reports that can be used to generate reports for Test Sets executed from the Test Execution tab.

Initially, the Test Set Execution Summary report will contain no data if no Test Sets have been created or executed from the Test Execution tab. However, the Test Set Execution Trend report will contain data for all test runs for all test cases, which in most cases will yield unsatisfactory results. Define a custom report filter to generate a Test Set Execution Trend report specific to your requirements.

To define a custom report filter for a Test Set Execution Trend report:

1. Go to the **Reports** tab.

2. Expand the Public Reports folder, then expand the Other Reports folder.

3. Select the Test Set Execution Trend report.

4. Click the **Filter** button on the toolbar.

5. If necessary, select **Define filters** in the left pane.

6. Select the **Fields** list and select the field to use to filter the report. For Report filters, the field names include either an asterisk (*) or a hash (#) mark. Fields marked with an asterisk (*) indicate Test Case fields. Fields marked with a hash (#) indicate Test Set fields.

7. Select the **Operator** and **Value** to use for the filter. For example, to define a filter to display trend results for a specific Test Set by ID, set the `TestSetId#` field equal to the Test Set ID. To define a filter to display trend results for a specific Test Set by name, set the `Name#` field equal to the Test Set name. To define a filer to display trend results for the Last Run Status, set the `Last Run Status#` field equal/not equal to the desired status.

8. Optionally, add additional **Field**, **Operator**, and **Value** sets to refine the filter definition. For example, to generate a report for the last run of a specific Test Set ID, specify the operators and values for the `TestSetId#` and `Last Run Status#` fields, as follows:

Figure 9–1   Example Test Set Trend Report Filter

9. Click **OK** when finished.

9.3 Editing Custom Reports

Only custom reports that have been saved can be edited. To edit a report:

1. Click the **Reports** tab.

2. Select the custom report that you want to edit and click **Edit**.

3. Make any changes to the report definition, report location, or the report filters.

4. Click **Apply**.

5. Click **OK**.

9.4 Cloning Reports

Cloning a report is useful when there is an existing report that is close to what you are looking for. You can clone it, that is, make a copy of it, and then edit it to your specifications. To clone a report:

1. Click the Reports tab.

2. Select the report that you want to clone and click Clone. The report is copied and saved at the end of its original category with the words Copy of in front of the report name.

3. Click Edit to display the Edit Report dialog box.

4. Make any changes to the report definition, report location, or the report filters.

5. Click Apply.

6. Click OK.

9.5 Deleting Reports

Only custom reports that have been saved can be deleted. Custom reports that have not been saved will not be available the next time you log in. To delete a report.

1. Click the **Reports** tab.

2. Click the custom report that you want to delete and click **Delete**.

3. Click **Yes** when asked to confirm.

9.6 Emailing Reports

You can email a report to one or more people. For email to work, the SMTP server must be configured using the Oracle Test Manager Administrator. Refer to Section 11.4, "Configuring Email Preferences" for more information.

To email a report:

1. Click the **Reports** tab.

2. Select the report that you want to email and click **Email**.

   Selected Report - displays the name of the report you are emailing.

   Send to - enter the email addresses of the people to whom you want to email this report. Separate email addresses by a comma.

   To - displays the Select Email recipients dialog box for selecting recipients from a list.

   Subject - enter the text that you want to appear in the subject of the email. The default is the name of the report.

   Attach as - select the format in which you want to attach the report, pdf or jpeg.

   Message - enter the text that you want to appear in the message.

3. Enter the recipient email addresses separated by a comma or click **To** to display the Select Email Recipients dialog box.

   <recipient list> - lists users in you database that have email notification enabled.

   Select - adds the selected recipients to the To field.

   To - displays the selected recipients separated by a comma.

4. Select the recipients that you want to receive the report and click **Select**. Note that only users in your database that have email notification enabled are listed in the dialog box.

5. Click **Done** when you are finished.

6. Change the subject if necessary.

7. Select the file type in which you want the report to be sent.

8. Enter a message if necessary.

9. Click **OK**.

9.7 Viewing Dashboard Reports

There are three default dashboard reports, one for requirements, one for issues, and one for tests. You can rearrange the order of the reports, add or remove reports to the display, and save your changes. You can also create new dashboard reports as described later in this chapter. To view a dashboard report:

1. Click the **Dashboard** tab.

2. Select the dashboard report that you want to view.

3. Select the number of columns to display.

4. Move the reports in the display using the arrows in the toolbar.

5. Click Toggle to display the report tree for adding a report to the display. Double click the report that you want to add to the display.

6. Click the **Toggle** button to close the report tree.

7. Click **Save** to display the Save Dashboard to save your changes.

   Dashboard name- enter a name for the dashboard report.

   Dashboard type - select the type of dashboard report. Public dashboards are listed first in the dashboard dropdown, followed by the private dashboards.

- **Public dashboards** - select this option to make this dashboard report available to all users.

- **My dashboards** - select this option to make this dashboard available only to you.

8. Enter a new name for the Dashboard report, if necessary.

9. Select the type of dashboard report.

10. Click **OK**.

9.8 Adding Dashboard Reports

To add a dashboard report:

1. Click **Add** on the Dashboard tab.

2. The report tree is displayed with a blank report on the right. Expand the report tree and double-click on the reports that you want to add. They will be displayed in the right pane as shown in the following example.

3. Click **Toggle** to close the report tree.

4. Click **Save** to save the new dashboard report.

5. Enter a name for the dashboard report.

6. Enter a title for the dashboard report.

7. Select whether you want to make this report available to all users or just to yourself.

8. Click **OK**.

9.9 Deleting Dashboard Reports

To delete a dashboard report:

1. Select the dashboard report that you want to delete from the dashboard dropdown list.

2. Click **Delete**.

3. Click **Yes** when asked to confirm.

9.10 Exporting Reports

Reports can be exported from the Reports tab and the Dashboard tab. You can export to jpg from the Report View tab. You can export to xls from the Data View tab. To access the Report View and Data View tabs from the Dashboard report, maximize the report that you want to export by double-clicking the up/right arrow in the toolbar for the specific report. The individual Dashboard report opens in a separate browser window.

9.10.1 Exporting to JPG

To export to jpg:

1. Click the Report View tab of the report that you want to export.

2. Click **Export report to jpg** then specify the location and file name of the file to save.

9.10.2 Exporting to XLS

To export to xls:

1. Click the Data View tab of the report that you want to export.

2. Click **Export to xls**. A dialog box opens with the options to open the file in Excel or save the file to disk. Click **Open** to open the file in Excel (you must have Microsoft Excel installed) or click **Save** to specify the location and file name of the file to save.

9.10.3 Exporting to HTML

To export to HTML:

1. Click the Data View tab of the report that you want to export.

2. Click **Export to HTML** then specify the location and file name of the file to save.

10

Configuring Databases

This chapter explains how to add and remove databases from Oracle Test Manager, and how to update name, location, and login information for databases that you are using in Oracle Test Manager.

10.1 Adding Databases

You can add an existing Oracle Database 12*c* Enterprise Edition, 11*g* Enterprise Edition, or 11*g* Express Edition database for Oracle Test Manager and Oracle Load Testing or you can create a new schema. In addition, you can create tables in an empty database. When you add a database, the Database Configuration Utility creates a user account for the default user and the administrator. Use Oracle Test Manager Administrator to add more users and to customize projects.

10.1.1 Adding Oracle Databases

To add an Oracle database or configuration schema:

1. Use the Oracle Application Testing Suite Database Configuration utility to configure database connections to Oracle Load Testing databases. On Windows machines, you can access the Database Configuration utility from the **Tools** sub menu of the Oracle Application Testing Suite **Start** menu. On Linux machines, you can access the Database Configuration utility from *<oats_install>*/bin/DbConfig.sh.

2. Select the type of database to add: **Oracle Test Manager**, **Oracle Load Testing,** or **Configuration schema**.

3. Click **New**.

4. Select **Use existing schema** or **Create new schema & tables**.

   This dialog box has the following options:

   Use existing schema - when selected, a database is added using an existing Oracle database schema.

   Create new schema & tables - when selected, a database is added using an new Oracle database schema and tables.

   System user credentials - specify the login authentication credentials if you select to create a new schema and tables, as follows:

   ■   **User name** - enter the login user name for the database system.

   ■   **Password** - enter the login password for the database system.

   Connection details - enter the Oracle database connection information.

- **Name** - enter the name of the database This name appears in the database selection lists for Oracle Test Manager.

- **Description** - enter any description text to identify the database.

- **Host** - enter the host name of the machine on which the database server is running.

- **Port** - enter the port number that you want to communicate with. If you are running multiple instances of Oracle Database on the same host, specify the port number you want to communicate with.

- **Service** - enter the Service name for the Oracle database.

- **User name** - enter the login user name for the database.

- **Password** - enter the login password for the database.

- **Tablespace** - the tabespace name. When creating a new configuration schema and tables, you can choose to create a new user on the database or use an existing user. If creating a new user, provide a tablespace name where the user will be created. The "USERS" tablespace will be used as default.

Options - select options, as follows:

- **Project Template** - specifies which project template to use for test management including specific fields, reports, and, if selected, sample data for each module (Requirements, Tests, Issues, and Reports):

  - **Default** - when selected, the Database Configuration utility creates the default test management database schema for the Oracle Test Manger application database.

- **Insert sample data** - when selected, the sample data is installed into the new database. For Oracle Test Manager, the sample data is the Sample Project used for the tutorial. For Oracle Load Testing, the sample data is the two load sessions that can be used to generate sample reports.

5. Enter the database connection details. If you selected **Create new schema & tables**, enter the **System user credentials** and the **Tablespace** name.

6. Select the Project Template to use.

7. Select **Insert sample data**, if desired.

8. Click **Save**.

9. Click **Close**. When you add a new connection for an Oracle Load Testing database or a new Configuration schema, the new database is not automatically set as the default connection. Select the database in the **Database Connections** list and click the **Set current** toolbar button if you want the new connection to be the current database connection.

10. Either restart the computer or restart the Oracle Application Testing Suite Application service by going to the Control Panel Administrative Tools and open **Services** and restart the Oracle Application Testing Suite Application Service.

10.2 Removing Databases

You can remove databases from Oracle Test Manager. Doing so does not delete the database files. It removes the database from the database selection lists so that the database is no longer available in Oracle Test Manager. The database cannot be deleted if it is open in Oracle Test Manager.

To remove a database from Oracle Test Manager:

1. Select **Programs** from the **Start** menu then select **Oracle Test Manager Database Configuration** from the **Oracle Application Testing Suite** - **Tools** menu.

2. Select the database that you want to remove.

3. Click **Remove**.

4. Click **Yes** to confirm the deletion.

10.3 Updating Databases

You can change the name, location, and login information for databases that you are using in Oracle Test Manager.

1. Select **Programs** from the **Start** menu then select **Oracle Test Manager Database Configuration** from the **Oracle Application Testing Suite** - **Tools** menu.

2. Select the database that you want to update.

3. Click **Update**.

4. Make any changes.

5. Click **OK**.

10.4 Exporting and Importing Databases

Oracle Application Testing Suite Release 12.5 and higher supports Oracle Database EE 12*c*, 11*g* or XE 11*g* as the RDBMS for its load testing and test management components. In some cases, it may be necessary to transfer data between databases. The basic procedure to is to export a database dump from one database and then import the dump file into the new database. The following sections provide basic details for exporting and importing an Oracle XE database. See the *Oracle Database Utilities* documentation for additional information about using the original Export (`exp`) and Import (`imp`) utilities and the Data Pump Export (`expdp`) and Data Pump Import (`impdp`) utilities.

10.4.1 Exporting Databases Using Export Utility

The Database Export utility provides a way to transfer data objects between Oracle databases, even if the database reside on different platforms. Running the Export utility on an Oracle database extracts objects (such as tables) with all related objects (such as indexes, comments, and grants), if any. The extracted data is written to an Export file.

To export a database using the export utility:

1. Open a command prompt.

2. Change directory to Oracle home. For example,
    `C:\OracleATS\oxe\app\oracle\product\10.2.0\server\BIN`

3. Enter the following command:

    ```
    exp userid=username/password owner=schema name file=Exportfile.dmp
    log=Export.log
    ```

    where:

    `userid=` specifies the username/password of the user performing the export.

owner= specifies the schema name to export ("oats", "olt", "otm").

file= specifies the file name to which the schema will be exported.

log= specifies the log file name to save any warnings or errors that may have occurred during export.

For additional parameter information, type exp help=y at the command prompt.

Example:

```
exp userid=system/oracle owner=OATS file=OATS.dmp log=Error.log
```

10.4.2 Importing Databases Using Import Utility

The Import utility reads the object definitions and table data from an Export dump file and inserts the data objects into an Oracle database.

To import a database from an exported dump file:

1. Open Sql Plus and create a user (for example, Test) and grant roles (connect, resource, create any view) to the newly created user.

   - create user Test identified by password;

   - grant connect, resource, create any view to user Test;

2. Open a command prompt.

3. Change directory to Oracle home. For example, C:\OracleATS\oxe\app\oracle\product\10.2.0\server\BIN

4. Enter the following command.

   ```
   imp userid=user/pwd fromuser=OATS touser=Test file=Exportfile.dmp log=test.log
   ```

   where:

   userid= specifies the username/password of the user performing the import.

   fromuser= specifies a list of owner usernames. This parameter enables you to import a subset of schemas from an export file containing multiple schemas.

   touser= specifies a list of usernames whose schemas will be targets for import.

   file= specifies the name of the exported dump file. For example, Exportfile.dmp.

   log= specifies the log file name to save any warnings or errors that may have occurred during import.

   For additional parameter information, type imp help=y at the command prompt.

   Example:

   ```
   imp userid=system/oracle fromuser=olt touser=Test file=Exportfile.dmp
   log=test.log
   ```

5. Add the new database to the Oracle Application Testing Suite using the Oracle Application Testing Suite Database Configuration utility. See Section 10.1, "Adding Databases" for additional information.

10.4.3 Importing Databases Using Data Pump Import Utility

In cases where the database was exported using the Data Pump Export (expdp) utility, you use the Data Pump Import (impdp) utility to import the database.

To import a database from a Data Pump Export utility:

1. Create a folder. (for example c:\test)

2. Open Sql Plus and enter the following command:

    ```
    SQL> create directory test as '/backup/db_name/exports/dpump' ;
    ```

3. Grant read and write permissions to the users who will be performing the data pump import. Note: before granting following permission please log in as sys as sysdba (different user than logged in user and should be logged in as dba)

    ```
    SQL> grant read, write on directory test to system, user1, user2, user3;
    ```

4. Open a command prompt.

5. Change directory to Oracle home. For example,
    `C:\OracleATS\oxe\app\oracle\product\10.2.0\server\BIN`

6. Enter the following command:

    ```
    impdp system/<Password> DIRECTORY=<dir name> DUMPFILE=<dmpfile.dmp>
    LOGFILE=<logfilename.log> remap_schema=<source_schema>:<target_schema>
    ```

    For additional parameter information, type `impdp help=y` at the command prompt.

    Example:

    ```
    impdp system/oracle DIRECTORY=test DUMPFILE=expdp_Exportfile.dmp
    LOGFILE=impfull.log remap_schema=oats:oats
    ```

11

Administering the Database

The Administrator allows the system administrator to manage users, roles, projects, and fields.

11.1 Starting the Administrator

The Administrator allows you to create user accounts, assign them user names and passwords, and assign the type of access that they have in Oracle Test Manager. The Administrator allows you to manage users, roles, projects, and fields.

Two default administrator accounts are created at installation. The usernames for the default accounts are **administrator** and **default**. The default password for both the **administrator** and **default** accounts is the master password specified during the Oracle Application Testing Suite installation process. You can change the password after logging in to the Administrator. It is recommended that you change the default password as soon as you log in.

To start the Administrator:

1. For Windows installations, select **Administrator** from the Oracle Application Testing Suite **Start** menu or enter `http://<machine>:8088/admin` or `http://localhost:8088/admin` in your browser where `<machine>` is the name of the machine where the Oracle Application Testing Suite is installed.

   For Linux installations, enter `http://<machine>:8088/admin` or `http://localhost:8088/admin` in your browser where `<machine>` is the name of the machine where the Oracle Application Testing Suite is installed.

2. Enter your password.

3. Select the Oracle Test Manager database that you want to access.

4. If this is the first time you are logging in, change the administrator password by clicking the User tab, selecting the Administrator user, and clicking **Edit**.

5. Enter the new password, verify it, and click **OK**.

11.2 Administrator Basics

The Administrator consists of tabs for configuring users, roles, projects, and customizing both custom and default fields.

11.2.1 Users Tab

The Users tab is where you add, delete, and configure users and their roles in projects. Roles determine the permissions the user has in each project. The users are displayed

at the top of the screen and the roles for the selected user are displayed on the bottom of the screen.

This tab has the following options:

Add - displays the Add User dialog box for adding a new user.

Edit - displays the Edit User dialog box for the selected user. You can change the user's name, username, or password.

Assign - Displays the Edit Role dialog box for assigning roles to the selected user for the selected projects.

Delete - deletes the selected user.

Sync LDAP Users - synchronizes users with the LDAP server. Use this option to keep Oracle Test Manager authentication in sync with the LDAP server updates. This option is only used when using LDAP authentication.

Restore - displays the Restore Previously Deleted User dialog box for restoring a previously deleted user to the users list.

Username - displays the name the user will use to log on. Click the column header to sort users in ascending order by this field.

LDAP Username - displays the Lightweight Directory Access Protocol (LDAP) server authentication name the user will use to log into Oracle Test Manager if LDAP Server authentication is configured. Click the column header to sort users in ascending order by this field.

First Name - displays the user's first name. Click the column header to sort users in ascending order by this field.

Last Name - displays the user's last name. Click the column header to sort users in ascending order by this field.

E-mail - displays the user's email address. When **Enable E-mail notification** is selected for the user, the user will receive email notifications when items are created, or when the owner or assigned to field is changed for issues. Click the column header to sort users in ascending order by this field.

E-mail Notify - indicates whether the user will receive email notifications. Click the column header to sort users in ascending order by this field.

Administrator Access - indicates whether the user can access the Oracle Test Manager Administrator.

Assignments for <user> - displays the roles assigned to the selected user for each project in the database.

- **Project** - displays a list of the projects in the database.

- **Role** - displays the role of the selected user for the project.

11.2.2 Roles Tab

The Roles tab is where you configure roles. Roles determine the read, write, delete, and execute permissions for users in projects. Once roles are created, you assign them to users for each project that you want them to have access to. A user's role can differ from project to project. Click **Assign** on either the Projects tab or Users tab to assign roles.

Add - displays the Add Role dialog box for adding a role.

Edit - displays the Edit Role dialog box for editing the selected role.

Delete - deletes the selected role. If a role is in use, you will be asked to assign another role to users assigned to this role.

Permissions for <role> - displays the read, write, delete, and execute permissions for this role for projects, test plans, requirements, tests, and issues.

- **Project** - displays the read, write, and delete permissions for projects for users assigned to this role.

- **Test Plan** - displays the read, write, and delete permissions for test plans for users assigned to this role.

- **Requirement**- displays the read, write, and delete permissions for requirements for users assigned to this role.

- **Test** - displays the read, write, delete, and execute permissions for tests for users assigned to this role.

- **Issue** - displays the read, write, and delete permissions for issues for users assigned to this role.

- **Public Reports** - displays the read, write, and delete permissions for public reports assigned to this role.

- **My Reports** - displays the read, write, and delete permissions for reports assigned to this role.

11.2.3 Projects Tab

The Projects tab is where you maintain projects.

Add- displays the Add Project dialog box for adding a new project.

Clone - displays the Clone Project dialog box for duplicating the selected project. When you clone a project, user roles are the same as the original project.

Edit - displays the Edit Project dialog box for changing the name of the selected project.

Assign - displays the Edit Role dialog box for assigning roles to users for the selected project(s).

Map LDAP - displays the LDAP Group Mapping Details dialog box for mapping LDAP Groups to Oracle Test Manager Projects and Roles.

Delete - deletes the selected project.

[project list] - displays a list of projects in the database.

- **Project** - displays a list of projects in the database.

- **Track History** - displays if history tracking is enabled or not for the project. See Section 11.9.1, "Adding Projects" for additional information.

Assignments for [selected project] - shows the users and role assignments for the project selected in the project list.

- **User** - displays the users in the database.

- **First Name** - displays the user's first name.

- **Last Name** - displays the user's last name.

- **Role** - displays the users' roles in the project.

All Mapped LDAP Groups - shows the selected LDAP Groups, projects, and roles for the project selected in the project list. See Section 11.5.5, "Mapping LDAP Groups to Oracle Test Manager Projects and Roles" for additional information.

- **LDAP Group Name** - lists the LDAP Group names in the selected project.

- **Project Name** - displays the Oracle Test Manager Project mapped to the LDAP Group.

- **Role Name** - displays the Oracle Test Manager Role mapped to the LDAP Group.

11.2.4 Fields Tab

The Fields tab is where you customize both default and custom fields. These fields are used in Oracle Test Manager for maintaining details about requirements, tests, test sets, issues, and test runs.

This tab has the following options:

<Field List> - lists the categories and types of fields that you can customize. The categories are:

- **Test Plans** - fields that pertain to test plans that appear in the Add/Edit Test Plans dialog boxes and are displayed in the right pane.

- **Requirements** - fields that pertain to requirements that appear in the Add/Edit Requirements dialog boxes and are displayed in the right pane.

- **Tests** - fields that pertain to tests that appear in the Add/Edit Tests dialog boxes and are displayed in the right pane.

- **Test Sets** - fields that pertain to tests that appear in the Add/Edit Test Execution dialog boxes and are displayed in the right pane.

- **Issues** - fields that pertain to issues that appear in the Add/Edit Issues dialog boxes and are displayed in the right pane.

- **Test Runs** - fields that pertain to test runs that appear in the Run Test dialog box and are displayed in the Result Parameters section of the right pane when you click the run date of a test in the Run History section.

Each category has two types of fields:

- **Default Fields** - these are the fields that are shipped with the product. You can add and delete options and change the labels.

- **Custom Fields** - these are user-created fields. These fields are used for entering information in Oracle Test Manager. They are added to the input and edit dialog boxes for requirements, tests, and issues. They are displayed in the right pane with the default fields, and they can be used for grouping and reporting.

Name - displays the field name.

Label - displays the label displayed in Oracle Test Manager.

Type - displays the type of field. The options are:

- **Option List** - lets you select an option from a list.

- **Option List/Text** - lets you select an option from a list or enter text.

- **User List** - creates a list of the users in the database and lets you select one.

- **Text** - lets you enter one line of text.

- **Multiline Text** - lets you enter multiple lines of text.

- **Multiline/Append** - creates a multiline text field and when editing, lets you choose to append new text to existing text. If you choose to append, the date and user name are automatically added.

- **Heading** - lets you create a heading for grouping custom fields. The heading is for display purposes only in the right-hand pane of Oracle Test Manager.

Trigger Email Notification - indicates whether an email will be sent to the configured recipients when this field changes. Click the pencil icon to display the Setup E-mail Configuration dialog box for configuring email recipients. The logged in user should not be the same as the username that is specified for the trigger. The trigger checks the email address of the user who changes the field and does not send notification to any users with the same email address.

Include In Email - indicates whether the field should be included in email.

Required - indicates whether the field is required, that is, data must be entered when the requirement, test, or issue is created.

Enabled - indicates whether the field is being used in Oracle Test Manager.

Project - indicates the project to which this field applies.

Add - displays the Add Field dialog box for adding a custom field.

Edit - displays the Edit Field dialog box for the selected custom field.

Delete - deletes the selected custom field.

Move Up - moves the selected field up one place.

Move Down - moves the selected field down one place.

Option List - lets you maintain the options for the selected field if the field is an option list type of field.

- **Add** - displays the Add Option dialog box for adding an option to the selected field.

- **Edit** - displays the Edit Option dialog box for renaming the selected option.

- **Delete** - deletes the selected option.

- **Move Up** - moves the selected option up one place.

- **Move Down** - moves the selected option down one place.

- **Project** - lets you select the project to which the options apply. This field is only available when you select the **Project Specific Options** check box in the Add Custom field dialog box for this field. When this check box is selected you can add options specific to each project; otherwise, all projects will have the same options.

Email Recipients - lists the roles and/or email addresses of the people that will receive an email when the selected field changes.

- **Project** - select the project for which you want to display the email recipients.

- **MailIds** - lists the email addresses to which email will be sent when the field changes.

- **Roles** - lists the roles of the email recipients to which email will be sent when the field changes.

When you select the category in the left pane, the associated fields are displayed in the top right pane. When you select the field in the top right pane, its associated options are displayed in the Option List.

11.2.5 Usage Audit Tab

The Usage Audit tab is where you review and audit the load testing sessions stored in the Oracle Load Testing database.

This tab has the following options:

OLT Databases - lists the installed Oracle Load Testing Databases available for auditing.

User Name - shows the name of the user who ran the load test. "Anonymous" indicates the login feature was disabled for the instance of Oracle Load Testing that ran the test and there is no username associated with the test. "Command Line" indicates the load test ran from the command line interface.

Session Name - shows the name of the load testing session.

Start Time - shows the start date and time for the load testing session.

End Time - shows the end date and time of the load testing session.

Duration (HH:MM:SS) - shows the duration of the load testing session in hours, minutes, and seconds.

Machine Name - shows the name of the machine on which the load testing session was run.

Max VU Count - shows the maximum count of Virtual Users that were run for the load testing session.

11.3 Overview of the Menu Options

The menus provide options for saving changes to the database and for accessing the database maintenance tools.

11.3.1 Tools Menu

The Tools menu lets you purge the database, unlock locked records, set up the LDAP and e-mail configurations, and manage default reports.

Unlock Locked Records - unlocks locked records in the database. This is an emergency feature to be used to clear out locks in the database when the product fails and leaves entries locked for editing.

Purge Deleted Records - physically removes all deleted data from the database. Deleted items are marked as such and are not shown in the user interface; however, they are kept in the database until the database is purged.

Setup E-mail Config - displays the Setup E-mail Configuration dialog box for configuring the mail server to use for e-mail notifications.

Setup LDAP Config - displays the Setup LDAP Server Configuration dialog box for configuring the LDAP server to use for user log-in authentication.

Manage Default Reports - displays the Manage Default Reports dialog box for selected which default reports will be visible to individual users.

11.3.2 Help Menu

Contents - opens the help system contents.

About Admin - provides version number and copyright information.

11.3.3 Logout

Exits the application.

11.4 Configuring Email Preferences

You can set up individual users so that they receive email notification when a new requirement, test, or issue is created, or when the owner or assigned to field is changed for an issue. In addition, you can configure emails to be sent to the owner and creator when certain conditions occur. For this to work, the email server must be configured.

To configure the email server and email preferences:

1. Select **Setup E-mail Config** from the **Tools** menu.

2. Click **Configure SMTP Settings**.

   This dialog box has the following options:

   SMTP Server - enter the server name, and optionally a colon (:) followed by a port number. The default port number is 25.

   Return Address - enter the return address for email sent by Oracle Test Manager.

   Send To - enter the email address to which you want to send a test e mail when you click the **Test** button.

   Test - displays the Test E-mail Configuration dialog box for testing your configuration.

3. Enter the SMTP Server name.

4. Enter the return address for emails sent by Oracle Test Manager.

5. Enter the email address to which you want to send the test email.

6. Click **Test** to test the configuration.

7. Click **Traceability** to select options for when to send email.

   Notify creator of changes - sends an email to the node creator when the owner changes. Email is not sent if the node creator becomes the current owner or if the node creator initiated the activity.

   Notify Owner of associated test(s) when a requirement changes - when a requirement changes, sends an email to the owner of tests associated with this requirement.

   Notify Owner of associated issue(s) when a test runs - when a test runs, sends an email to the owner of issues associated with this test.

8. Select when you want to send email.

9. Click **Save**.

11.5 Implementing LDAP User Authentication

You can implement Lightweight Directory Access Protocol (LDAP) server authentication to allow Oracle Test Manager users authentication against the LDAP server providing users a single sign-on solution. This section provides instructions for implementing LDAP user authentication for Oracle Test Manager.

11.5.1 Prerequisites

Implementing LDAP user authentication for Oracle Test Manager has the following prerequisites:

- An LDAP server is step up with users and groups. Oracle Test Manager supports OpenLDAP and Active Directory LDAP servers.

- You have the LDAP server configuration information necessary to configure the server in the Oracle Application Testing Suite Administrator. The following information is required to set up the LDAP sever configuration:

  LDAP Host - specifies the host name of the LDAP Server.

  Port - specifies the port number to use for the LDAP server.

  Option Values - specifies the base LDAP server group option, as follows:

  – **Base DN** - specifies the base distinguish name (for example, dc=maxcrc,dc=com).

  Security - specifies the LDAP server authentication information, as follows:

  – **Level** - specifies the LDAP security level: ssl=SSL+User+Password and simple=User+Password.

  – **User DN** - specifies the user distinguish name.

  – **Password** - specifies the user password for authentication to the LDAP server.

  – **Activate LDAP User Authentication** - when selected, LDAP user authentication for Oracle Test Manager login is enabled and the local authentication is disabled for all users except the Administrator and Default user. Oracle Test Manager users must use a valid LDAP user name and password to log into Oracle Test Manager.

  > **Note:**   For OATS Administrators who have an existing base of Oracle Test Manager users with Oracle Test Manager login credentials currently being used, DO NOT enable LDAP User Authentication until after the time frame provided for users to specify their LDAP username in the Oracle Test Manager User Options.

  Group Attributes - specifies the group attibutes and search filter, as follows:

  – **Attributes** - specifies the name of the attribute(s) that Oracle Test Manager retrieves the group name from. If your server configuration uses more than one, include additional attributes separated by a semicolon (;). The default value is ou.

  – **Search Filter** - defines the filter to use when searching groups. The default value is (objectClass=organizationalUnit).

  User Attributes - specifies the user attibutes, as follows:

  – **User Name** - defines the attributes of an LDAP entry that contains the username information. The default value is cn.

  – **First Name** - defines the attributes of an LDAP entry that contains the user first name information. The default value is givenName.

  – **Last Name** - defines the attributes of an LDAP entry that contains the user last name information. The default value is sn.

> – **Mail** - defines the attributes of an LDAP entry that contains the mail information. The default value is `mail`.

- When connecting to LDAP over SSL, you must import the LDAP Server CA certificate.

11.5.1.1 Importing the LDAP Server Certificate

When connecting to LDAP over SSL, you must import the LDAP Server CA certificate to `cacerts`, the certificate store, of the Oracle Test Manager server.

To import the LDAP Server CA certificate:

1. Obtain the LDAP Server CA certificate file from the LDAP server administrator and save it to a temporary location on the OATS server.

2. Enter the following command on the OATS server:

   ```
   c:\OracleATS\jdk\jre\bin>keytool -import -trustcacerts -alias maxcrcCA -file
   c:\temp\maxcrc.pfx -keystore c:\oracleATS\jdk\jre\lib\security\cacerts
   -storepass changeit
   ```

   where `maxcrcCA` is the certificate alias and `maxcrc.der` is the certificate file name.

3. Enter Yes at the prompt, `Trust this certificate? [no]:`.

4. Verify the certificate was added to keystore.

5. Once the certificate is imported successfully, restart 'Oracle ATS Server' service and connect to LDAP over SSL using the OATS Adminstrator.

11.5.2 Steps for Implementing LDAP User Authentication for Oracle Test Manger

This section provides an overview of the steps that should be followed to implement LDAP user authentication for Oracle Test Manager.

11.5.2.1 New Users

The following steps are for OATS Administrators who are installing the Oracle Application Testing Suite for the first time and want to implement LDAP authentication but do not have an existing base of Oracle Test Manager users.

1. An OATS Administrator sets up the LDAP server configuration in the Oracle Application Testing Suite Administrator and enables LDAP Authentication. See Specifying LDAP Properties and Setting Up an LDAP Server Configuration - New Users for additional information.

2. An OATS Administrator maps LDAP groups to Oracle Test Manager projects and roles in the Oracle Application Testing Suite Administrator. See Mapping LDAP Groups to Oracle Test Manager Projects and Roles for additional information.

3. An OATS Administrator notifies Oracle Test Manager users that LDAP Authentication is implemented and users should use their LDAP username and password to log into Oracle Test Manager.

11.5.2.2 Upgrading Users

The following steps are for OATS Administrators who have an existing base of Oracle Test Manager users with login credentials currently being used.

1. An OATS Administrator sets up the LDAP server configuration in the Oracle Application Testing Suite Administrator but DOES NOT enable LDAP

Authentication yet. See Specifying LDAP Properties and Setting Up an LDAP Server Configuration - Upgrading Users for additional information.

2. An OATS Administrator maps LDAP groups to Oracle Test Manager projects and roles in the Oracle Application Testing Suite Administrator. See Mapping LDAP Groups to Oracle Test Manager Projects and Roles for additional information.

3. An OATS Administrator notifies existing Oracle Test Manager users that LDAP Authentication will be implemented and provides existing users with a time frame in which to add their LDAP username to Oracle Test Manager. The time frame can be any time frame decided by An OATS Administrator implementing LDAP authentication.

4. An OATS Administrator instructs existing Oracle Test Manager users to specify their LDAP username in the Oracle Test Manager User Options (Select **Options** from the Oracle Test Manager **Tools** menu and then select **User Information**. Enter the LDAP user name and click **Save**.) Users should continue to use their Oracle Test Manager username and password to log in to Oracle Test Manager until LDAP Authentication is enabled by an OATS Administrator for Oracle Test Manager.

5. After the specified notification time frame, an OATS Administrator enables LDAP Authentication in the Oracle Application Testing Suite Administrator. See Enabling LDAP User Authentication for additional information. Once LDAP Authentication is enabled, OATS Administrator notifies all existing Oracle Test Manager users to begin using their LDAP username and password to log into Oracle Test Manager.

11.5.3 Setting Up an LDAP Server Configuration - New Users

The LDAP server configuration must be specified by an Oracle Test Manager administrator to define the LDAP server to use for user authentication.

To set up the LDAP server configuration for OATS Administrators of a new installation that does not have an existing base of Oracle Test Manager users:

1. Start the Oracle Application Testing Suite Administrator and log in with Administrator credentials.

2. Select **Setup LDAP Config** from the **Tools** menu.

3. Enter the LDAP Server name.

4. Enter the LDAP server port number.

5. Specify the LDAP Base DN (for example, dc=maxcrc,dc=com).

6. Specify the LDAP security level.

7. Specify the LDAP User DN (for example cn=manager,dc=maxcrc,dc=com).

8. Specify the LDAP User password.

9. Select **Activate LDAP Authentication**.

10. Click **OK**.

11.5.4 Setting Up an LDAP Server Configuration - Upgrading Users

The LDAP server configuration must be specified by an Oracle Test Manager administrator to define the LDAP server to use for user authentication.

To set up the LDAP server configuration for OATS Administrators who have an existing base of Oracle Test Manager users with Oracle Test Manager login credentials currently being used:

1. Start the Oracle Application Testing Suite Administrator and log in with Administrator credentials.

2. Select **Setup LDAP Config** from the **Tools** menu.

3. Enter the LDAP Server name.

4. Enter the LDAP server port number.

5. Specify the LDAP Base DN (for example, dc=maxcrc,dc=com).

6. Specify the LDAP security level.

7. Specify the LDAP User DN (for example cn=manager,dc=maxcrc,dc=com).

8. Specify the LDAP User password.

> **Note:** DO NOT enable LDAP User Authentication until after the time frame provided to users to specify their LDAP username in the Oracle Test Manager User Options.

9. Click **OK**.

11.5.5 Mapping LDAP Groups to Oracle Test Manager Projects and Roles

LDAP Groups must be mapped to Oracle Test Manager Projects and Roles to provide users with specific access rights within Oracle Test Manager.

To map LDAP groups to Oracle Test Manager Project and Roles:

1. Start the Oracle Application Testing Suite Administrator and log in with Administrator credentials.

2. Select the **Projects** tab.

3. Click **Map LDAP**. The LDAP Group Mapping Details dialog box has the following options:

   - **All LDAP Groups** - lists the LDAP groups available for the specified LDAP Server configuration.

   - **Selected LDAP Groups** - lists the LDAP groups selected from the **All LDAP Groups** list.

   - **Project** - specifies the Oracle Test Manager project to map to the selected LDAP Group.

   - **Role** - specifies the Oracle Test Manager user role to map to the selected LDAP Group.

4. Select the group name in the left pane.

5. Click the right arrow button (>) to add the group to the **Selected LDAP Groups** list.

6. Select the Project and Role to map to the group.

7. Repeat steps 4, 5, and 6 to add additional groups to the **Selected LDAP Groups** list and map the Project and Role to the group.

8. Click **OK**.

11.5.6 Enabling LDAP User Authentication

For OATS Administrators who have an existing base of Oracle Test Manager users with Oracle Test Manager login credentials currently being used, enable LDAP User Authentication after the specified notification time frame. An OATS Administrator activates LDAP Authentication in the Oracle Application Testing Suite Administrator.

To activate LDAP user authentication after a notification period:

1. Start the Oracle Application Testing Suite Administrator and log in with Administrator credentials.

2. Select **Setup LDAP Config** from the **Tools** menu.

3. Select **Activate LDAP Authentication**.

4. Click **OK**.

11.5.7 Synchronizing LDAP Users

OATS Administrators can use the **Sync LDAP Users** option to keep Oracle Test Manger users in sync with user changes to the LDAP server. The **Sync LDAP Users** option only applies if using LDAP authentication.

To synchronize LDAP Oracle Test Manager users with the LDAP server:

1. Start the Oracle Application Testing Suite Administrator and log in with Administrator credentials.

2. Select **Sync LDAP Users** on the **Users** tab.

11.5.8 Specifying LDAP Properties

In the case of LDAP servers that have multiple CN entries under an LDAP group, you may need to configure group and user attributes in the **Setup LDAP Configuration** dialog box. For LDAP users, Oracle Test Manager retrieves username, first name, last name and mail from LDAP entries on the server when adding them to the Oracle Test Manager database. See Section 11.5.1, "Prerequisites" for additional information.

11.6 Managing Default Reports

You can select the default reports that are available for each user on the Reports tab in Oracle Test Manager. To manage default reports:

1. Select **Manage Default Reports** from the **Tools** menu.

Users - lists the users. You can select more than one user using the Shift and Ctrl keys.

Check all - selects all reports.

Uncheck all - deselects all reports.

Visible - when checked, the report will be available to the selected user(s). When unchecked, the report will not be available to the selected user(s).

Reports - displays the report names.

2. Select the user(s) that you want configure reports for. Use the Shift and Ctrl keys to select more than one user.

3. Select the reports that you want to be available to the user(s) on the Reports tab in Oracle Test Manager.

4. Click **Apply**.

5. Click **OK**.

11.7 Working With Users

After you add a user you can then assign roles to the user for each project in the database.

11.7.1 Adding Users

To add users:

1. Click the **Users** tab.

2. Click **Add**. The Add User dialog box is displayed.

   The Add user dialog box has the following options:

   First Name - enter the user's first name.

   Last Name - enter the user's last name.

   E-mail - enter the user's email address for receiving email notifications.

   Username - enter the username for logging on.

   Password - enter the user's password.

   Confirm Password - re-enter the user's password to confirm that it is correct.

   Enable E-mail notification - select this option to enable email notification when new issues are created and when the owner or assigned to fields are changed for issues.

   Enable Administrator Access - gives this user the ability to log on to the Administrator for managing the database.

3. Enter the user's first name.

4. Enter the user's last name.

5. Enter the username that the user will use to log in.

6. Enter the user's password.

7. Confirm the user's password.

8. Click **OK**. You can now edit the user's project permissions by selecting the project and clicking **Edit**.

11.7.2 Deleting Users

To delete a user:

1. Click the **Users** tab.

2. Select the user you want to delete.

3. Click **Delete**.

4. Click **Yes** when asked to confirm.

11.7.3 Restoring Users

You can restore a previously deleted user to the user list. To restore users:

1. Click **Restore**.

2. Enter the Username of the user to restore.

3. Click **OK**.

11.7.4 Changing User Information

To change a user's name, login user name, password, or enable email notification:

1. Click the **Users** tab.

2. Select the user whose information you want to change and click **Edit**.

3. Make the necessary changes.

4. Click **OK**.

11.7.5 Assigning Roles to Users

Roles determine the project permissions that each user has for a project. Project permissions determine what users can do within the project. Read, write, and delete permissions are assigned to the project, requirements, tests cases, and issues within each project. Execute permission is also assigned to test cases. To assign roles to one user for all projects:

1. Select the **Projects** tab.

2. Select the user for whom you want to assign roles.

3. Select the projects for which you want to assign roles for the selected user. Only the selected projects will be displayed in the Edit Roles dialog box.

4. Click **Assign**.

   Username - displays the user for whom you are assigning roles.

   All - selects or deselects all of the listed projects.

   Apply to all selected - applies the selected role to all of the selected projects. If none is selected, the user will not have access to those project.

   Checkbox - indicates if the project is selected.

   Project - lists the projects that you previously selected on the User tab.

   Role - select the role to assign to this user for the project. If none is selected, the user will not have access to this project.

5. Select the role to assign to this user for each project.

6. Click **OK**.

11.8 Working With Roles

The Roles tab is where you configure roles. Roles determine the read, write, delete, and execute permissions for users in projects. Once roles are created, you assign them to users for each project that you want them to have access to. A user's role can differ from project to project. Click **Assign** on either the Projects tab or Users tab to assign roles.

11.8.1 Adding Roles

To add a role:

1. Click the **Roles** tab.

2. Click **Add**.

    Name - enter a name for this role.

    Description - enter a description for this role.

    Base Role - when you select an existing role, the permissions for that role can be used to start configuring the new role.

    Select All - selects all permissions.

    Select None - deselects all permissions.

    The following permissions are available for the project, requirements, test cases, issues, and reports:

    ■   **Read** - indicates whether users assigned to this role has read access to the project, requirements, tests, issues, public reports, and private reports.

    ■   **Write** - indicates whether users assigned to this role can change the project, requirements, tests, issues, public reports, and private reports.

    ■   **Delete** - indicates whether users assigned to this role can delete the project, requirements, tests, issues, public reports, and private reports.

    ■   **Execute** - indicates whether users assigned to this role can execute tests.

    ■   **Set/Override results** - indicates whether users assigned to this role can set or override test results for tests and Test Sets.

3. Enter a name and description for this role.

4. Adjust the permissions for this role.

5. Click **OK**.

11.8.2 Editing Roles

To edit a role:

1. Click the **Role** tab.

2. Select the role you want to edit.

3. Click **Edit**.

4. Make any changes.

5. Click **OK**.

11.8.3 Deleting Roles

When you delete roles, Oracle Test Manager checks to see if the role is being used, that is, if it is assigned to a user. If the role is in use, you will be prompted to assign another role to the users assigned to the role. To delete roles:

1. Click the **Roles** tab.

2. Select the role that you want to delete.

3. Click **Delete**.

4. If the role is not in use, click **Yes** when asked to confirm the deletion. Otherwise the Assign Role dialog box is displayed.

   Username - displays the users that are assigned to this role.

   Project Name - displays the project for which the users are assigned this role.

   Please choose a role for re-assignment - select the role that you want to use instead of the role you are deleting. The default is none.

   Are you sure you want to delete the role <role> - click **Yes** to delete the role and reassign the new roles to the user. Click **No** to exit without deleting the role.

5. Select the new role to assign to the users assigned to the role you are deleting.

6. Click **Yes**.

11.9 Working With Projects

You can add, clone, rename, assign roles to users for the project, and delete projects from the database.

11.9.1 Adding Projects

To add a project:

1. Select the **Projects** tab.

2. Click **Add**.

   This dialog box has the following options:

   New Project - enter the name of the new project.

   Enable History Tracking - when selected, history tracking audit trails are enabled for the project. The audit trails track changes to every node for almost every field. This results in additional rows in the Oracle Test Manager Database which may eventually cause some performance degradation.

   When cleared, history tracking audit trails are disabled for the project and Oracle Test Manager updates only the last activity for a given tree node. The history will be available only to the last activity. If the setting is enabled again to start tracking history, activities going forward from that point in time will be available in the history window. The activities for the duration when the history tracking was disabled are *not* tracked and will *not* be available or visible.

3. Enter the project name.

4. Select or clear the **Enable History Tracking** options.

5. Click **OK**.

11.9.2 Cloning Projects

Cloning a project lets you copy an existing project and then modify it so that you do not have to do all of the configuration from scratch. Cloning a project copies the project structure including the fields and assignments. You can select which data to clone.

> **Note:** Cloning from different databases is not supported. If you need to clone data between different Oracle Test Manager databases, export a database dump from one database and then import the dump file into the new database. See the Oracle Database Utilities documentation for additional information about using the original Export (`exp`) and Import (`imp`) utilities and the Data Pump Export (`expdp`) and Data Pump Import (`impdp`) utilities.

To clone a project:

1. Click the **Projects** tab.

2. Select the project that you want to clone.

3. Click **Clone**.

   Clone Project - shows the name of the project to clone.

   Copy Test Plans - when selected, all test plan data in the project being cloned is are copied to the new project.

   Copy Requirements - when selected, all Requirements data in the project being cloned is copied to the new project.

   Copy Tests - when selected, all Tests data in the project being cloned is copied to the new project.

   Copy Test Sets - when selected, all Test Set data in the project being cloned is copied to the new project.

   Copy Issues - when selected, all Issues data in the project being cloned is copied to the new project.

   Copy Reports & Dashboard - when selected, all Report and Dashboard data in the project being cloned is copied to the new project.

   Copy Test Run History - when selected, all Test Run History data in the project being cloned is copied to the new project.

   Enable History Tracking - when selected, History Tracking is enabled for the new project.

4. Enter the project name.

5. Select the modules to clone to the new project.

6. Click **OK**. The Clone Result window appears when the cloning process is finished.

11.9.2.1 Terminating a Long Running Transaction

The system clones data sequentially. If the schema is large enough and cloning is in progress and you want to terminate the process, then delete the Target project (**_projectname_ cloning in progress**) to stop the system from cloning additional data.

There may be situations where the database is not able to support cloning due to resource constraints. In this situation, even after deleting the project, the system does not stop the process, then run the following SQL query:

```
SELECT SID, SERIAL#, opname, SOFAR, TOTALWORK,ROUND(SOFAR/TOTALWORK*100,2)
COMPLETE   FROM   V$SESSION_LONGOPS WHERE TOTALWORK != 0 AND    SOFAR != TOTALWORK
order by 1;
```

The above query provides the long running transaction with sid (sessionid). Kill the session by running the following query:

```
alter system kill session <sid>;
```

11.9.3 Renaming Projects

To rename a project:

1. Select the **Projects** tab.

2. Select the project you want to edit.

3. Click **Edit**.

4. Enter the new name.

5. Click **OK**.

11.9.4 Deleting Projects

To delete a project:

1. Click the **Projects** tab.

2. Select the project you want to delete.

3. Click **Yes** when asked to confirm.

11.9.5 Assigning Roles to Project Users

Roles determine the project permissions that each user has for a project. Project permissions determine what users can do within the project. Read, write, and delete permissions are assigned to the project, requirements, tests cases, and issues within each project. Execute permission is also assigned to test cases. To assign roles to one project for all users:

1. Click the **Projects** tab.

2. Select the project for which you want to assign roles.

3. Select the users for which you want to assign roles. Only the selected users will be displayed in the Edit Role dialog box.

4. Click **Assign**.

   Project - displays the project for which you are assigning roles.

   All - selects or deselects all of the listed users.

   Apply to all selected - applies the selected role to all of the selected users. If none is selected, the user will not have access to those project.

   Checkbox - indicates if the user is selected.

   User - displays the users that you selected on the **Projects** tab.

   Role - select the role to assign to this user for the project. If none is selected, the user will not have access to this project.

5. Select the role to assign to each user for this project.

6. Click **OK**.

11.10 Working With Fields

Fields are used in Oracle Test Manager to describe issues, requirements, and tests. There are two types of fields that apply separately to requirements, tests, issues, and test runs:

Default fields - these are fields that come with the product such as Type, Priority, and Status for requirements. You cannot add or delete default fields. You can change whether they are required or enabled, and you can add, delete, or rename their associated options.

Custom fields - these are fields that you add that are specific to your product. For each custom field, you define its properties, then add options where appropriate.

Role-Based Field Security

Role-based field security settings specify which roles have read/write permissions and which roles have read-only permissions for specific fields. When you add or edit fields or field options, a **Permissions** link in the dialog box provide access to the Permissions settings for the selected field or field option.

11.10.1 Adding Options

Before adding custom fields, make sure to logout and close Oracle Test Manager. When finished adding custom fields, logout and close the Administrator before starting Oracle Test Manager.

To add an option to a default or custom field:

1. Click the **Fields** tab.

2. Select **Default Fields** or **Custom Fields** for the category of the field to which you want to add an option.

3. Select the field to which you want to add an option.

4. Click **Add** to the right of the Option Lists section. The New Option dialog box has the following options:

    Name - enter the name of the new option.

    Permissions - opens a dialog box for setting the role-based field security settings for the field.

    Insert the new option at the top of list - when selected, the new option appears at the top of the list. When cleared, the new option appears just below the currently selected item in the **Option List**. If you want to have a new item appear in a specific location in the option list, close the Add Option dialog box, select the option in the **Option List** that you want the new option to appear after, then click **Add**. Leave this **Insert the new option at the top of list** checkbox cleared when adding the new option.

5. Enter the name of the new option.

6. Click **Permissions** if you want to specify which roles have read/write or read-only access to the option. Move the roles to the desired permissions using the arrow buttons and click **OK**.

7. Select the **Insert the new option at the top of list** option if you want the new option to appear at the top of the list. Clear the **Insert the new option at the top of list** option if you want the new option to appear after the currently selected option in the **Option List**.

8. Click **OK**. Use the arrow buttons to reorder the list. The order in which they appear in this list is the order in which they will appear in the drop down option lists in Oracle Test Manager.

> **Note:** The order of the priority field for requirements determines the color of the icons displayed in Test Manager. For example, if High priority is first in the list, the icon will be green. Following is a list of colors and the corresponding display orders:
>
> 1 -Green
>
> 2-Orange
>
> 3-Red
>
> 4-Blue
>
> 5-Silver
>
> 6-Purple
>
> 7-Dark Orange
>
> 8-Light Blue
>
> 9-Gray

11.10.2 Renaming Options

To rename an option:

1. Click the **Fields** tab.

2. Select **Default Fields** or **Custom Fields** for the category of the field containing the field with the option you want to change.

3. Select the field containing the option you want to change.

4. Select the option you want to rename.

5. Click **Edit**.

6. Enter the new name.

7. Click **Permissions** if you want to specify which roles have read/write or read-only access to the option. Move the roles to the desired permissions using the arrow buttons and click **OK**.

8. Click **OK**. Use the arrow buttons to reorder the list. The order in which they appear in this list is the order in which they will appear in the drop down option lists in Oracle Test Manager.

11.10.3 Deleting Options

> **Note:** If you delete a custom field option that has been used in a requirement, test, or issue, Oracle Test Manager will default the custom field to the first value in the option list the next time you edit the requirement, test, or issue. For requirements, tests, or issues that have not been edited and saved, the original value will remain unchanged.

To delete an option:

1. Click the **Fields** tab.

2. Select **Default Fields** or **Custom Fields** for the category of the field containing the field with the option you want to delete.

3. Select the field containing the option you want to delete.

4. Select the option you want to delete.

5. Click **Delete**.

6. Click **Yes** when asked to confirm the deletion.

11.10.4 Editing Default Fields

You can edit whether a default field is required, enabled, triggers an email when changed, and whether it is included in the email. To edit a default field:

1. Click the **Fields** tab.

2. Select **Default Fields** in the left pane for the category of the field you want to edit.

3. Select the field you want to edit.

4. Click **Edit** to display the Edit Field dialog box.

   This dialog box has the following options:

   Name - displays the field name.

   Label - displays the field label that is displayed in Oracle Test Manager.

   Permissions - opens a dialog box for setting the role-based field security settings for the field.

   Field Properties - select a property to enable it; deselect the property to disable it.

   ■ **Required** - requires that the field be entered in Oracle Test Manager when selected.

   ■ **Enabled** - indicates whether the field is used in Oracle Test Manager.

   ■ **Trigger Email Notification** - indicates whether an email will be sent to the configured recipients when this field changes. Click the pencil icon to display the Setup E-mail Configuration dialog box for configuring email recipients. The logged in user should not be the same as the username that is specified for the trigger. The trigger checks the email address of the user who changes the field and does not send notification to any users with the same email address.

   ■ **Include this field in notification mails** - indicates whether the field should be included in notification emails.

5. Click **Permissions** if you want to specify which roles have read/write or read-only access to the option. Move the roles to the desired permissions using the arrow buttons and click **OK**.

6. If you select Trigger Email Notification, the Setup E-mail Configuration dialog box for this field is displayed.

   Projects - select the projects for which you want to configure this field.

   Checkbox - when checked, notification email will be sent to all users assigned tot his role.

Roles - lists the roles. Users assigned the selected role(s) will receive email notifications if they have email notifications enabled as part of their user configuration.

E-mail - enter the email addresses of the people you want to receive notification emails, separated by commas or click **To** to select from a list of users who have email notifications enabled as part of their user configuration.

To - displays the Select Email recipients dialog box for selecting email recipients. The Select email recipients list includes email addresses of the users who have email notifications enabled as part of their user configuration.

Set - saves the settings for the selected project.

7. Select the project for which you want to configure this field.

8. Select a role if you want all users assigned to the role to receive a notification email.

9. Enter the email addresses of recipients or click **To** to select from the list of users in the database that have email notification enabled.

    <recipient list> - lists users in your database that have email notification enabled.

    Select - adds the selected recipients to the To field.

    To - displays the selected recipients separated by a comma.

10. Select the recipients you want to add and click **Select** and then click **Done**.

11. Click **Set** to save the email settings for the selected project.

12. Click **OK** to close the Setup E-mail Configuration dialog box.

13. Make any other changes and click **OK** to close the Edit Field dialog box.

11.10.5 Adding Custom Fields

To add a custom field:

1. Click the **Fields** tab.

2. Select **Custom Fields** in the left pane for the category to which you want to add a custom field.

3. Click **Add** to display the Add Custom Field dialog box.

    This dialog box has the following options:

    Name - enter the name of the field.

    Label - enter the field label that will appear in the Oracle Test Manager dialog boxes.

    Permissions - opens a dialog box for setting the role-based field security settings for the field.

    Type - select the type of field. The options are:

    - **Option List** - lets you select an option from a list. You must add at least one option before exiting the Administrator.

    - **Option List/Text** - lets you select an option from a list or enter text.

    - **User List** - creates a list of the users in the database and lets you select one.

    - **Text** - lets you enter one line of text.

- **Multiline Text** - lets you enter multiple lines of text.

- **Multiline/Append** - creates a multiline text field and when editing, lets you choose to append new text to existing text. If you choose to append, the date and user name are automatically added.

- **Heading** - lets you create a heading for grouping custom fields. The heading is for display purposes only in the right-hand pane of Oracle Test Manager.

Applies To - select the project to which this field applies.

Properties - select the properties that apply to this field.

- **Required** - indicates whether the field must be entered.

- **Enabled** - indicates whether to make this field available to Oracle Test Manager. Disabled fields are not available in Oracle Test Manager.

- **Trigger Email Notification** - indicates whether an email will be sent to the configured recipients when this field changes. Click the pencil icon to display the Setup E-mail Configuration dialog box for configuring email recipients. The logged in user should not be the same as the username that is specified for the trigger. The trigger checks the email address of the user who changes the field and does not send notification to any users with the same email address.

- **Include this field in notification mails** - indicates whether the field should be included in notification emails.

- **Project Specific Options** - when selected, you can add options specifically for each project by selecting the project in the Option Lists section. If not selected, all projects will have the same options.

4. Click **Permissions** if you want to specify which roles have read/write or read-only access to the option. Move the roles to the desired permissions using the arrow buttons and click **OK**.

5. If you select Trigger Email Notification, the Setup E-mail Configuration dialog box for this field is displayed.

   Projects - select the projects for which you want to configure this field.

   Checkbox - when checked, notification email will be sent to all users assigned tot his role.

   Roles - lists the roles.

   E-mail - enter the email addresses of the people you want to receive notification emails, separated by commas.

   To - displays the Select Email recipients dialog box for selecting email recipients.

   Set - saves the settings for the selected project.

6. Select the project for which you want to configure this field.

7. Select a role if you want all users assigned to the role to receive a notification email.

8. Enter the email addresses of recipients or click **To** to select from the list of users in the database that have email notification enabled.

   <recipient list> - lists users in your database that have email notification enabled.

   Select - adds the selected recipients to the To field.

   To - displays the selected recipients separated by a comma.

9. Select the recipients you want to add and click **Select**.

10. Click **Done**.

11. Click **OK**.

12. Enter other field information.

13. Click **OK**. For list type items, enter the options that will appear in the list. If you have add an Option List, you must enter at least one option before exiting the Administrator.

11.10.6 Editing Custom Fields

To edit a custom field:

1. Click the **Fields** tab.

2. Select **Custom Fields** in the left pane for the category containing the field you want to edit.

3. Select the field you want to edit.

4. Click **Edit** to display the Edit Field dialog box.

5. Make the necessary changes.

6. Click **OK**.

11.10.7 Deleting Custom Fields

To delete a custom field:

1. Click the **Fields** tab.

2. Select **Custom Fields** in the left pane for the category containing the field you want to delete.

3. Select the field you want to delete.

4. Click **Delete**.

5. Click **Yes** when asked to confirm the deletion.

11.11 Maintaining the Database

You can unlock locked records and purge deleted records.

11.11.1 Unlocking Locked Records

Use this procedure to clear out locks in the database when the product fails and leaves entries locked for editing. To unlock locked records:

1. Select **Unlock Locked Records** from the **Tools** menu.

2. Click **Yes** to confirm.

11.11.2 Purging Deleted Records

Deleted items are not removed from the database until you purge the database. To remove deleted items from the database:

1. Select **Purge Deleted Records** from the **Tools** menu.

2. Click **Yes** to confirm that you want to purge the database.

11.12 Using the Reset Password Utility

The Reset Password utility allows the installing user of the Oracle Application Testing Suite web applications to reset the password for the Administrator account in an Oracle Load Testing or Oracle Test Manager database.

The installing user of the Oracle Application Testing Suite can reset the password for:

■   Oracle Load Testing Administrator user

■   Oracle Test Manager Administrator user

The default Administrator user password is the password specified during the Oracle Application Testing Suite installation.

See the *Oracle Application Testing Suite Installation Guide* for additional information about using the Reset Password utility.

A

Oracle Test Manager API Reference

This appendix provides a basic reference for the methods in the Oracle Test Manager Application Programming Interface (API).

A.1 Introduction

The Oracle Test Manager Application Programming Interface provides two methods for accessing Oracle Test Manager programmatically:

- through a Java API that is built on top of the web service
- directly through a web service

The Java API resides in the otm_external_api.jar and exposes the necessary classes for interacting with Oracle Test Manager through the oracle.oats.otm.external.api package.

The otm_external_api.jar is installed to the <installDir>\openScript\otm folder.

This guide provides basic instructions for using the Java API and the web service. See also the Oracle Test Manager API Javadoc reference pages installed in <installDir>/openScript/otm/docs/api/index.html for additional information and examples.

A.2 Oracle Test Manager API Reference

The following section provides an alphabetical listing of the classes in the Oracle Test Manager API.

A.2.1 Alphabetical OTM API Class Listing

The following table lists the Oracle Test Manager API classes in alphabetical order.

Table A–1   List of Oracle Test Manager External API Classes

Method	Description
AbstractManager.java	The abstract class for all **Manager** classes.
Asset.java	Provides the basic object that OTM uses to work with Issues, Requirements, TestCases, TestPlans, and TestSets.
AssetIterator.java	An Iterator implementation that retrieves the asset by its queryFilter and sorted by sortFilter in the page size as the "fetch_size" property in the Configuration. defined.
AssociationList.java	A list that encapsulated Asset associations with get/size methods and internal cache mechanism.

Table A–1   (Cont.) List of Oracle Test Manager External API Classes

Method	Description
Attachment.java	Provides methods to get Assets. An Attachment is either a binary file that an asset has or an URL/Link that an Asset contains.
config.properties	Stores the Property setting(s).
Configuration.java	An encapsulated Properties class that loads properties from "config.properties" file.
ExternalAPIUtil.java	Used for sharing session across the WS-API calls.
Field.java	Provides methods for getting Field properties. Field is used as a meta data for an Asset.
fields.properties	Stores the Field setting(s).
FilterCriteria.java	The Filter Criteria is an abstraction of querying the Asset by A Field.
Folder.java	A Folder is a type of Asset and Test Case that usually presents a Test Case parent when creating the children TestCases.
IManagedObject.java	ManagedObject Interface is an interface that describes the object that can be managed with Create, Read, Update, Delete operations.
Issue.java	Provides methods for saving, deleting, and getting associated test cases and issues. An Issue is a type of Asset that can be used to track the problems during development.
IssueManager.java	The manager that does the Create, Read, Update, Delete operations for Issue asset.
package-info.java	Provides the JAX-WS API for Oracle Test Manager.
Project.java	A project is a collection of its Assets and reference of initialized TestManager. Users can centralize the usage of {AbstractManager then use those Managers to retrieve the Asset.
Requirement.java	Provides methods saving, deleting, and getting associated test cases for Requirements. Requirement is a type of Asset that can be used to track the specifications of software development.
RequirementManager.java	The manager that does the Create, Read, Update, Delete operations for Requirement assets.
TestCase.java	TestCase is a type of Asset that Oracle Test Manager maintains. Test cases can include multiple TestSteps and can execute TestRuns..
TestCaseManager.java	The manager that does the Create, Read, Update, Delete operations for TestCase assets.
TestManager.java	TestManager is used when initializing the testing session. It provides for authentication, field manipulation, and general Asset resolution.
TestPlan.java	The TestPlan is a type of Asset that can be used to track TestCase usage and TestSet execution.
TestPlanManager.java	The AbstractManager of that presents the Create, Read, Update, Delete operations for TestPlans.
TestRun.java	TestRun} represents an action to execute TestCases.
TestRunIterator.java	Iterator for TestRuns.

Table A–1   (Cont.) List of Oracle Test Manager External API Classes

Method	Description
TestRunManager.java	The manager that does the Create, Read, Update, Delete operations for TestRun assets..
TestSet.java	A TestSet Asset is a type of asset that may contains multiple TestCases.
TestSetManager.java	The manager that does the Create, Read, Update, Delete operations for TestSteps.
TestStep.java	The TestStep represents the steps when executing the TestCase.
TestStepIterator.java	Iterator for TestSteps.

The following table lists the Oracle Test Manager WebServices API classes in alphabetical order.

Table A–2   List of Oracle Test Manager WebServices API Classes

Method	Description
AssetDescriptor.java	Java class for assetDescriptor complex type.
AssetObject.java	Java class for assetObject complex type.
Associate.java	Java class for associate complex type.
AssociateResponse.java	Java class for associateResponse complex type.
AttachFile.java	Java class for attachFile complex type.
AttachFileResponse.java	Java class for attachFileResponse complex type.
AttachmentManager.java	Java class for AttachmentManager.
AttachmentManager_Service.java	Java class for AttachmentManager_Service.
AttachmentObject.java	Java class for attachmentObject complex type.
AttachUrl.java	Java class for attachUrl complex type.
AttachUrlResponse.java	Java class for attachUrlResponse complex type.
Authenticate.java	Java class for authenticate complex type.
AuthenticateResponse.java	Java class for authenticateResponse complex type.
DataFieldObject.java	Java class for dataFieldObject complex type.
DeleteAttachment.java	Java class for deleteAttachment complex type.
DeleteAttachmentResponse.java	Java class for deleteAttachmentResponse complex type.
DeleteIssue.java	Java class for deleteIssue complex type.
DeleteIssueResponse.java	Java class for deleteIssueResponse complex type.
DeleteRequirement.java	Java class for deleteRequirement complex type.
DeleteRequirementResponse.java	Java class for deleteRequirementResponse complex type.
DeleteTestCase.java	Java class for deleteTestCase complex type.
DeleteTestCaseResponse.java	Java class for deleteTestCaseResponse complex type.
DeleteTestPlan.java	Java class for deleteTestPlan complex type.
DeleteTestPlanResponse.java	Java class for deleteTestPlanResponse complex type.

Table A–2   (Cont.) List of Oracle Test Manager WebServices API Classes

Method	Description
DeleteTestRun.java	Java class for deleteTestRun complex type.
DeleteTestRunResponse.java	Java class for deleteTestRunResponse complex type.
DeleteTestSet.java	Java class for deleteTestSet complex type.
DeleteTestSetResponse.java	Java class for deleteTestSetResponse complex type.
DeleteTestStep.java	Java class for deleteTestStep complex type.
DeleteTestStepResponse.java	Java class for deleteTestStepResponse complex type.
Exception.java	Java class for Exception complex type.
Exception_Exception.java	Java class for Exception_Exception.
ExecuteTestCase.java	Java class for executeTestCase complex type.
ExecuteTestCaseResponse.java	Java class for executeTestCaseResponse complex type.
ExecuteTestSetRun.java	Java class for executeTestSetRun complex type.
ExecuteTestSetRunResponse.java	Java class for executeTestSetRunResponse complex type.
FilterCriteriaObject.java	Java class for filterCriteriaObject complex type.
FolderObject.java	Java class for folderObject complex type.
GetAssociations.java	Java class for getAssociations complex type.
GetAssociationsResponse.java	Java class for getAssociationsResponse complex type.
GetAttachments.java	Java class for getAttachments complex type.
GetAttachmentsResponse.java	Java class for getAttachmentsResponse complex type.
GetField.java	Java class for getField complex type.
GetFieldResponse.java	Java class for getFieldResponse complex type.
GetFields.java	Java class for getFields complex type.
GetFieldsResponse.java	Java class for getFieldsResponse complex type.
GetFile.java	Java class for getFile complex type.
GetFileResponse.java	Java class for getFileResponse complex type.
GetIssue.java	Java class for getIssue complex type.
GetIssueResponse.java	Java class for getIssueResponse complex type.
GetRequirement.java	Java class for getRequirement complex type.
GetRequirementResponse.java	Java class for getRequirementResponse complex type.
GetRoot.java	Java class for getRoot complex type.
GetRootResponse.java	Java class for getRootResponse complex type.
GetTestCase.java	Java class for getTestCase complex type.
GetTestCaseResponse.java	Java class for getTestCaseResponse complex type.
GetTestPlan.java	Java class for getTestPlan complex type.
GetTestPlanResponse.java	Java class for getTestPlanResponse complex type.
GetTestRun.java	Java class for getTestRun complex type.
GetTestRunResponse.java	Java class for getTestRunResponse complex type.

Table A–2   (Cont.) List of Oracle Test Manager WebServices API Classes

Method	Description
GetTestSet.java	Java class for getTestSet complex type.
GetTestSetResponse.java	Java class for getTestSetResponse complex type.
GetTestSteps.java	Java class for getTestSteps complex type.
GetTestStepsResponse.java	Java class for getTestStepsResponse complex type.
HierarchicalAssetObject.java	Java class for hierarchicalAssetObject complex type.
IssueManager.java	Java class for issueManager.
IssueManager_Service.java	Java class for issueManager_Service.
IssueObject.java	Java class for issueObject complex type.
LabelValueObject.java	Java class for labelValueObject complex type.
List.java	Java class for list complex type.
ListResponse.java	Java class for listResponse complex type.
ListTestRuns.java	Java class for listTestRuns complex type.
ListTestRunsResponse.java	Java class for listTestRunsResponse complex type.
ListTestStepResults.java	Java class for listTestStepResults complex type.
ListTestStepResultsResponse.java	Java class for listTestStepResultsResponse complex type.
Manager.java	Java class for manger.
Manager_Service.java	Java class for manager_Service.
NewFolder.java	Java class for newFolder complex type.
NewFolderResponse.java	Java class for newFolderResponse complex type.
NewIssue.java	Java class for newIssue complex type.
NewIssueResponse.java	Java class for newIssueResponse complex type.
NewRequirement.java	Java class for newRequirement complex type.
NewRequirementResponse.java	Java class for newRequirementResponse complex type.
NewTestCase.java	Java class for newTestCase complex type.
NewTestCaseResponse.java	Java class for newTestCaseResponse complex type.
NewTestPlan.java	Java class for newTestPlan complex type.
NewTestPlanResponse.java	Java class for newTestPlanResponse complex type.
NewTestRun.java	Java class for newTestRun complex type.
NewTestRunResponse.java	Java class for newTestRunResponse complex type.
NewTestSet.java	Java class for newTestSet complex type.
NewTestSetResponse.java	Java class for newTestSetResponse complex type.
NewTestStep.java	Java class for newTestStep complex type.
NewTestStepResponse.java	Java class for newTestStepResponse complex type.
ObjectFactory.java	Contains factory methods for each Java content interface and Java element interface generated in the oracle.oats.otm.webservices package.
package-info.java	Contains package information.

Table A–2   (Cont.) List of Oracle Test Manager WebServices API Classes

Method	Description
RequirementManager.java	Java class for requirementManager.
RequirementManager_Service.java	Java class for requirementManager_Service.
RequirementObject.java	Java class for requirementObject complex type.
SetField.java	Java class for setField complex type.
SetFieldResponse.java	Java class for setFieldResponse complex type.
StoreTestCase.java	Java class for storeTestCase complex type.
StoreTestCaseResponse.java	Java class for storeTestCaseResponse complex type.
StoreTestStep.java	Java class for storeTestStep complex type.
StoreTestStepResponse.java	Java class for storeTestStepResponse complex type.
TestCaseManager.java	Java class for testCaseManager.
TestCaseManager_Service.java	Java class for testCaseManager_Service.
TestCaseObject.java	Java class for testCaseObject complex type.
TestExecutor.java	Java class for testExecutor.
TestExecutor_Service.java	Java class for testExecutor_Service.
TestPlanManager.java	Java class for testPlanManager.
TestPlanManager_Service.java	Java class for testPlanManager_Service.
TestPlanObject.java	Java class for testPlanObject complex type.
TestRunObject.java	Java class for testRunObject complex type.
TestSetManager.java	Java class for testSetManager.
TestSetManager_Service.java	Java class for testSetManager_Service.
TestSetObject.java	Java class for testSetObject complex type.
TestStepObject.java	Java class for testStepObject complex type.
TestStepResultObject.java	Java class for testStepResultObject complex type.
User.java	Java class for user complex type.

A.3 Sample Oracle Test Manager API Usage

This section provides basic examples of using the Oracle Test Manager API to work with Oracle Test Manager Assets.

A.3.1 Connecting to Oracle Test Manager and Getting the Project

To connect to Oracle Test Manager using the API, create an instance of TestManager and call the authenticate(username, password, project, dataSource) method. For example:

```
import oracle.oats.otm.external.api.*;
//[...]
String url="http://localhost:8088";

String dataSource="OATS_otm_DS";
String projectName="Empty Project";
String username="administrator";
String password="Password01";
```

```
TestManager otm = new TestManager(url);
otm.authenticate(username, password, projectName, dataSource);
```

After user authentication, get the project, as follows:

```
Project proj = otm.getProject();
String prjName = proj.getName();
```

A.3.2 Getting Asset Managers

Use the Asset Managers to obtain an asset in order to do any actions. Use the get[AssetName]Manager() methods to get the managers:

```
IssueManager issueMgr = proj.getIssueManager();
RequirementManager reqMgr = proj.getRequirementManager();
TestCaseManager tcMgr = proj.getTestCaseManager();
TestManager tstMgr = proj.getTestManager();
TestPlanManager tpMgr = proj.getTestPlanManager();
TestRunManager trMgr = proj.getTestRunManager();
TestSetManager tsMgr = proj.getTestSetManager();
```

A.3.3 Working with Assets

Assets are a core concept of the OTM API. All manipulation of data happens through assets. Every asset derives from the Asset class. Each asset has some common methods:

Method	Description
associate(*asset*)	Associates this asset with another asset (for example associating an issue with a requirement).
attach(*file*)	Attaches a file to this asset.
delete()	Deletes this asset.
getAttachments()	Returns a list of attachments associated with this asset.
getChildNodes()	If the asset supports child assets, returns the children of the asset.
getChildNodes(*queryFilter*, *sortFilter*)	If the asset supports child assets, returns the children of the asset that match the *queryFilter* and then sorts the results according to *sortFilter*. See FilterCriteria for description of *queryFilter* and *sortFilter* format).
getField(*field*)	Gets the specified data field.
getFields()	Gets all fields associated with the asset.
getId()	Gets the unique OTM ID associated with the asset.
getLabel()	Gets the name of the asset.
getProject()	Gets the project that the asset is in.
save()	Persists any modifications to this asset in OTM (usually called after modifying fields).

In order to limit the amount of data being transferred, most of the methods that return collections of objects will return iterators that you will need to use to visit the collections. For example:

```
AssetIterator<Issue> issues = issueMgr.getIssues();
```

```
while (issues.hasNext()) {
    Issue issue = issues.next();
    print(issue.getLabel());
}
```

A.3.4 Working with Fields

Fields correspond to OTM `DataField` object metadata that can be associated with an asset. Usually these are things like Priority, Severity, Description, Platform fields that are visible through the UI. You can get the value of a field by calling `getValue()` or set its value by calling `setValue(value)`. You must persist the field through a call to `save()`. See the example below of changing the platform field on a newly created issue:

```
String name = "Issue " + System.currentTimeMillis();
List<DataFieldObject> fields = new ArrayList<DataFieldObject>();
fields.add(new DataFieldObject("Owner", "Administrator User"));
fields.add(new DataFieldObject("Priority", "Low"));
fields.add(new DataFieldObject("Summary", name));
fields.add(new DataFieldObject("Component", "Application"));
fields.add(new DataFieldObject("AssignedTo", "Administrator User"));
fields.add(new DataFieldObject("Status", "1 - Created"));
fields.add(new DataFieldObject("Severity", "Low"));
issueMgr.newIssue(name, fields);
```

A.3.5 Working with Filters

Filters are used to specifically query for data and/or sort the data. Filters operate on a field, take an operator (equal, not equal, contains, greater than, less than or null) and a value and can be chained together with an AND or an OR. Filters can also be case sensitive. Please see the `FilterCriteria` class for more details. An example of using a filter is provided below:

```
TestCase tc = tcMgr.getRoot();

FilterCriteria c2 = new FilterCriteria();
c2.setField("TestCaseId");
c2.setOperator(Operator.equal);
c2.setValue(String.valueOf(tc.getId()));


List<FilterCriteria> filter = new ArrayList<FilterCriteria>();
filter.add(c2);
```

A.3.6 Working with Attachments

Attachments can be created using the `attach(file)` method of any asset that supports attachments. Attachments can be retrieved by simply calling `getAttachments()` on any asset that supports attachments. An attachment can be deleted by calling the `delete()` method on the attachment itself.

The following example creates a few files with random data then does various attachment related operations:

```
File[] files = new File[10];
StringBuilder[] fileContents = new StringBuilder[files.length];

for (int i = 0; i < files.length; i++) {
    files[i] = File.createTempFile("otm_" + i, ".txt");
```

```
    / generate file contents
    fileContents[i] = new StringBuilder();
    for (int j = 0; j < Math.random() * 1000; j++) {
        fileContents[i].append(UUID.randomUUID().toString());
    }
    FileWriter writer = new FileWriter(files[i]);
    writer.write(fileContents[i].toString());
    writer.close();
}

TestCase t = project.getTestCaseManager().newTestCase(testFolder, "Attach Test");

for (int i = 0; i < files.length; i++) {

    t.attach(files[i]);
}

assertEquals(t.getAttachments().size(), files.length);

List<Attachment> attachments = t.getAttachments();
for (int i = 0; i < attachments.size(); i++) {
    Attachment attachment = attachments.get(i);
    logger.debug(attachment.getName());
    File f = attachment.getFile();
    FileReader reader = new FileReader(f);
    char[] contents = new char[(int)f.length()];
    reader.read(contents, 0, contents.length);
    reader.close();
    assertEquals(fileContents[i].toString(), new String(contents));
}

for (int i = 0; i < attachments.size(); i++) {
    Attachment attachment = attachments.get(i);
    attachment.delete();
    assertEquals(t.getAttachments().size(), attachments.size() - (i + 1));
}
```

A.3.7 Accessing Web Services Directly

Pre-generated raw web service Java classes are available in the
oracle.oats.otm.webservices package. These will allow you to make raw web service
calls. You will need to refer to the WSDL definitions for each of the various asset
manager services for the exact message formats. The web services that are exposed are:

/AttachmentManager (generic attachment service)

/IssueManager

/Manager (generic manager service – can handle any asset type)

/RequirementManager

/TestCaseManager

/TestPlanManager

/TestSetManager

/TestExecutor

Note that when you connect to a manager and authenticate, you can maintain that
session when connecting to other managers using the SESSION_MAINTAIN_
PROPERTY property of the binding provider as follows:

```
TestCaseManager_Service service = new TestCaseManager_Service();
TestCaseManager manager = service.getTestCaseManagerPort();
((BindingProvider)manager).getRequestContext().put(BindingProvider.SESSION_
MAINTAIN_PROPERTY, true);

manager.authenticate("administrator", "Password01", "Empty Project", "OATS_otm_
DS");

TestExecutor_Service tes = new TestExecutor_Service();
TestExecutor te = tes.getTestExecutorPort();

// don't have to authenticate, can just immediately call any method
List<TestRunObject> runs = te.listTestRuns(6, "testCase", 0, 0);
```

Index