

IBM ETM

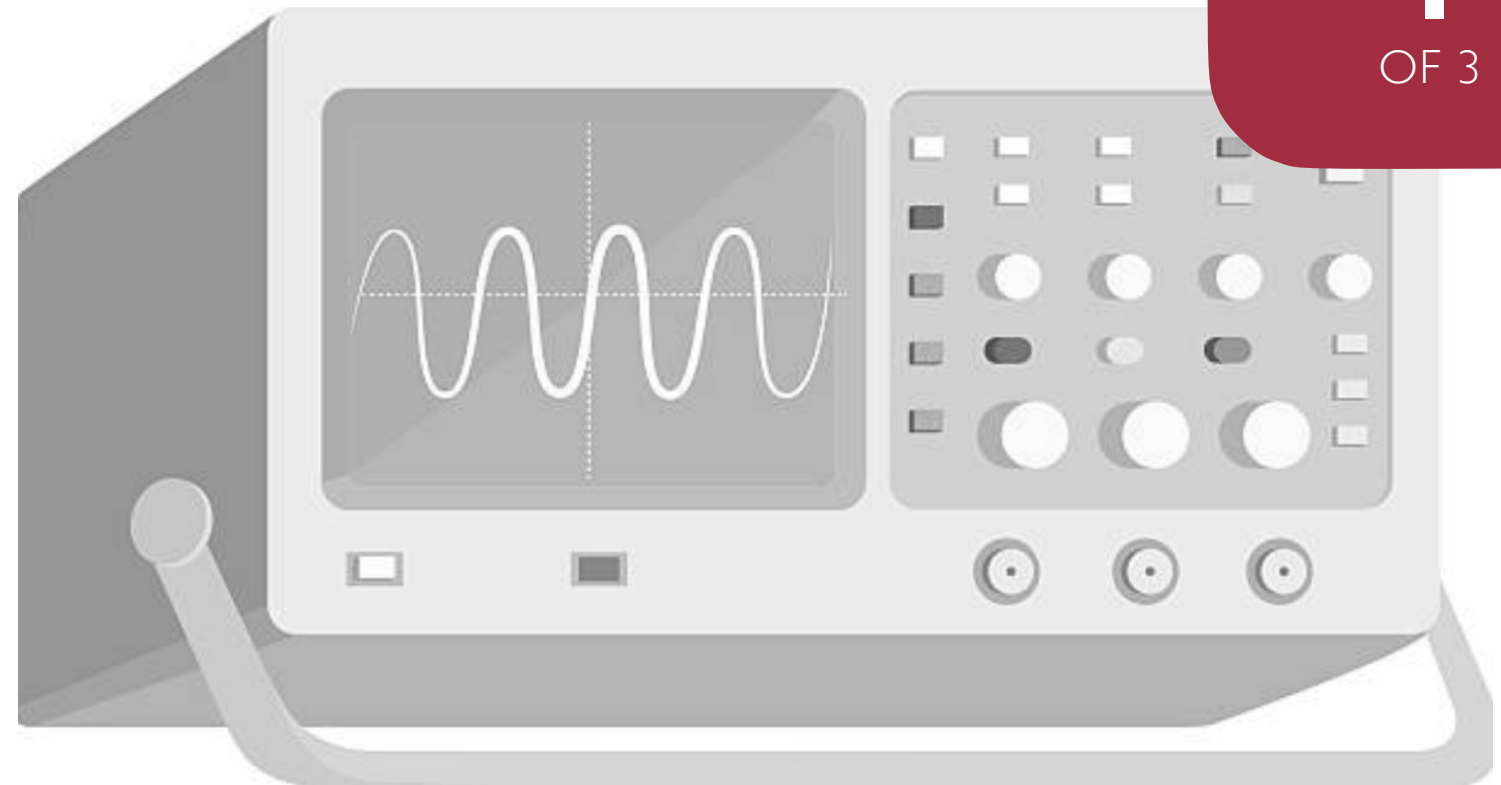
Quick Start Guide

First Steps in ETM,
User Interface,
Definition of Terms

ETM - Getting Started

Before starting with test management, the *most important ETM terms* are explained in this module. Furthermore, the *relationships* between the ETM test artifacts are illustrated here, and it is shown how the ETM world can *work together* with DNG or EWM.

Then we show you how to *start your first ETM project* on a green field site and establish the foundation for successful test management.



Module

I

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I INTRODUCTION

Engineering Test Management (ETM)

IBM Engineering Test Management (ETM) is a comprehensive solution designed for managing and automating the testing process across various stages of the development lifecycle. It provides a unified platform for planning, executing, and tracking tests, helping organizations improve the quality of their products.

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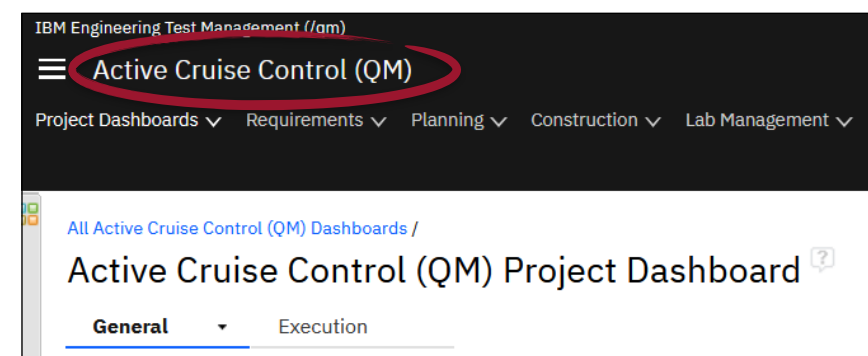
2 MOST IMPORTANT ETM TERMS

Project Area

A **project area** (abbreviation: **PA**) is an area in the repository where information about one or more system development projects is stored. A project area defines the project deliverables, team structure, process, etc. In ETM, you access all test artifacts within the context of a project area.

Each project area has a process, which governs how members work. For example, the project area process defines user roles, permissions assigned to these roles, test artifact workflows and so on.

The **project area name** is displayed in the top left corner of the browser window.



Member

Each user that is part of a project area is added there as a **member**.

Role

A **role** defines the functions of team members. There are predefined roles for ETM but new ones can also be defined or existing deleted or changed.

Permission

A **permission** is a predefined **basic operation** (for example create a test case). For each role it is defined if a single permission is granted or not. For example, the **Create a Test Case** operation is defined per default for the roles **Test Team Member** and **Configuration Lead**.

Role Assignment

Each member in a project area can be **assigned** to one or more **roles**. If more than one role is assigned then the underlying permissions are added up, which means that if one role does not have a permission but another one does, the permission will be granted.

The most important test artifacts and their relationships are explained in the following:

-
- ```
classDiagram
 class TestPlan
 class TestCase
 class TestSuite
 class TestScript
 class Keyword
 class TestData
 class TestCaseExecutionRecord
 class TestSuiteExecutionRecord
 class TestCaseResult
 class TestSuiteResult

 TestPlan --> "0..n" TestCase
 TestPlan --> "0..n" TestSuite
 TestCase --> "0..n" TestScript
 TestCase --> "0..n" TestCaseExecutionRecord
 TestSuite --> "0..n" TestSuiteExecutionRecord
 TestSuite --> "0..n" TestCase
 TestScript --> "0..n" Keyword
 TestScript --> "0..n" TestData
 TestCaseExecutionRecord --> "0..n" TestCaseResult
 TestSuiteExecutionRecord --> "0..n" TestSuiteResult
 TestSuiteExecutionRecord --> "0..n" TestCaseExecutionRecord
 TestSuiteResult --> "0..n" TestSuiteExecutionRecord
 TestCaseResult --> "0..n" TestCase
```

A **test plan** describes the scope of the overall test effort in the test planning process for different kinds of testing, such as functional regression testing, performance testing, system verification testing, globalization testing etc. It serves as the **top-level** container for managing the overall test effort for a particular project or release. It can cover an entire product or a subsystem. Related test plans can be grouped together in a master-child relationship.

A test plan is like a document and consists of different sections that define workflow. Once all sections are complete, the planning activities of the plan can also be considered complete.

Test cases can initially be created completely independently or immediately related to a test plan. If necessary, a test case can also be associated to more (= reuse) test plans. For example if there are two test plans for Release 1 and Release 2 and it is intended that the same test is run for both, then the same test case is reused.

Test scripts can initially be created completely independently or immediately related to a test case. If necessary, a test script can be associated to one or more (= reuse) test cases.

A **keyword** represents a single statement or a collection of steps that can be reused across multiple test scripts. Once created, keywords are stored in a central repository and can be reused in other scripts, eliminating the need to recreate the same procedure. When a keyword is updated, all test scripts using it are automatically updated as well. Keyword-enabled manual scripts can be entirely keyword-based or contain a combination of keywords and individual test steps. You can also automate keywords by linking them to functional test scripts.

To create test data, you import it from a CSV (Comma Separated Values) file. By associating a manual test script with test data, you can replace fixed values in the script with variables. During execution, these variables are replaced with data from the imported CSV file.

## Test Case Execution Record

A **test case execution record** is used to specify the execution environment, default test script and test plan for a specific instance of a test case for execution. When a test case is run, then actually one of its test case execution records is executed. It also stores the last result of all test case results.

## Test Case Result

A **test case result** is created for every single run of a test case execution record. It captures detailed information about what happened during the test execution. One of the most important information that a test case result contains is the execution status, i.e. if the test run is passed, failed, blocked etc.

## Test Suite

A **test suite** is a set of test cases that are grouped for a specific purpose. For example one test suite contains all test cases for a specific scenario (e.g. a regression test) while another test suite contains only a part of them for a smoke test.

Like a test case, a test suite can initially be created completely independently or immediately related to a test plan. If necessary, a test suite can also be associated to more (= reuse) test plans.

In a test suite it is possible to define whether the test cases included are run in a sequence or in parallel.

## Test Suite Execution Record

While a test case execution record represents the execution of a single test case, a **test suite execution record** represents the execution of an entire test suite (i.e., usually several test cases). When a test suite is run, then actually one of its test suite execution records is executed. It also stores the last result of all test suite results.

## Test Suite Result

A **test suite result** is created for every single run of a test suite execution record. It is the outcome of running an entire test suite and represents the overall status of a group of test cases. It also shows the count of how many of individual test cases passed, failed, blocked etc.

## Workflow using ETM

A typical workflow in ABC looks like this:

### 1. Identify requirements

When planning the test effort, you often begin by identifying the project requirements that were used in the development effort.

### 2. Create the test plan

The test plan defines the testing scope by capturing the test requirements, test cases, test execution criteria, and other information for a particular test cycle.

How to work with test plans is explained in *ETM Quick Start Guide 02* in chapter *Working with Test Plans*.

### 3. Create the test cases / test suites

Test cases describe what you are going to test, define preconditions and post-conditions, assign test steps, and record the results of them. The goal is to ensure that all requirements are testable and have corresponding test cases. A test suite is a collection of test cases that are grouped for test execution purposes.

How to work with test cases is explained in *ETM Quick Start Guide 03* in chapter *Working with Test Cases*.

### 4. Develop test scripts

Developing and managing test scripts are essential parts of the Engineering Test Management lifecycle. Test scripts show how testing is done.

How to work with test scripts is explained in *ETM Quick Start Guide 03* in chapter *Working with Test Scripts*.

### 5. Prepare the test run

Develop execution records for test cases and test suites in order to run the tests.

How to work with test cases is explained in *ETM Quick Start Guide 03* in chapter *Working with Test Cases*.

### 6. Run tests

Run test cases / test suites or execution records.

How to work run test cases / test case execution records is explained in *ETM Quick Start Guide 03* in chapter *Run a Test*.

### 7. Report defects

At any time during the test process, the user can submit a defect. For the defect management the tool IBM EWM (Engineering Workflow Management) is typically used.

How to create a defect is explained in *ETM Quick Start Guide 03* in chapter *Run a Test*.

### 8. Track the test effort

You can use the traceability view to track the status of associated requirements and development plans. You can use the execution view and individual test plans to keep track of test case and test suite execution progress.

Explanations regarding this can be found in various chapters of the ETM Quick Start Guides.

### 9. Report and analyze

Reports are used to analyze the test runs and identify trends in the project. Further details are not given here as they exceed the scope of the ETM Quick Start Guides. If you need more information, please contact your Sodi-usWillert representative.

### 3 LINKING BETWEEN ETM AND DNG

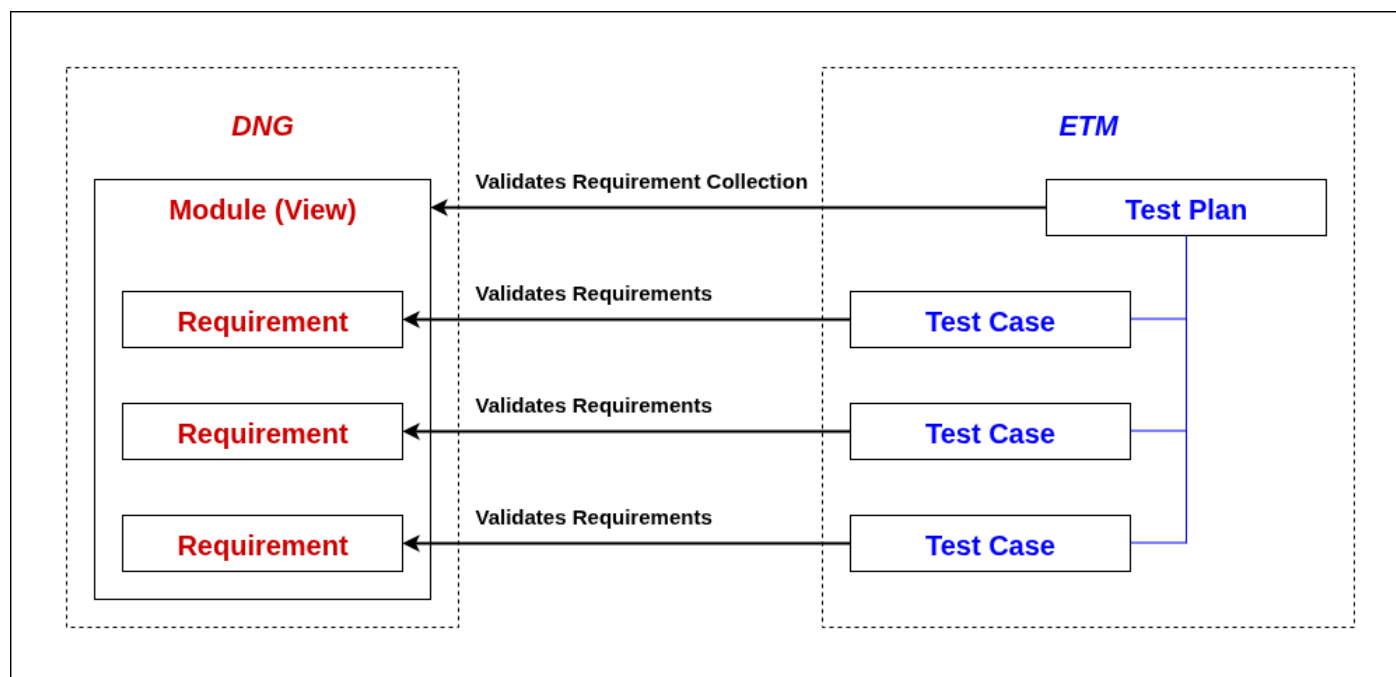
#### Using ETM with DNG

ETM can be used completely independent of other tools. However, it is typically used in combination with IBM DNG. For more information about DNG, see DNG Quick Start Guides or contact your SodiusWillert representative.

#### Linking Test Plans to Modules and Test Cases to Requirements

Using both tools together offers the advantage of linking the requirements to be tested to the corresponding test cases (in fact, the link direction is defined from a test case to a requirement).

Likewise, the test plan can be directly associated with the DNG module containing the requirements via a corresponding link. Since often not all requirements of a module are to be tested using the corresponding test plan, but only a subset (for example, all headings are to be excluded), it is also possible to create the link from the test plan to a view of the respective module. This view then ensures that the artifacts not to be tested are filtered out. The third option is to link the test plan to a DNG collection.



The picture above is simplified because a requirement can actually be linked to more than one test case and a test case can be linked to more than one requirement. In chapter **Add Associations to DNG / EWM** below you will find further information on how to connect an ETM project area with a DNG project area.



- The name of the link type **Validates Requirement Collection** (between a test plan and a module / view) is used here as it appears in the list view in ETM. However, in the view of an opened test plan it is referenced as **Validates Requirement Sets**.
- In DNG **both** links are named **Validated By**.
- The link types and their names are hard-coded in ETM and therefore cannot be changed.

### 4 LINKING BETWEEN ETM AND EWM

#### Using ETM with EWM

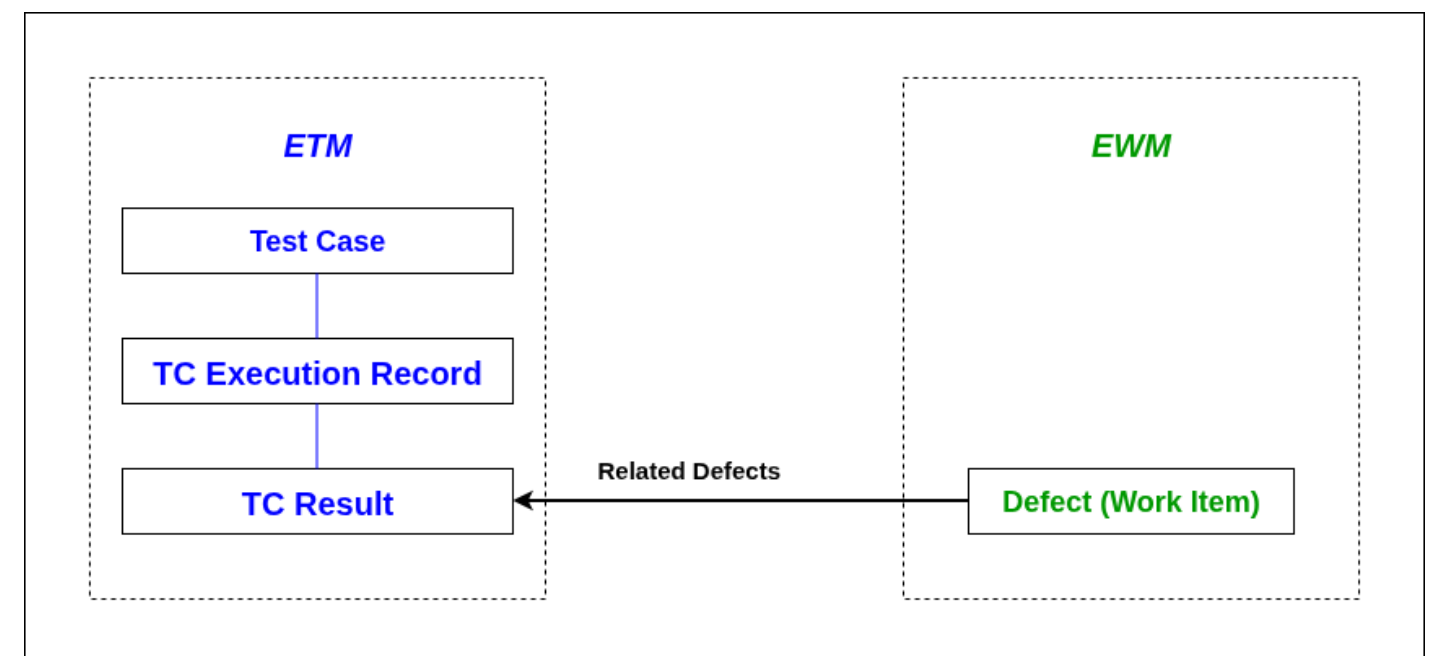
At any time during the test process, the user can submit a defect. For the defect management the tool IBM EWM (Engineering Workflow Management) is typically used.

For more information about EWM, contact your SodiusWillert representative.

#### Linking Test Results to Work Items of type Defect

Using ETM and EWM together offers the advantage of linking a failed test result with a EWM work item of type **Defect** (in fact, the link direction is defined from a work item to a test result). For this purpose, a work item of type Defect can be created directly from ETM within EWM and linked to the test result.

In EWM the Defect work item is then further processed, possibly linked with other work items of a different type. The result could then be, for example, a change request to correct a requirement. But this will not be explained further here, as these process steps are outside the scope of this ETM Quick Start Guide.



The picture above is simplified because a EWM work item can actually be linked to more than one test case result (and other test artifacts) and a test case case result can be linked to more than one work item. In chapter **Add Associations to DNG / EWM** below you will find further information on how to connect an ETM project area with a EWM project area.



- The link type **Related Defects** is hard-coded in ETM and therefore cannot be changed.
- In EWM the corresponding link type is named **Affects Test Case Result**.

## 5 BASIC NAVIGATION

### Log in to ETM

To log in to ETM use the following URL:

**<company-server>/qm**

Replace <company server> by the server's name of your company.

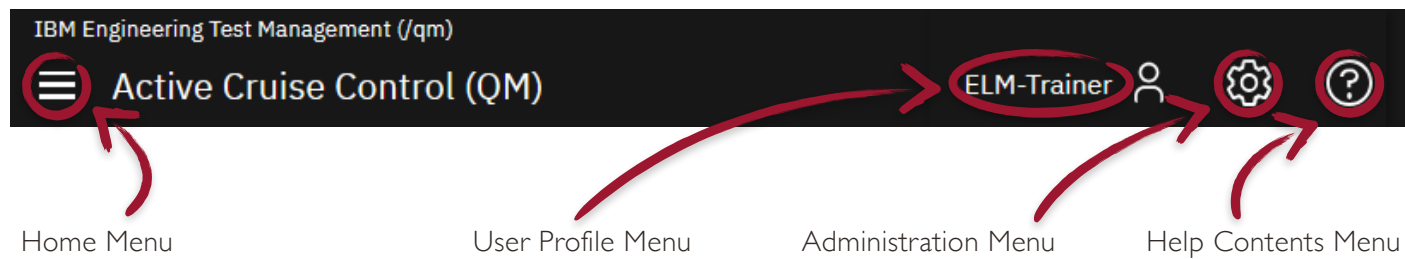
Example:

**elm-traininglab.willert.de/qm**

### Most important Header Line Menus

After the log-in to ETM you have several menus in the header line.

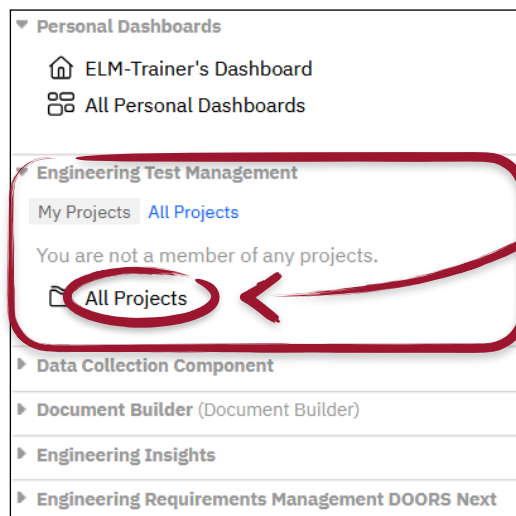
The most important of these are the following.




### Home Menu ☰

Clicking on the hamburger icon opens the **Home Menu**. From there you can access the individual ETM projects and, if available, also the projects in other tools like DNG etc.

To get a list of *all* ETM projects, click on **All Projects** in the **Engineering Test Management** section.



### User Profile Menu

ELM-Trainer 

Clicking on the icon with the logged-in **user name** opens the **User Profile Menu**. For example, you can check here which licenses are assigned to you or change your password, if not centrally administered (menu entry **View My Profile and Licenses**).

- View My Profile and Licenses
- View Other Peoples' Profiles
- Open My Personal Dashboard (default)
- My Globalization Preferences
- My Preferences for Quality Management
- View My Artifact Subscriptions
- Log Out

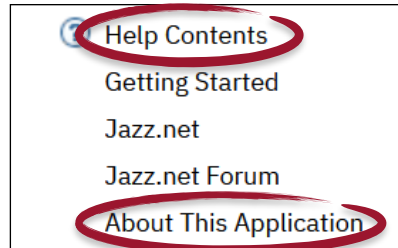
### Administration Menu

Clicking on the gear wheel icon opens the **Administration Menu**. Even if you are not an administrator, it can sometimes be of interest to display various settings for the current project, for example which user has been assigned to which roles.

- Manage Project Properties
- Manage Project Timelines
- Manage Artifact Attachments
- View Trash
- Application Administration
  - Manage This Project Area
  - Manage Application
  - Manage Users
  - Manage Project Areas
  - Manage Templates
  - Manage Reports
- Jazz Team Server Administration
  - Create Lifecycle Project
  - Manage Lifecycle Projects
  - Jazz Team Server Home

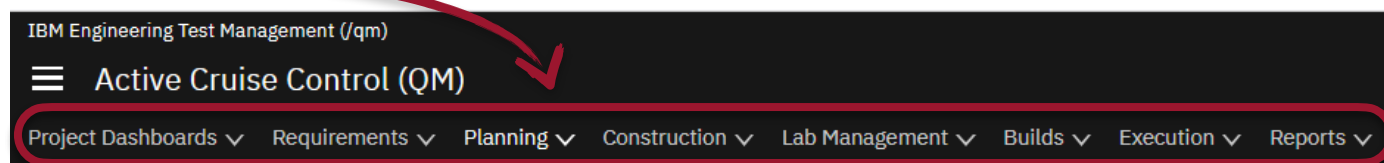
## Help Contents Menu

Clicking on the question mark icon opens the **Help Contents Menu**. From there you can for example open the help pages (menu entry **Help Content**) or check which version of ETM you are using (menu entry **About This Application**).



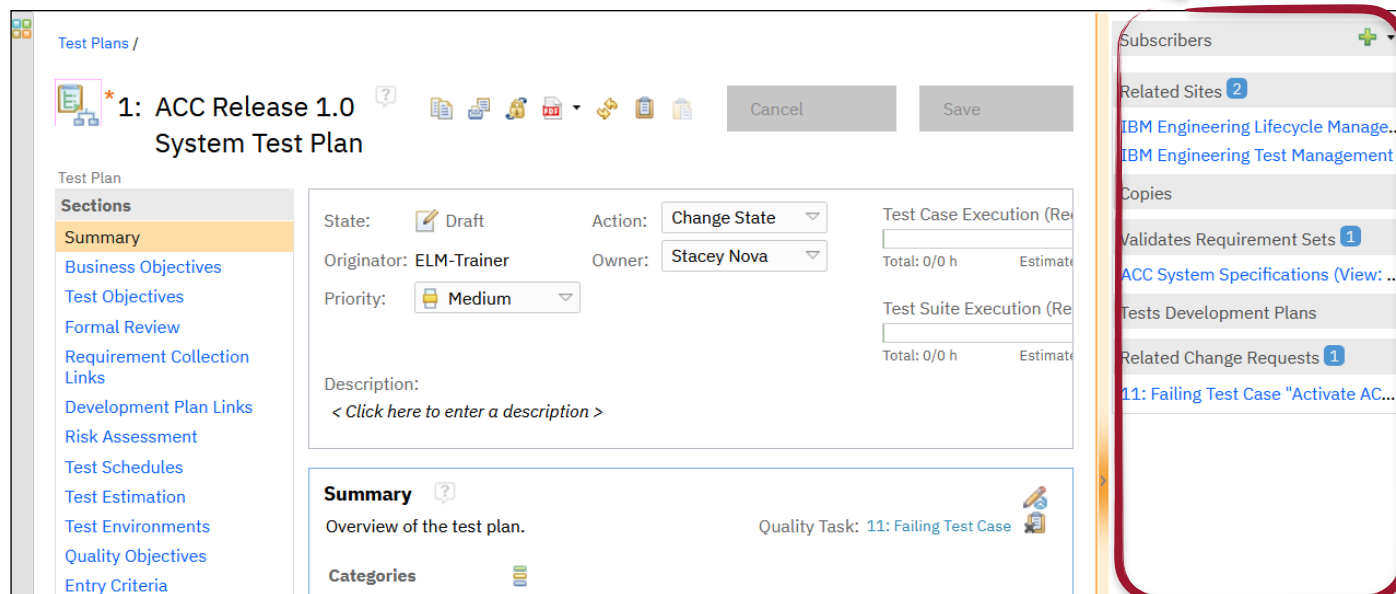
## Main Menus

The **main menus** are located below the header line menus. These are explained in the following chapters.



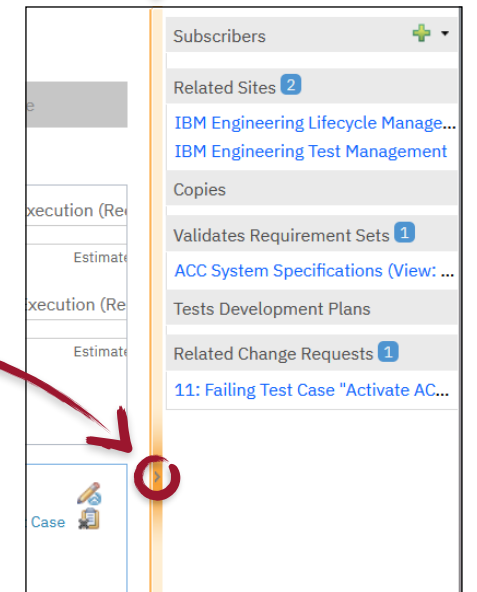
## Right Sidebar

The **right sidebar** is present on most pages and provides access to various functions, including links. It allows users to manage and view related information within the context of the current selected artifact. For example, in the picture below you can see at a glance the linked requirement collections and change requests for a test plan.



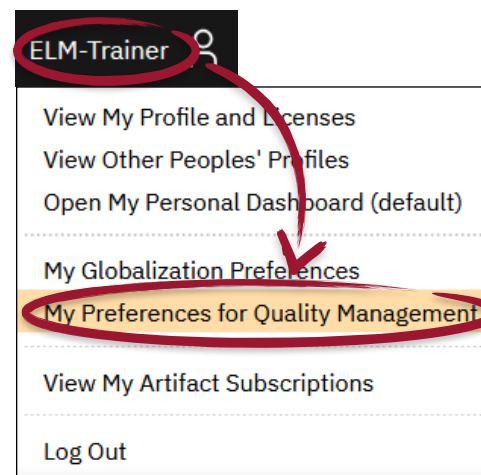
As soon as you hover over the border between the main display and the right sidebar, a yellow **slider** becomes visible. By **dragging** the slider, you can enlarge or reduce the size of the right sidebar.

By clicking on the **right-pointing arrow** in the slider, the sidebar will be **hidden** and becomes visible again after reloading the page (F5).



To **permanently hide** the right sidebar, do the following::

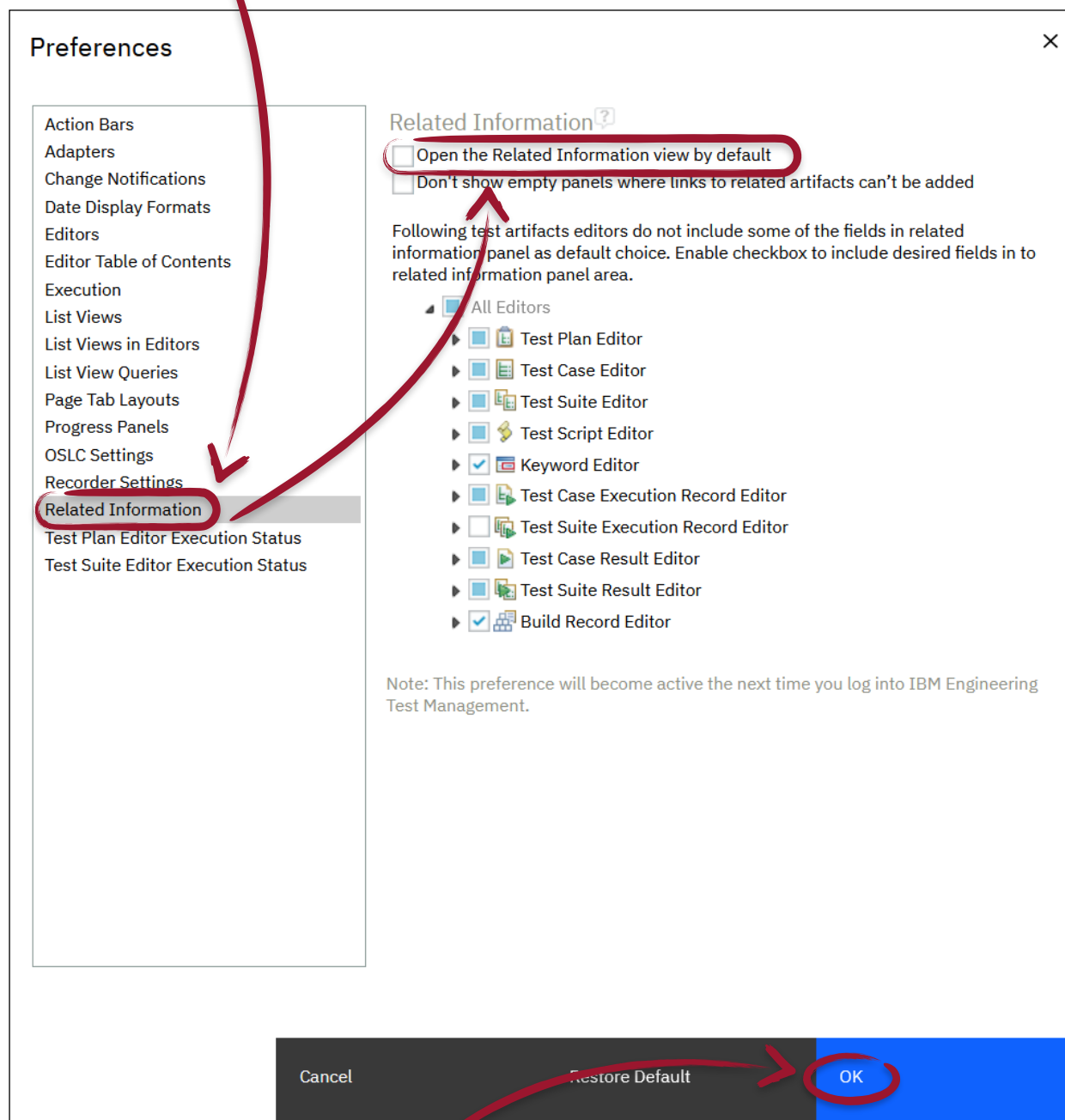
- Open the **User Profile Menu**.
- Select **My Preferences for Quality Management**.



A **Preferences** dialog opens:

On the **left** side, select **Related Information**.

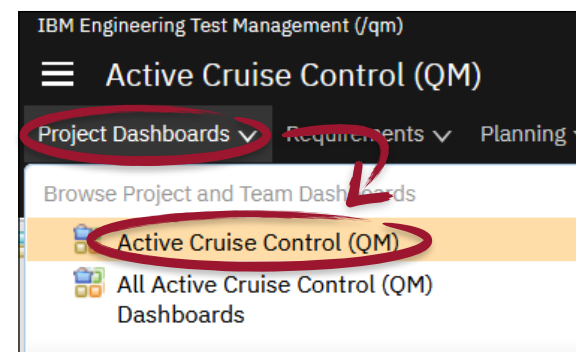
Then, on the **right** side, **disable** the **Open the Related Information view by default** option.



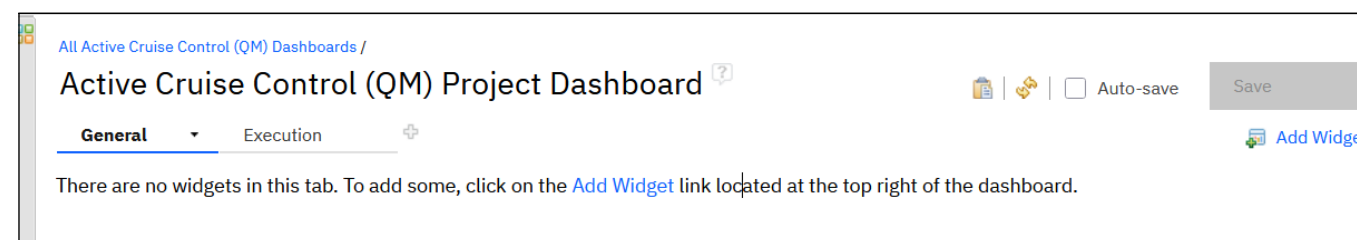
Finally, click **OK** to apply the changes.

## Project Dashboard

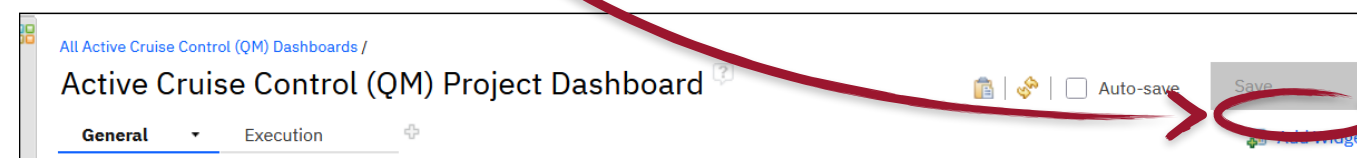
After the first login, the project dashboard for ETM will be opened. Alternatively, you can click on **Project Dashboards** in the header line and then select the entry corresponding to the **project area name**. In the example: **Active Cruise Control (QM)**.



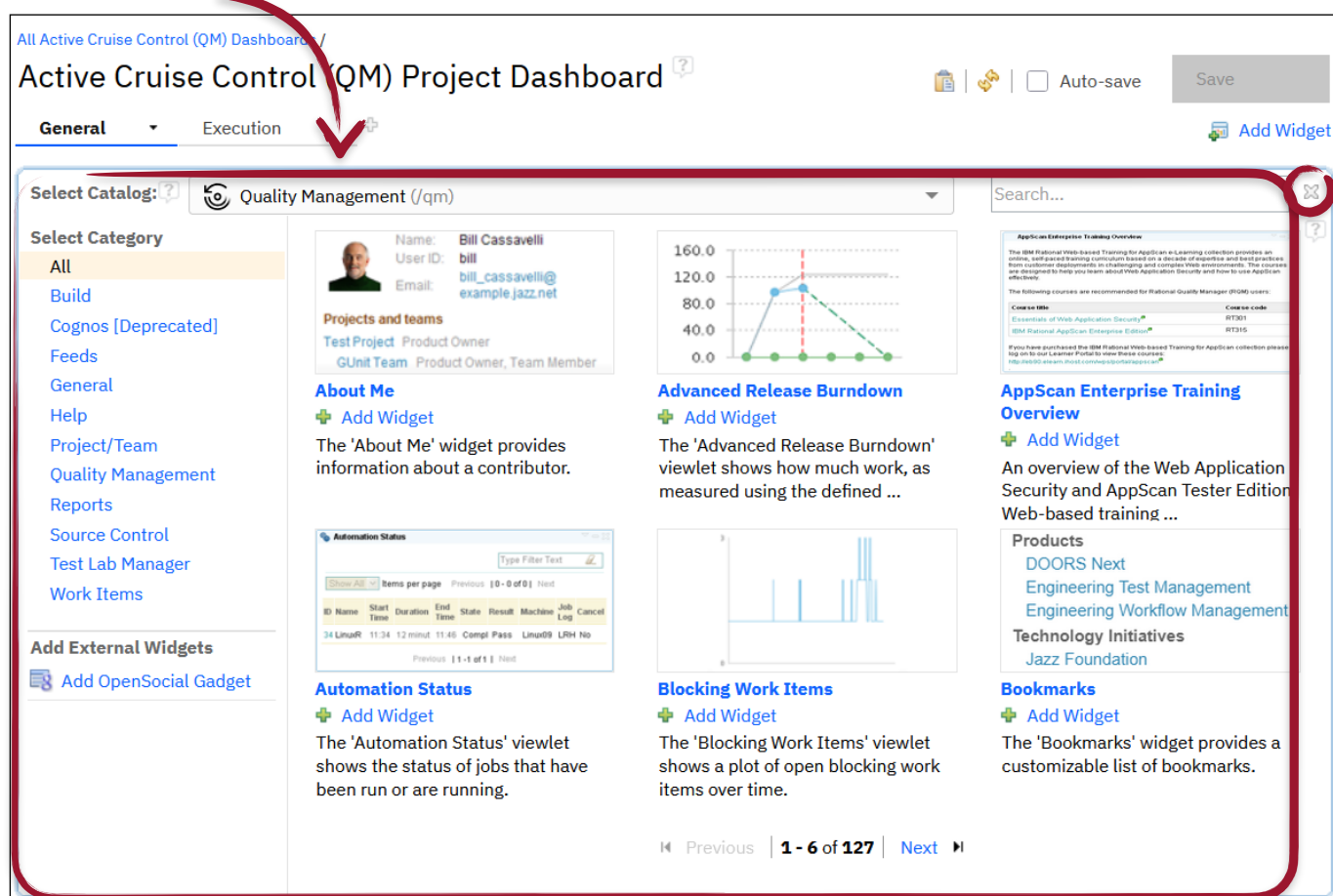
On this page several boxes (called **widgets**) can be added. Each widget displays information about a specific area in ETM or another ELM application (if available).



The following example shows how to add the **My Reviews widget**. This widget indicates where the logged-in user needs to perform **reviews** and **approvals**. To add this widget, click on the **Add Widget** icon.



A **widget catalog** opens. It displays the available predefined widgets in categories depending on the selected application.

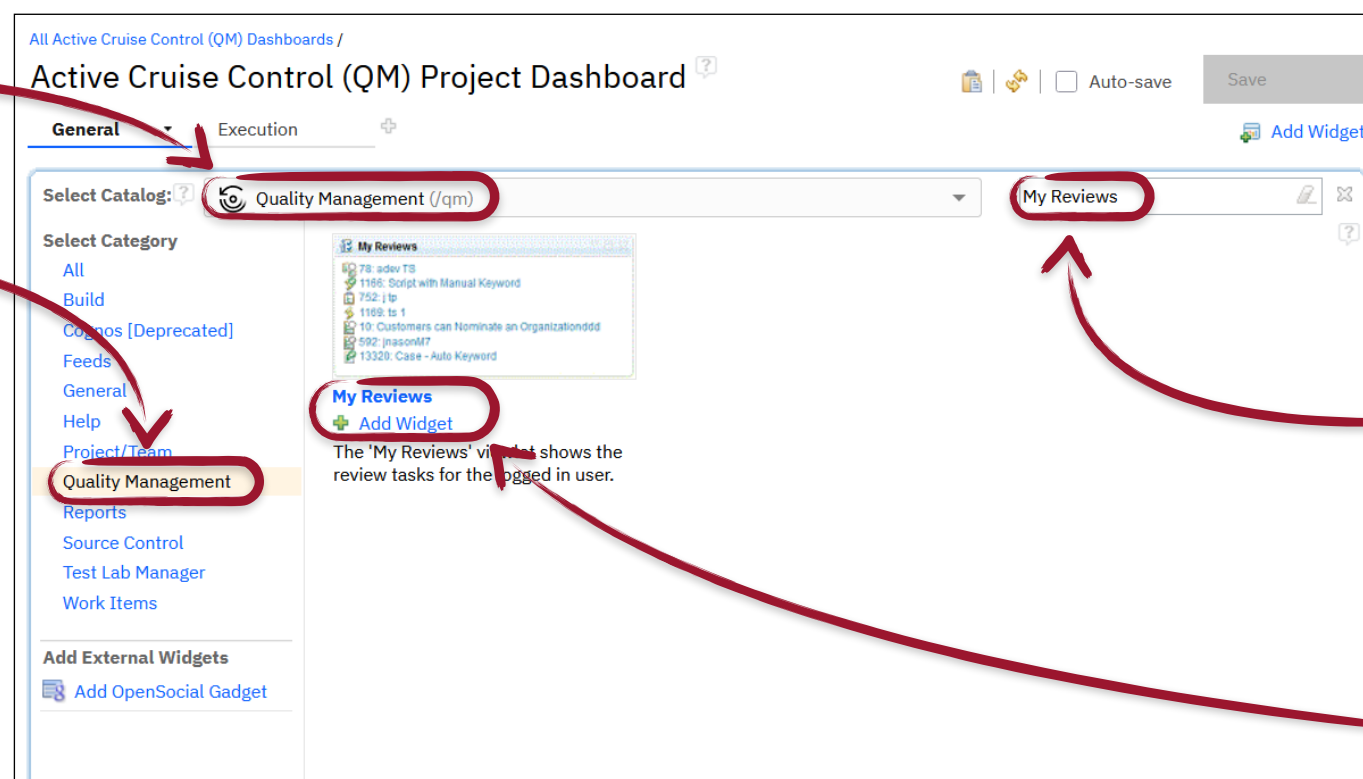


To **close** the catalog after adding a widget and **return** to the dashboard, click the cross icon in the upper right corner of the widget catalog.

To add the **My Reviews** widget widget ...

First, select the application. In the example: **Quality Management** (i.e., the ETM server).

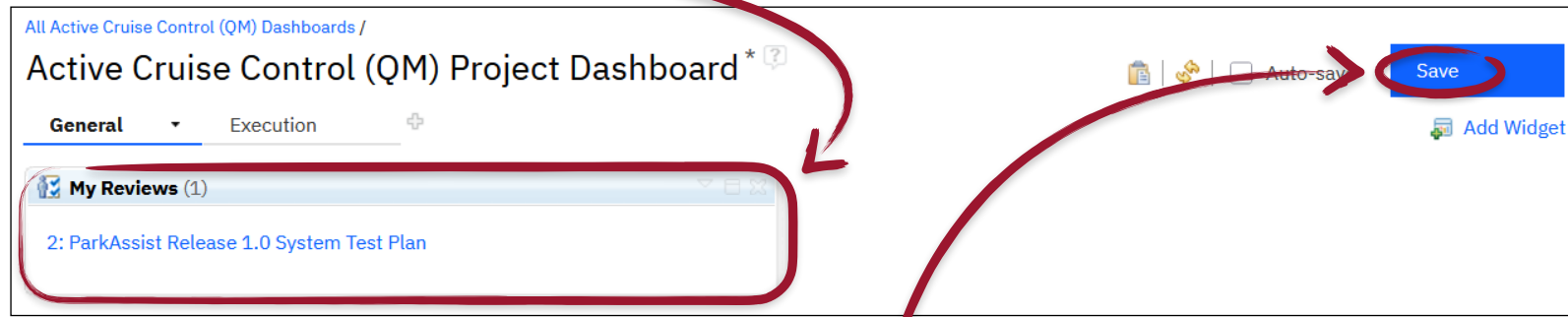
Secondly, select the widget category. In the example: **Quality Management**.



Thirdly, you can search for the widget in the **search field** by entering its name (or part of it). In the example: **My Reviews**. Alternatively, you can browse through the individual pages of the catalog until you find the widget you are looking for.

Finally, the widget is added to the dashboard by clicking on the corresponding **Add Widget** icon.

Back on the *dashboard*, the added widget (*My Reviews*) will be displayed.




To actually **save** the changes on the dashboard, you must click the blue **Save** button in the top right corner.

## 6 LIST VIEWS

### Test Artifacts List Views

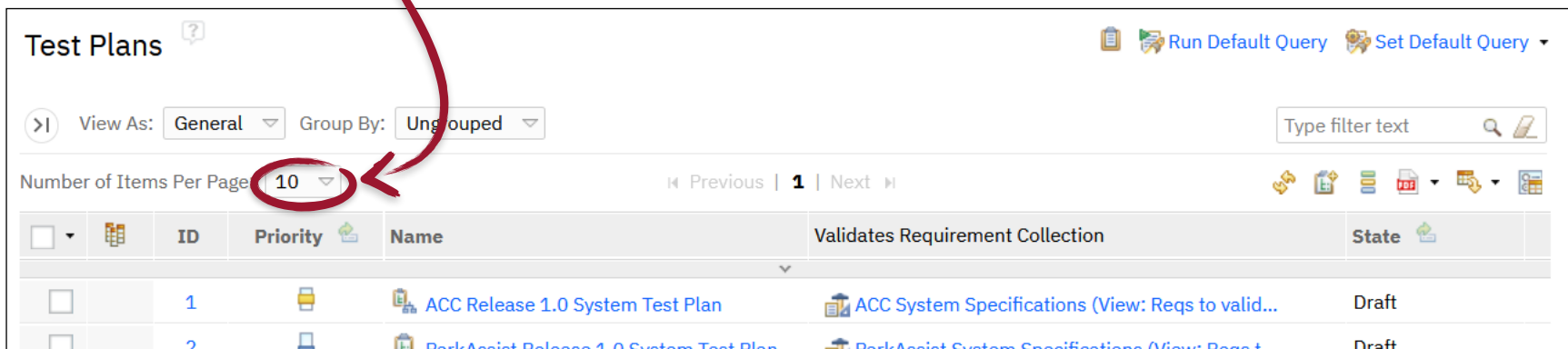
For each of the test artifact there is a **list view**. Individual artifacts can be opened from here, for example.

The artifacts in the list view can be filtered and sorted according to various criteria, and the columns can be arranged, shown or hidden as desired. The filters and the column ordering can be saved in queries. Furthermore, the (filtered) list view can be exported as a PDF or CSV file.

 In the following, the list view of the **test plans** is used as an **example** to explain the different options and operations in list views.

### Number of Items per Page

Using the **Number of Items Per Page** selection box, you can specify whether only **10** artifacts are displayed per page (and then you have to switch to the next page using **Next** if necessary) or all (**Show All**).

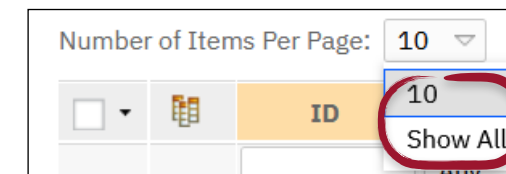


Test Plans

View As: General Group By: Ungrouped

Number of Items Per Page: 10

| ID | Priority | Name                                    | Validates Requirement Collection                         | State |
|----|----------|-----------------------------------------|----------------------------------------------------------|-------|
| 1  |          | ACC Release 1.0 System Test Plan        | ACC System Specifications (View: Reqs to valid...        | Draft |
| 2  |          | ParkAssist Release 1.0 System Test Plan | ParkAssist System Specifications (View: Reqs to valid... | Draft |



Number of Items Per Page: 10

10

Show All

### Refresh the List View

Clicking on the **Refresh** icon updates the list view.

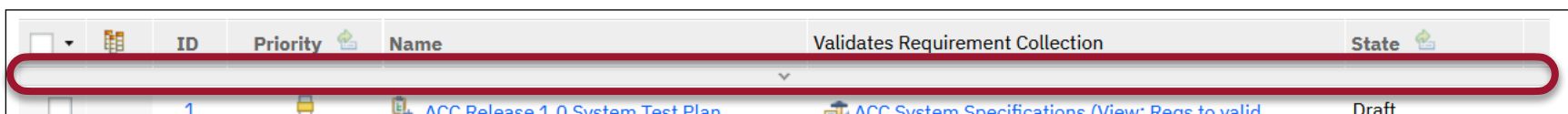


Number of Items Per Page: 10

| ID | Priority | Name                             | Validates Requirement Collection                  | State |
|----|----------|----------------------------------|---------------------------------------------------|-------|
| 1  |          | ACC Release 1.0 System Test Plan | ACC System Specifications (View: Reqs to valid... | Draft |

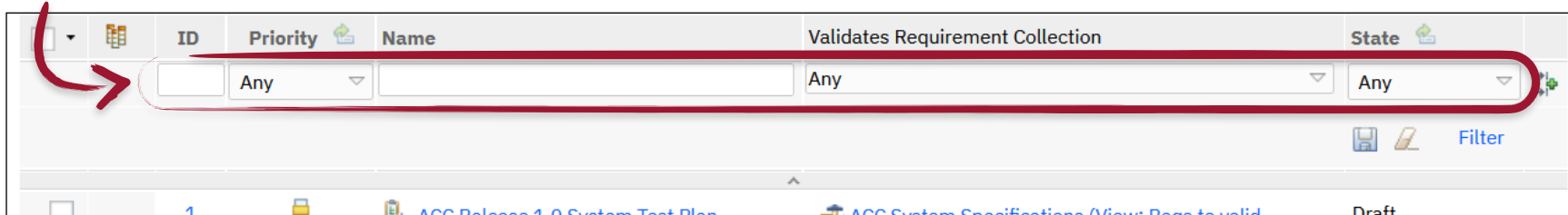
### Inline Filter

To limit the number of artifacts displayed, you can use the **inline filter**. To open it, click the **horizontal divider**.



| ID | Priority | Name                             | Validates Requirement Collection                  | State |
|----|----------|----------------------------------|---------------------------------------------------|-------|
| 1  |          | ACC Release 1.0 System Test Plan | ACC System Specifications (View: Reqs to valid... | Draft |

**Filters** for all columns will then appear:



| ID | Priority | Name                             | Validates Requirement Collection                  | State |
|----|----------|----------------------------------|---------------------------------------------------|-------|
|    | Any      |                                  | Any                                               | Any   |
| 1  |          | ACC Release 1.0 System Test Plan | ACC System Specifications (View: Reqs to valid... | Draft |

Filter

A filter criterion could be, for example, the **State** of the artifact.

In this example, **Draft** is selected as **State**.

Number of Items Per Page: 10

Previous | 1 | Next

| ID | Priority | Name | State |
|----|----------|------|-------|
|    | Any      |      | Any   |

State dropdown menu:

- All
- Draft** (selected)
- Under Review
- Approved
- Retired

After one or more inline filters have been set, you must click on **Filter** to apply them.

Test Plans

View As: General | Group By: Ungrouped

Number of Items Per Page: 10

Previous | 1 | Next

| ID | Priority | Name | State |
|----|----------|------|-------|
|    | Any      |      | Any   |

Filter button: Filter

Showing 1-2 of 2 items

Previous | 1 | Next

- 1 ACC Release 1.0 System Test Plan ACC System Specifications (View: Reqs to valid... Draft
- 2 ParkAssist Release 1.0 System Test Plan ParkAssist System Specifications (View: Reqs t... Draft

As a result, only those artifacts with the **State** is **Draft** are now displayed in the list.

After the filters have been applied, the **Clear all filters** icon (eraser) will also be displayed as **pressed**.

| ID | Priority | Name | State |
|----|----------|------|-------|
|    | Any      |      | Any   |

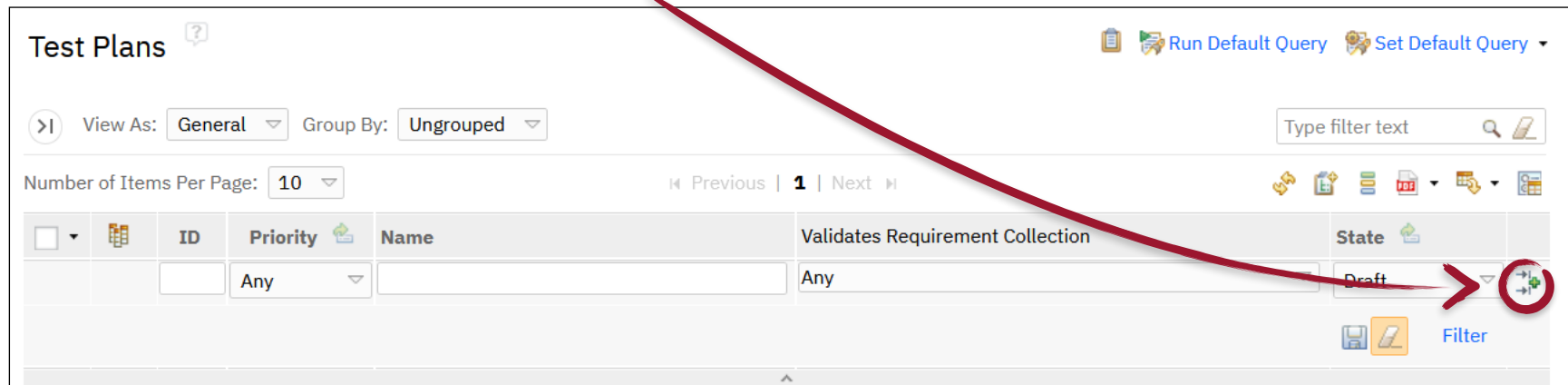
Filter button: Filter

Clear all filters icon (eraser)

To **reset** the filtering, click this **Clear all filters** icon (which will delete all filters) and then click **Filter** again to apply the change.

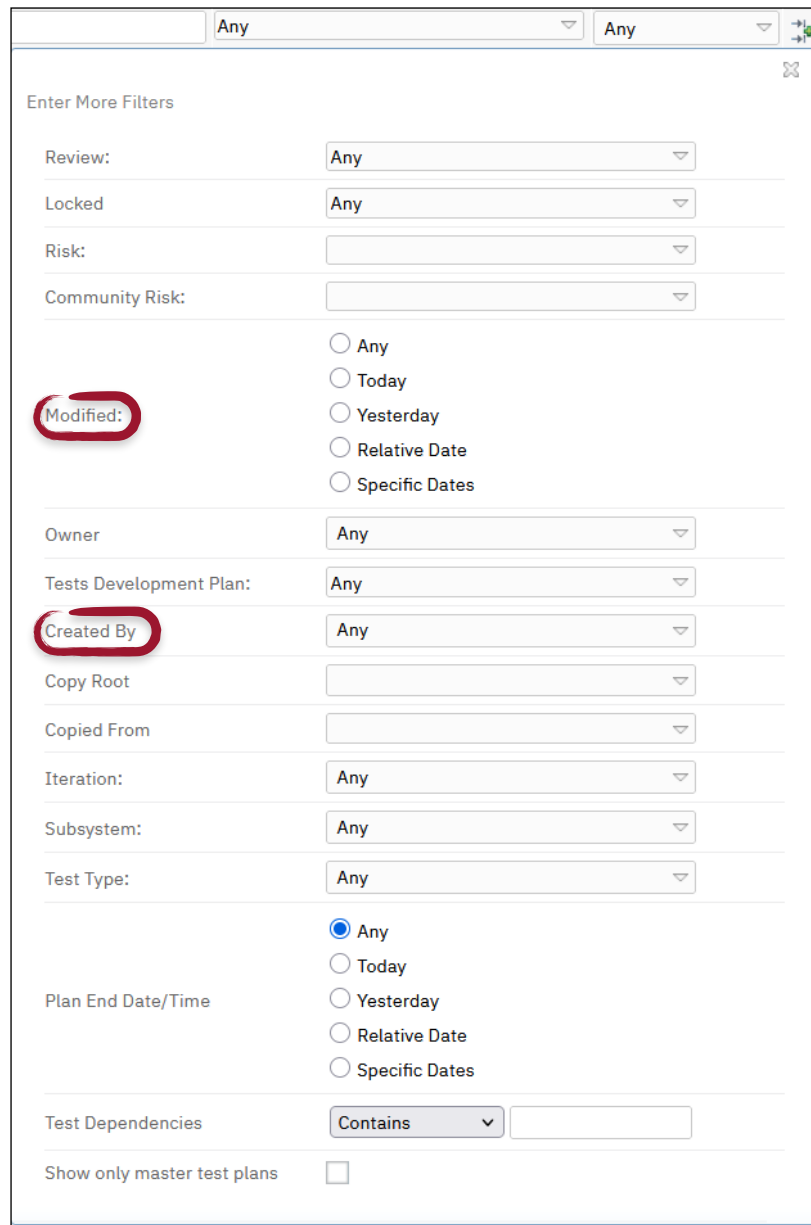
## More Filters

Within the inline filter section, you can use the **More Filters** icon to display a dialog box for selecting **additional** filters.



The screenshot shows the 'Test Plans' interface. At the top, there are buttons for 'Run Default Query' and 'Set Default Query'. Below these, there are dropdowns for 'View As: General' and 'Group By: Ungrouped'. A search bar labeled 'Type filter text' is also present. The main table has columns for 'ID', 'Priority', 'Name', 'Validates Requirement Collection', and 'State'. The first row shows 'Any' for Priority and 'Any' for State. A red arrow points from the 'More Filters' icon (a green circle with a plus sign) to the 'Filter' button at the bottom right of the table.

For example, you can filter by the last modified date (**Modified**) or by the user who created the test artifact (**Created By**), etc.



The 'Enter More Filters' dialog box is shown. It contains several filter categories with dropdown menus and radio buttons. The 'Modified' and 'Created By' filters are circled in red. The 'Modified' filter has radio buttons for 'Any', 'Today', 'Yesterday', 'Relative Date', and 'Specific Dates'. The 'Created By' filter has a dropdown menu set to 'Any'. Other filters include 'Review', 'Locked', 'Risk', 'Community Risk', 'Owner', 'Tests Development Plan', 'Copy Root', 'Copied From', 'Iteration', 'Subsystem', 'Test Type', 'Plan End Date/Time', 'Test Dependencies', and 'Show only master test plans'.

## Change Columns to display

The available columns in the list view can be hidden or displayed. Furthermore, the column order can be changed and various options can be set, such as whether the content of a column is trimmed if it is larger than its width or whether it wraps to the next line. To do this click on the **change column display settings** icon.



A **Change Columns Display Settings** dialog opens:

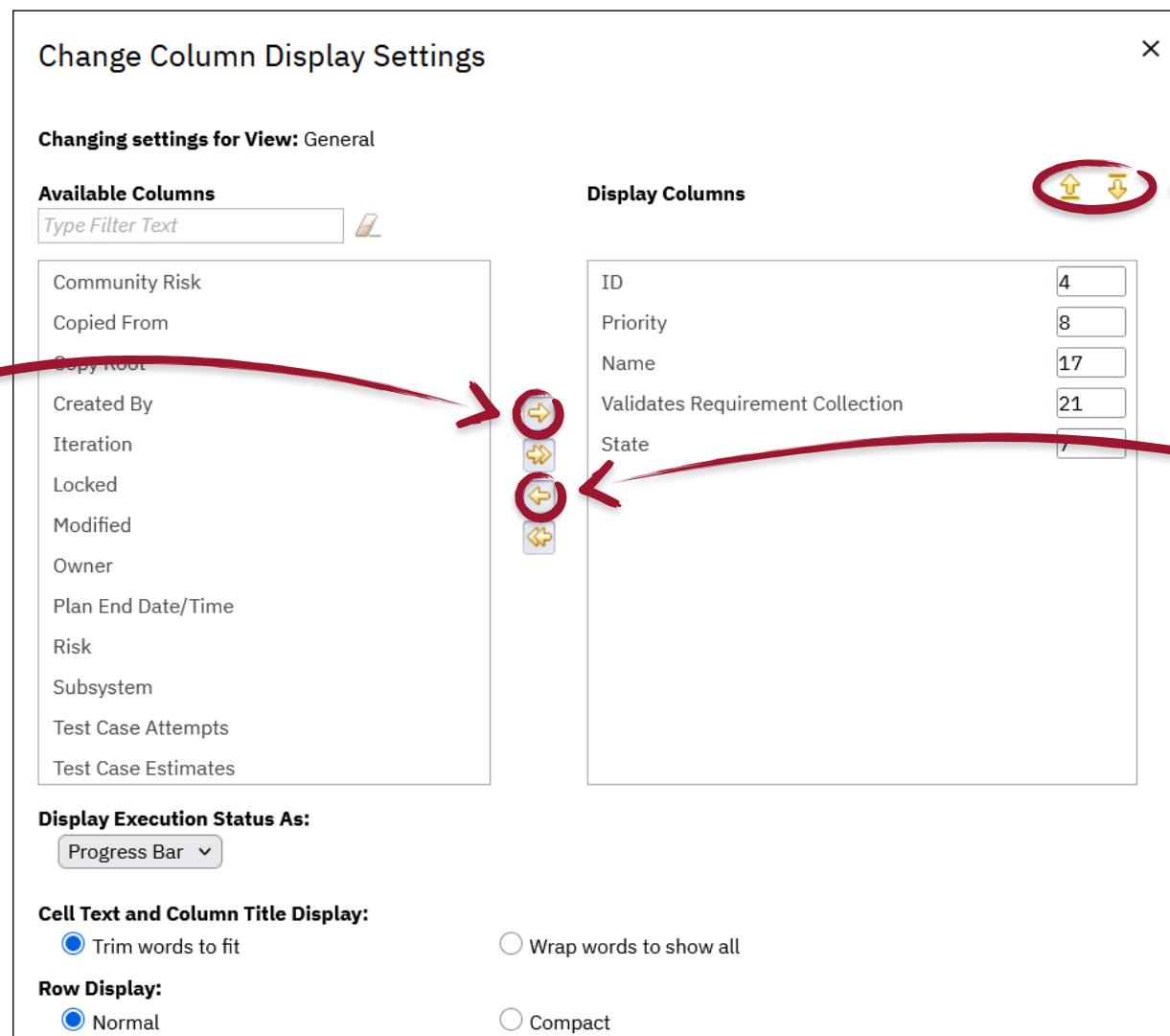
All currently **hidden** (i.e. not used) columns are listed on the **left** side.

All currently **visible** (i.e. used) columns are listed on the **right** side.



Remember: The examples show the appearance for **test plans** and are therefore **different** for other test artifacts (such as test cases, test scripts, etc.)!

To move a column from the left to the right side (i.e., to **make it visible**), select it and then click on the **arrow pointing right**.



To change the **order** of the columns, select a column on the **right side** and then click on the **up** or **down pointing arrow** to move it accordingly.

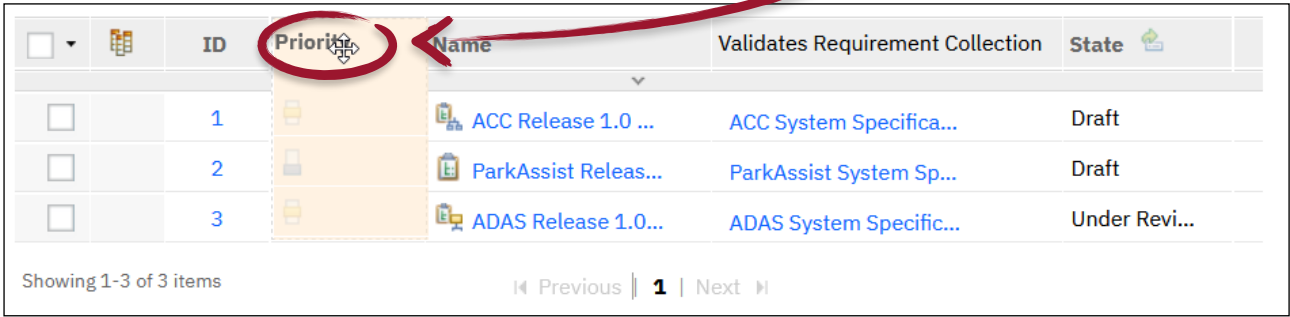
To move a column from the right to the left side (i.e., to **make it hidden**), select it and then click on the **arrow pointing left**.

After making changes to the column settings, click the **OK** button at the bottom of the dialog to actually save the changes.

### Reorder Columns by drag and drop

Another very convenient way to reorder the columns is to use *drag and drop*. This is done as follows (in the example, the *Priority* column is moved one position to the left so that it is now in front of the *ID* column):

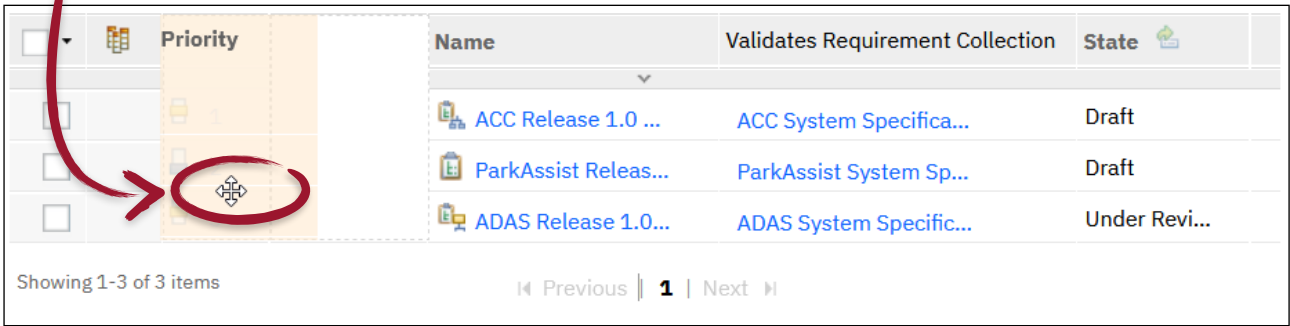
- Move the mouse pointer over the column you want to move (in the example column *Priority*).
- Press and hold the mouse button. The mouse pointer changes to a *cross*, and the selected column is only dimly displayed.



|                          | ID | Priority | Name                 | Validates Requirement Collection | State         |
|--------------------------|----|----------|----------------------|----------------------------------|---------------|
| <input type="checkbox"/> | 1  |          | ACC Release 1.0 ...  | ACC System Specifica...          | Draft         |
| <input type="checkbox"/> | 2  |          | ParkAssist Releas... | ParkAssist System Sp...          | Draft         |
| <input type="checkbox"/> | 3  |          | ADAS Release 1.0...  | ADAS System Specific...          | Under Revi... |

Showing 1-3 of 3 items    Previous | 1 | Next

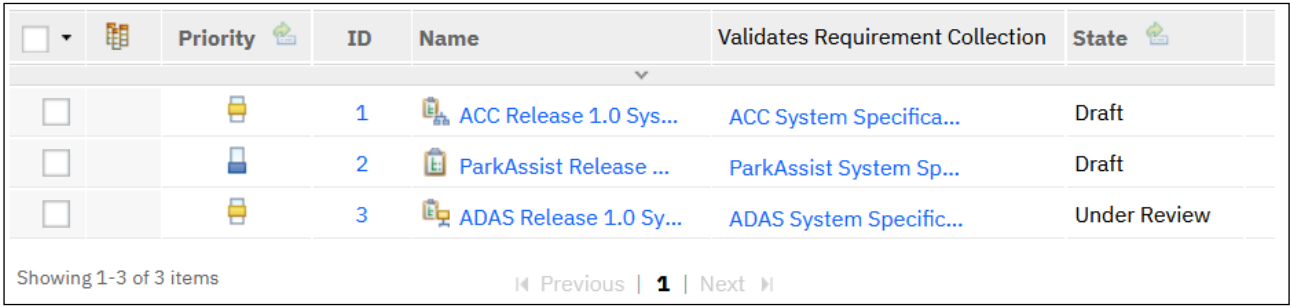
- *Drag* the mouse pointer to the position you want to move the selected column *before* (in the example column *ID*).



|                          | Priority | ID | Name                 | Validates Requirement Collection | State         |
|--------------------------|----------|----|----------------------|----------------------------------|---------------|
| <input type="checkbox"/> |          |    | ACC Release 1.0 ...  | ACC System Specifica...          | Draft         |
| <input type="checkbox"/> |          |    | ParkAssist Releas... | ParkAssist System Sp...          | Draft         |
| <input type="checkbox"/> |          |    | ADAS Release 1.0...  | ADAS System Specific...          | Under Revi... |

Showing 1-3 of 3 items    Previous | 1 | Next

- *Drop* the selected column that position by releasing the mouse button.



|                          | Priority | ID | Name                   | Validates Requirement Collection | State        |
|--------------------------|----------|----|------------------------|----------------------------------|--------------|
| <input type="checkbox"/> |          | 1  | ACC Release 1.0 Sys... | ACC System Specifica...          | Draft        |
| <input type="checkbox"/> |          | 2  | ParkAssist Release ... | ParkAssist System Sp...          | Draft        |
| <input type="checkbox"/> |          | 3  | ADAS Release 1.0 Sy... | ADAS System Specific...          | Under Review |

Showing 1-3 of 3 items    Previous | 1 | Next

## Sort the List by Column

The list can be **sorted** by one or more columns. To do this,

- Click on the corresponding **column header** (in the example column **Priority**).
- Select the sort order: **Ascending**, **Descending** or **No sort**.  
In the example: **Ascending**.



Sorting is only possible for columns with **bold** column headers, i.e., **not** for links (like **Validates Requirement Collection** etc.), for example.

|                          | ID | <b>Priority</b> | Name                                    | Validates Requirement Collection   | State        |
|--------------------------|----|-----------------|-----------------------------------------|------------------------------------|--------------|
| <input type="checkbox"/> | 1  | 1               | ACC Release 1.1 System Test Plan        | ACC System Specifications (View... | Draft        |
| <input type="checkbox"/> | 2  | 2               | ParkAssist Release 1.0 System Test Plan | ParkAssist System Specification... | Draft        |
| <input type="checkbox"/> | 3  | 3               | ADAS Release 1.0 System Test Plan       | ADAS System Specifications (Vie... | Under Review |

The list is now sorted accordingly. A small **upward**-pointing arrow in the column header indicates that the list is sorted in **ascending** order by that column. In addition, the number next to it (in the example: **1**) indicates that the sorting was done first by this column.

|                          | ID | <b>Priority</b> ↑1 | Name                                    | Validates Requirement Collection   | State        |
|--------------------------|----|--------------------|-----------------------------------------|------------------------------------|--------------|
| <input type="checkbox"/> | 2  | 2                  | ParkAssist Release 1.0 System Test Plan | ParkAssist System Specification... | Draft        |
| <input type="checkbox"/> | 1  | 1                  | ACC Release 1.1 System Test Plan        | ACC System Specifications (View... | Draft        |
| <input type="checkbox"/> | 3  | 3                  | ADAS Release 1.0 System Test Plan       | ADAS System Specifications (Vie... | Under Review |

Additionally, you can sort by additional columns. Then, rows of equal **Priority** according to the first sorting criterion are sorted according to this second criterion. In the example, rows with the same **Priority** should be sorted in **descending** order by **ID**.

|                          | <b>ID</b> | <b>Priority</b> ↑1 | Name                                    | Validates Requirement Collection   | State        |
|--------------------------|-----------|--------------------|-----------------------------------------|------------------------------------|--------------|
| <input type="checkbox"/> | 2         | 2                  | ParkAssist Release 1.0 System Test Plan | ParkAssist System Specification... | Draft        |
| <input type="checkbox"/> | 1         | 1                  | ACC Release 1.1 System Test Plan        | ACC System Specifications (View... | Draft        |
| <input type="checkbox"/> | 3         | 3                  | ADAS Release 1.0 System Test Plan       | ADAS System Specifications (Vie... | Under Review |

The result then looks like this.

A small **downward**-pointing arrow in the column heading indicates that the list is sorted by this column in **descending** order and the number next to it (in the example: **2**) indicates that the sorting was performed by this column as a second criterion.

|                          | <b>ID</b> ↓2 | <b>Priority</b> ↑1 | Name                                    | Validates Requirement Collection   | State        |
|--------------------------|--------------|--------------------|-----------------------------------------|------------------------------------|--------------|
| <input type="checkbox"/> | 2            | 2                  | ParkAssist Release 1.0 System Test Plan | ParkAssist System Specification... | Draft        |
| <input type="checkbox"/> | 3            | 3                  | ADAS Release 1.0 System Test Plan       | ADAS System Specifications (Vie... | Under Review |
| <input type="checkbox"/> | 1            | 1                  | ACC Release 1.1 System Test Plan        | ACC System Specifications (View... | Draft        |

## Queries

After filters have been set and columns defined, the setting can be saved as a *query*. Click on the **Save** icon to save the current settings as a query.



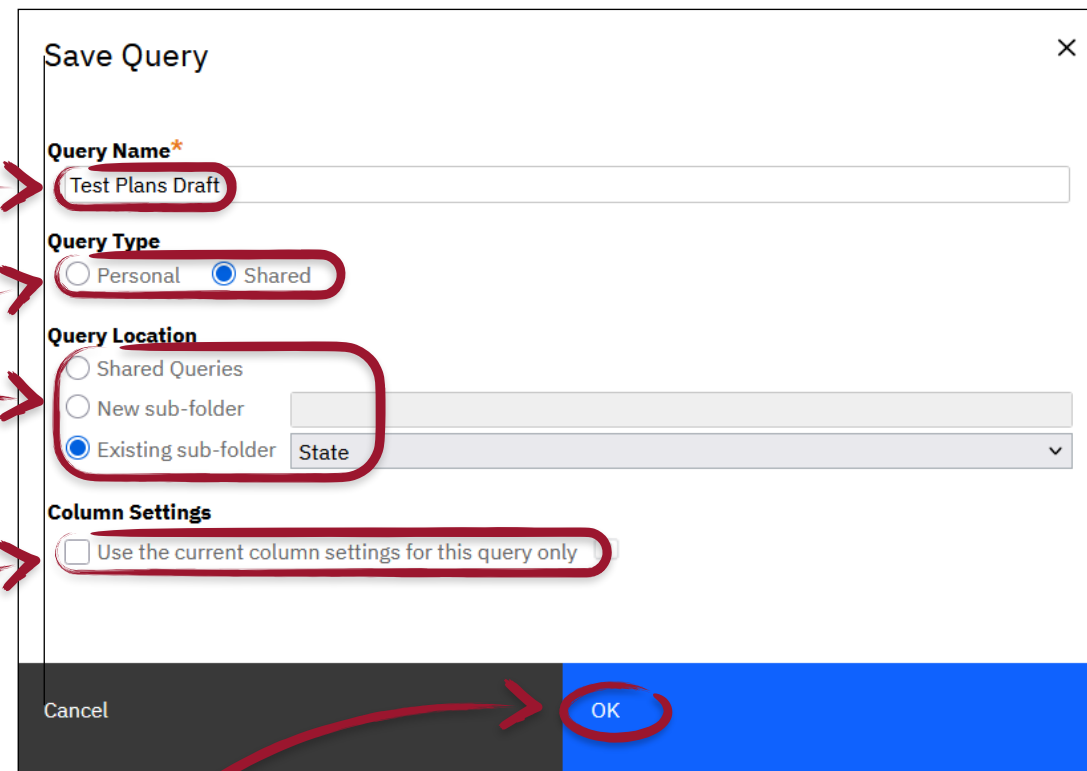
A **Save Query** dialog opens:

In field **Query Name** enter the *name* of the new query (in the example: *Test Plans Draft*).

In field **Query Type** select either *Personal* (i.e. the query is only visible to yourself and not to other users) or *Shared* (i.e. the query is visible to all users).

The field **Query Location** specifies the *location* where the query is *saved*. It can be either directly as the topmost entry (*Shared Queries*) or within a folder that is either newly created (*New sub-folder*) or already exists (*Existing sub-folder*). In this example, the new query should be saved in the existing *State* folder.

Enable option *Use the current column settings for this query only* to retain the current column layout for the query that you are creating.



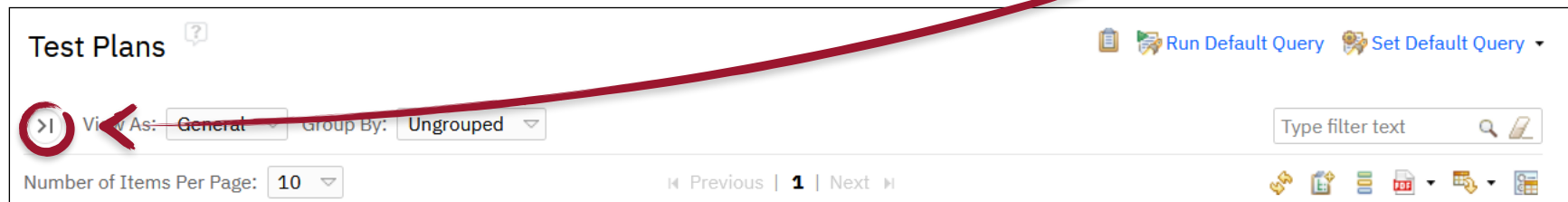
The 'Save Query' dialog box is shown with the following fields and options:

- Query Name\***: A text input field containing 'Test Plans Draft'.
- Query Type**: Two radio buttons, 'Personal' and 'Shared'. 'Shared' is selected.
- Query Location**: Three radio buttons, 'Shared Queries', 'New sub-folder', and 'Existing sub-folder'. 'Existing sub-folder' is selected. To the right of 'Existing sub-folder' is a dropdown menu currently showing 'State'.
- Column Settings**: A checkbox labeled 'Use the current column settings for this query only'.

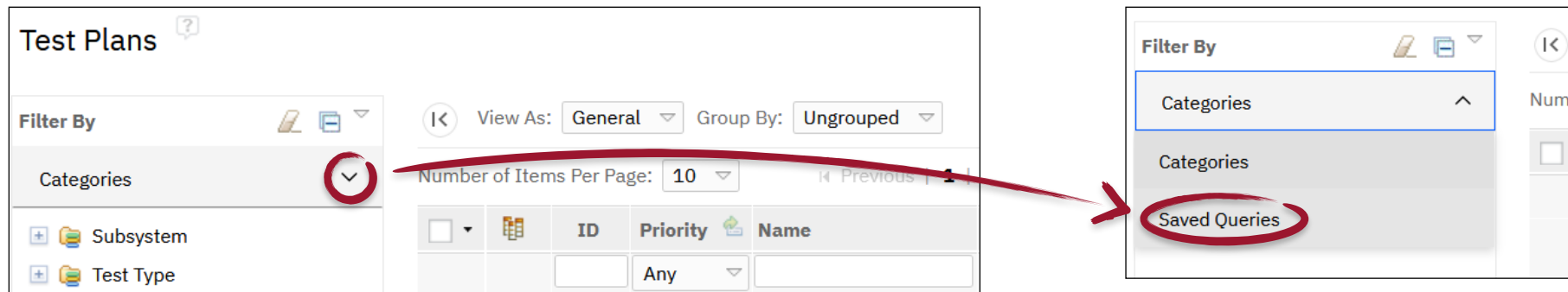
At the bottom of the dialog, there are two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted in blue and circled in red.

Click on **OK** to actually create the query.

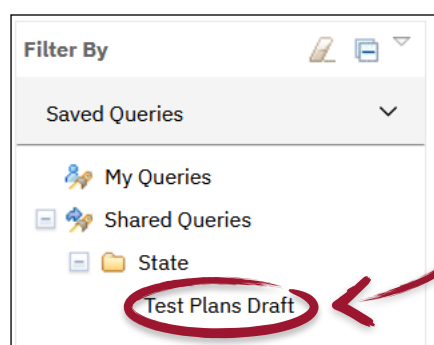
The filters are displayed in the **Filters** sidebar on the left side. To make this sidebar visible, click on **Show / Hide Filters**.



In the Filter sidebar, **Saved Queries** may need to be selected below **Filter by** (instead of **Categories** as shown in the picture below).

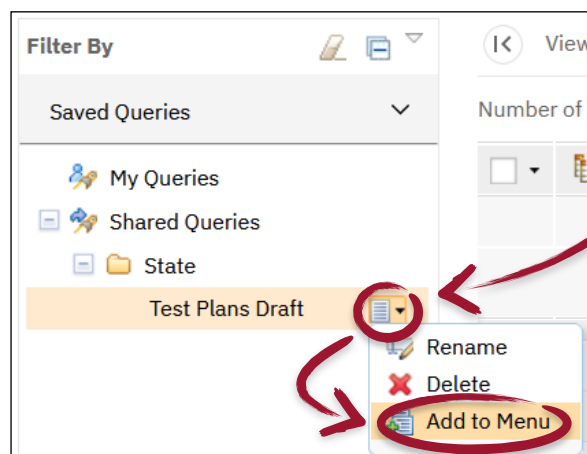


Now the saved queries are visible in two sections **My Queries** (i.e. personal queries) and **Shared Queries**. The query from the example (**Test Plans Draft**) was saved under **Shared Queries** in the sub-folder **State**.

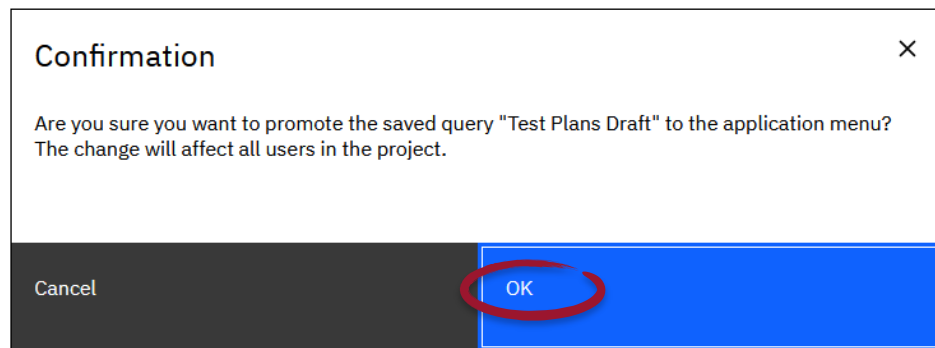


It is possible to set a query as an **entry** in the **main menu**. To do this,

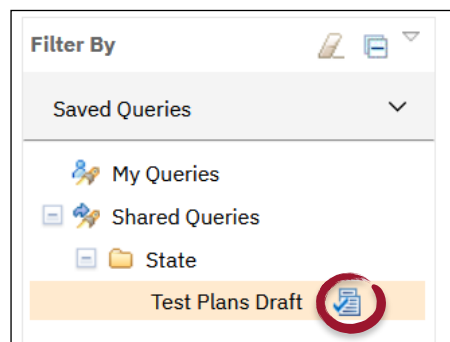
- Select the query in the filter sidebar, which will display a **context menu icon**.
- Then click on this icon and select **Add to Menu**.



A *confirmation* dialog will appear where you click *OK*.



The filter is now displayed with a *check mark* icon in the filter sidebar.

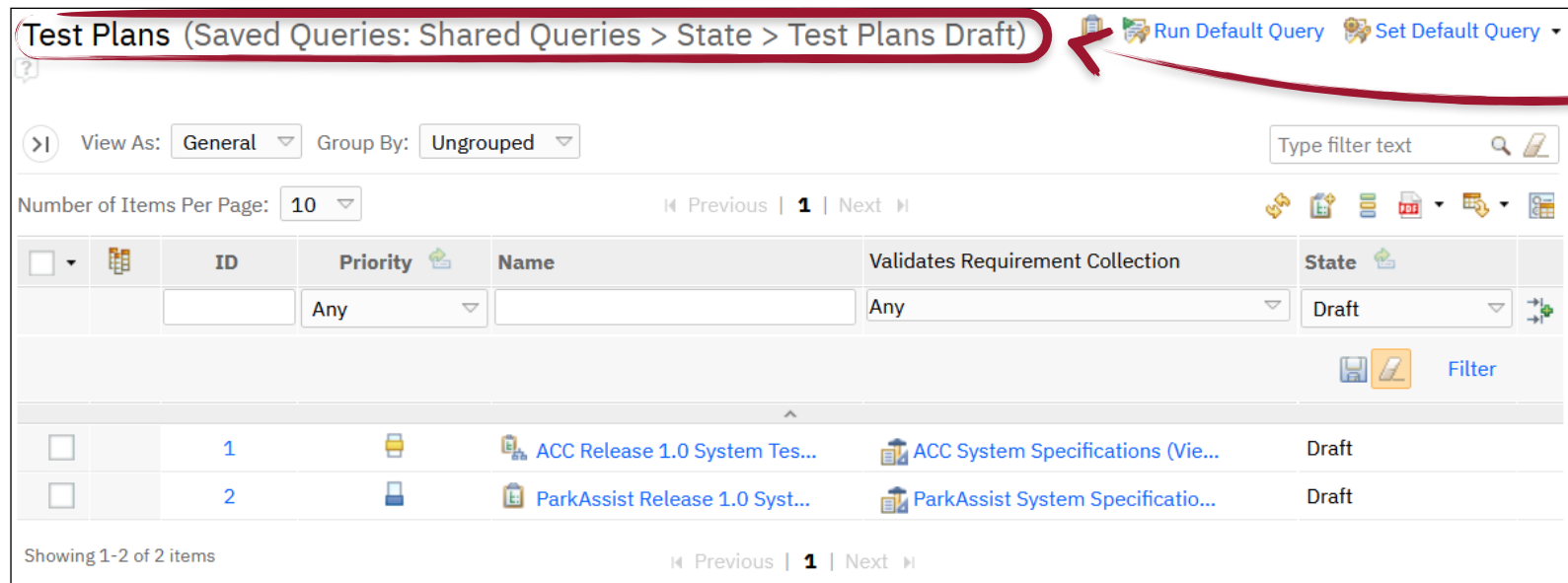


Additionally, the query is now visible as a *main menu* entry.



Clicking on the entry in the main menu opens the list view *and* runs the query.

You can see in the *top left* that the list view is the result of a query, as *Saved Queries* appears in parentheses, followed by the query type, the folder path and the name. In the example: *Saved Queries: Shared Queries > State > Test Plan Draft*.



Test Plans (Saved Queries: Shared Queries > State > Test Plans Draft)

View As: General Group By: Ungrouped

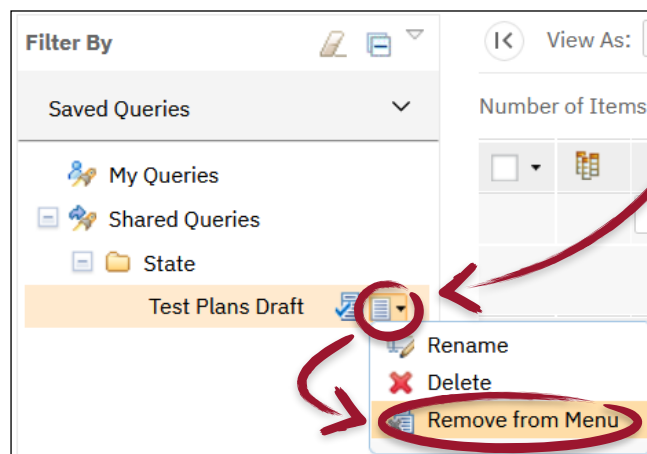
Number of Items Per Page: 10

| ID | Priority | Name                           | Validates Requirement Collection  | State |
|----|----------|--------------------------------|-----------------------------------|-------|
| 1  | Any      | ACC Release 1.0 System Tes...  | ACC System Specifications (Vie... | Draft |
| 2  | Any      | ParkAssist Release 1.0 Syst... | ParkAssist System Specificatio... | Draft |

Showing 1-2 of 2 items

To *remove* the query entry from the main menu

- Select the query in the filter sidebar, which will display a *context menu icon*.
- Then click on this icon and select *Remove from Menu*.



Filter By

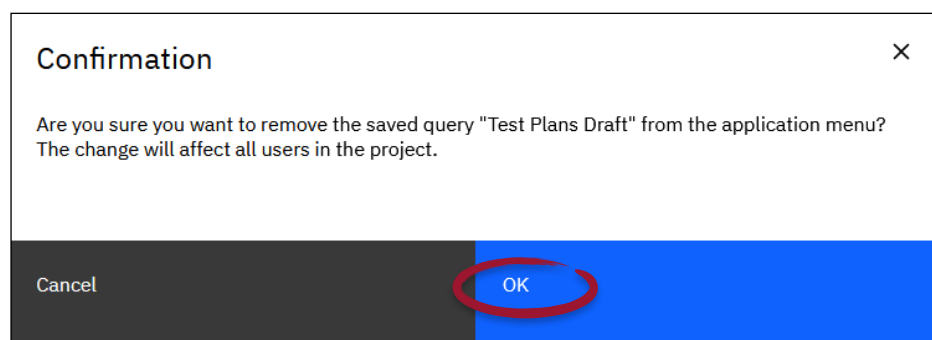
Saved Queries

- My Queries
- Shared Queries
- State
- Test Plans Draft

Context Menu:

- Rename
- Delete
- Remove from Menu

A *confirmation* dialog will appear where you click *OK*.



Confirmation

Are you sure you want to remove the saved query "Test Plans Draft" from the application menu?  
The change will affect all users in the project.

Cancel OK

It is also possible to define a **default query** for a list view. This query will then be automatically run each time the corresponding list view is opened. The default query can then be run by clicking on **Run Default Query** on the top.

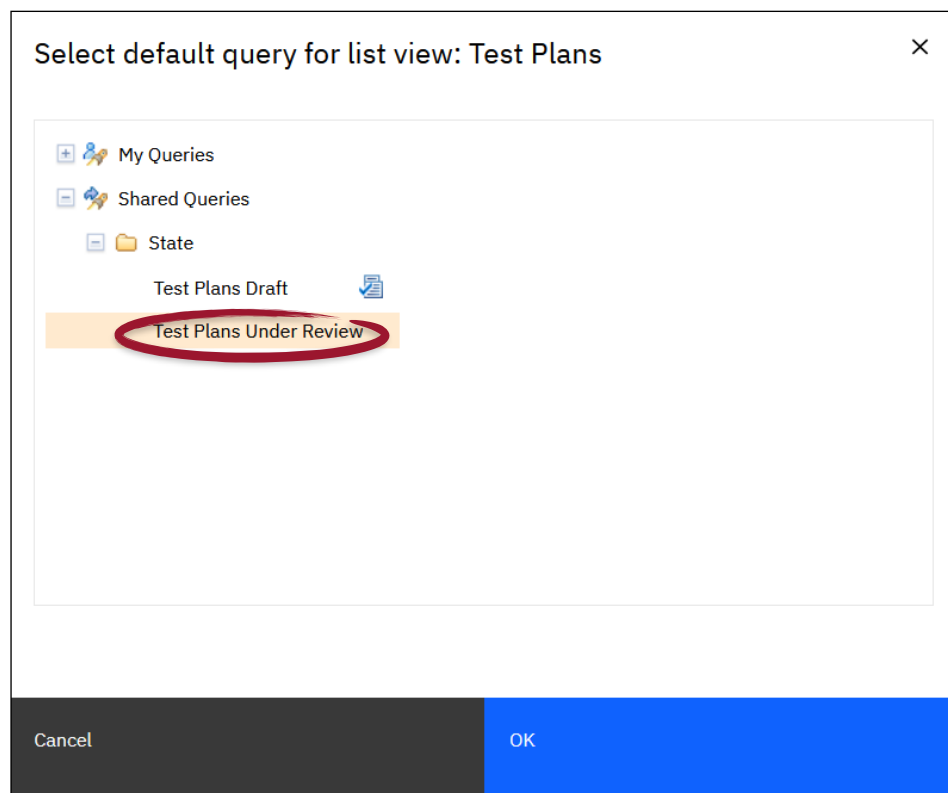


To define the default query:

- Click on **Set Default Query** in the top right corner, which will display a **context menu**.
- Select the entry **Select**.



A **Select default query for list view** dialog opens in which the desired query is selected (in the example: **Test Plans Under Review**).

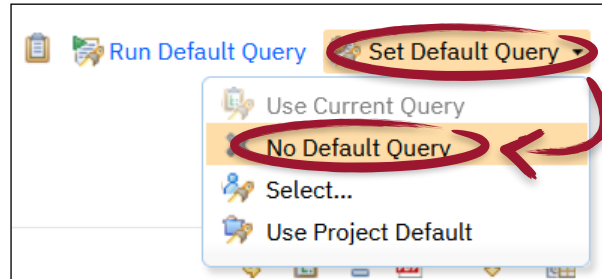


By **hovering** over **Run Default Query** the information about the query can be displayed.



To *delete* the default query:

- Click on **Set Default Query** in the top right corner, which will display a *context menu*.
- Select the entry **No default Query**.



The default query will be deleted immediately without further inquiry for confirmation.

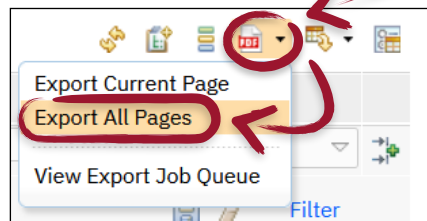
## Export List Views

A list view can be *exported* as a PDF or CSV file.

To export the list view as **PDF**:

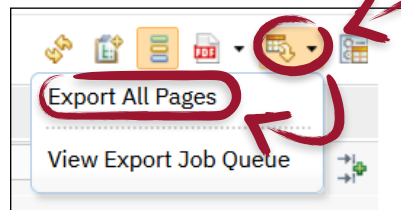
Click the **Export PDF** icon and then select either

- **Export Current Page** or
- **Export All Pages**  
(as shown in the picture below).



To export the list view as **CSV**:

Click the **Export as Spreadsheet (CSV)** icon and then select **Export All Pages**.



You will be automatically redirected to the **Manage Export Job Queue** page. Once the document has been created (**Percentage Complete = 100%**), you can start the download (or open the document directly) by clicking on the **document name**. For test plans this is always **Test Plan.pdf** for PDF exports and **Test Plan.csv** for CSV exports.

Test Plans /

### Manage Export Job Queue ?

View: My Export Jobs

Number of Items Per Page: 10

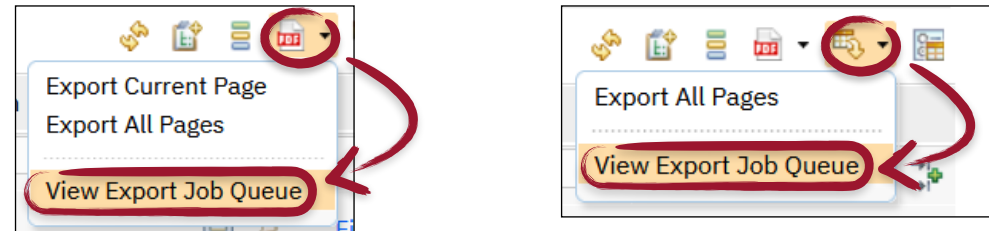
Previous | **1** | Next

| <input type="checkbox"/> | Request Time | File Name                     | Document Type      | Owner       | Status | Percent Complete | Completion Time |   |
|--------------------------|--------------|-------------------------------|--------------------|-------------|--------|------------------|-----------------|---|
| <input type="checkbox"/> | 1 minute ago | <a href="#">Test Plan.pdf</a> | Table Summary      | ELM-Trainer | ✓      | 100%             | 1 minute ago    | → |
| <input type="checkbox"/> | 1 hour ago   | <a href="#">Test Plan.csv</a> | Spreadsheet (.csv) | ELM-Trainer | ✓      | 100%             | 1 hour ago      | → |

To return, click on **Test Plans** (or the name of whichever list view the export was started from) in the top left.

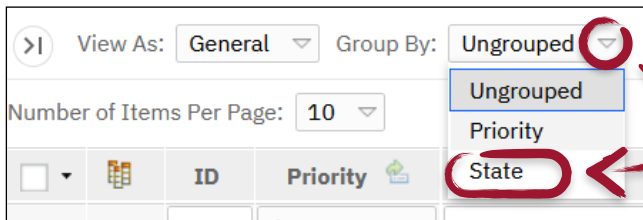


The page **Manage Export Job Queue** can be accessed again at any time using one of the export icons via the **View Export Job Queue** menu entry.



## Group the list

The list can be **grouped** by all columns except those that contain free text (such as the test artifact name) or links.  
To activate grouping, select the corresponding column in the **Group By** selection box. In the example: **State**.  
To deactivate, select **Ungrouped**.



In the example below, the list has been grouped by **State**. There are two test plans in **Draft** state and one in **Under Review** state.

Test Plans

View As: General

Group By: State

Number of Items Per Page: 10

Previous | 1 | Next

| ID                                                           | Priority | Name                             | Validates Requirement Collection     | State        |
|--------------------------------------------------------------|----------|----------------------------------|--------------------------------------|--------------|
| <div> <div>Draft</div> <div>(1 - 2 of 2)</div> </div>        |          |                                  |                                      |              |
| 1                                                            |          | ACC Release 1.0 System Test P... | ACC System Specifications (View: ... | Draft        |
| 2                                                            |          | ParkAssist Release 1.0 System... | ParkAssist System Specifications ... | Draft        |
| <div> <div>Under Review</div> <div>(1 - 1 of 1)</div> </div> |          |                                  |                                      |              |
| 3                                                            |          | ADAS Release 1.0 System Test...  | ADAS System Specifications (View...  | Under Review |

## Open a Test Artifact

To **open** a test artifact (e.g. a test plan), simply click on its **name** in the list view.

|                              |                                  |                     |       |                                       |  |
|------------------------------|----------------------------------|---------------------|-------|---------------------------------------|--|
| Number of Items Per Page: 10 |                                  | Previous   1   Next |       |                                       |  |
| <input type="checkbox"/>     | Name ↕                           | Priority            | State | Validates Requirement Collection      |  |
| <input type="checkbox"/>     | ACC Release 1.0 System Test Plan |                     | Draft | ACC System Specifications (View: ...) |  |

The individual sections of the test artifact (in the example: the test plan) can then be displayed or edited.

- For test plans: See chapter *Test Plan Sections* in *ETM Quick Start Guide 02*.
- For test cases: See chapter *Test Case Sections* in *ETM Quick Start Guide 03*.
- For test scripts: See chapter *Test Script Sections* in *ETM Quick Start Guide 03*.
- For test cases execution records: See chapter *Test Case Execution Records Sections* in *ETM Quick Start Guide 03*.

## Rename a Test Artifact

To **rename** a test artifact in the list view, hover over its **name** until a pencil icon appears.

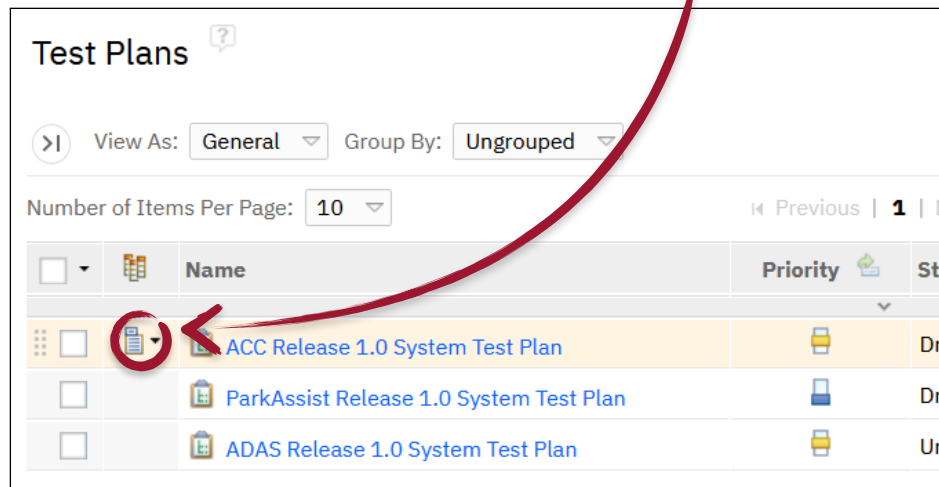
|                                      |                                  |
|--------------------------------------|----------------------------------|
| Test Plans ?                         |                                  |
| View As: General Group By: Ungrouped |                                  |
| Number of Items Per Page: 10         |                                  |
| <input type="checkbox"/>             | Name                             |
| <input type="checkbox"/>             | ACC Release 1.0 System Test Plan |

Now the cursor is placed in the test artifact name and you can directly edit its name.

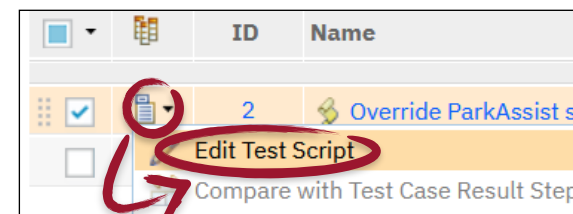
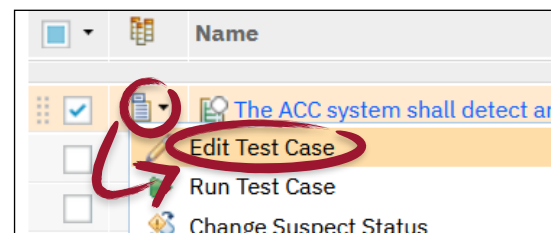
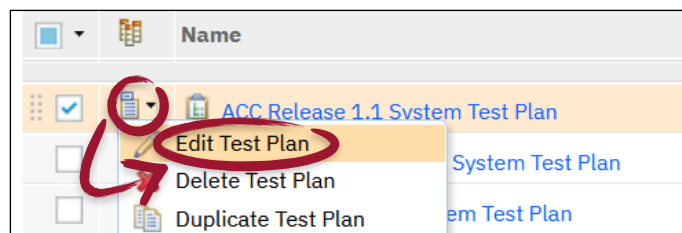
|                                      |                                  |
|--------------------------------------|----------------------------------|
| Test Plans ?                         |                                  |
| View As: General Group By: Ungrouped |                                  |
| Number of Items Per Page: 10         |                                  |
| <input type="checkbox"/>             | Name                             |
| <input type="checkbox"/>             | ACC Release 1.1 System Test Plan |

## Use the Context Menu to rename a Test Artifact

Alternatively, you can use the context menu of the corresponding test artifact.  
To do this, hover over the row in the list to display the *context menu icon* in the context menu column.

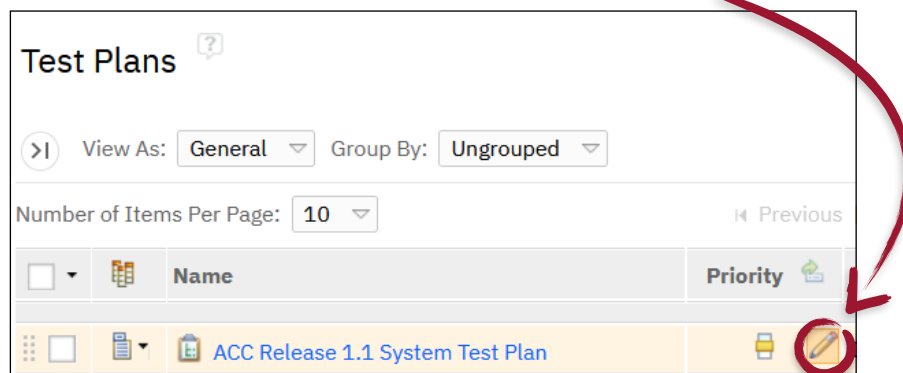


Click on this icon and select *Edit Test Plan* (or *Edit Test Case* or *Edit Test Script* etc. accordingly).

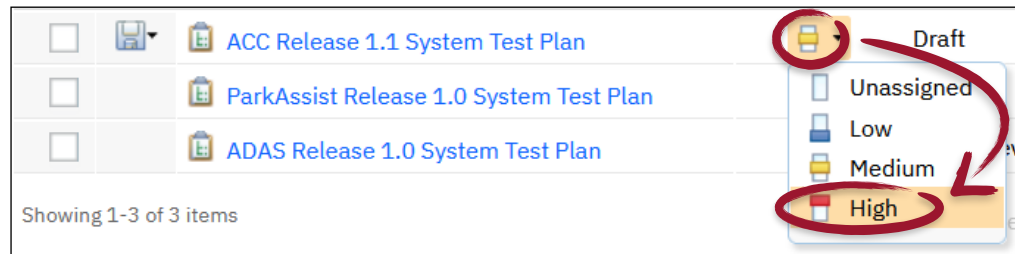


## Editing Enumeration Attribute Values

The values of *enumeration* attributes can be changed directly in the corresponding *column* of the list view (in the example below: the *Priority*).  
As soon as you hover over one of these columns a *pencil* icon appears and you can click on it to open a selection box with the defined values.

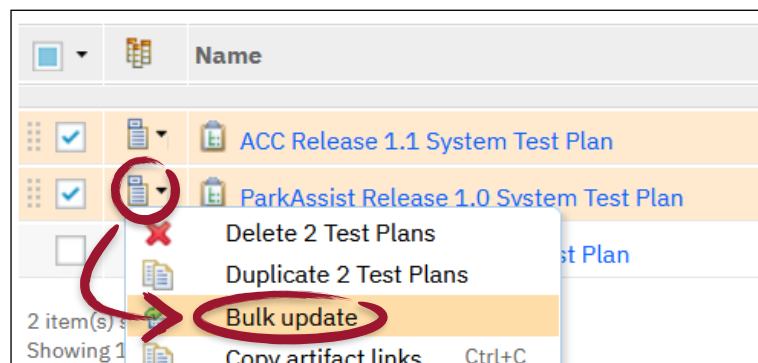


By selecting a new value in the selection box, it is *immediately* changed for the selected test artifact and no additional click on a **Save** button is necessary (as is the case with an open test artifact).



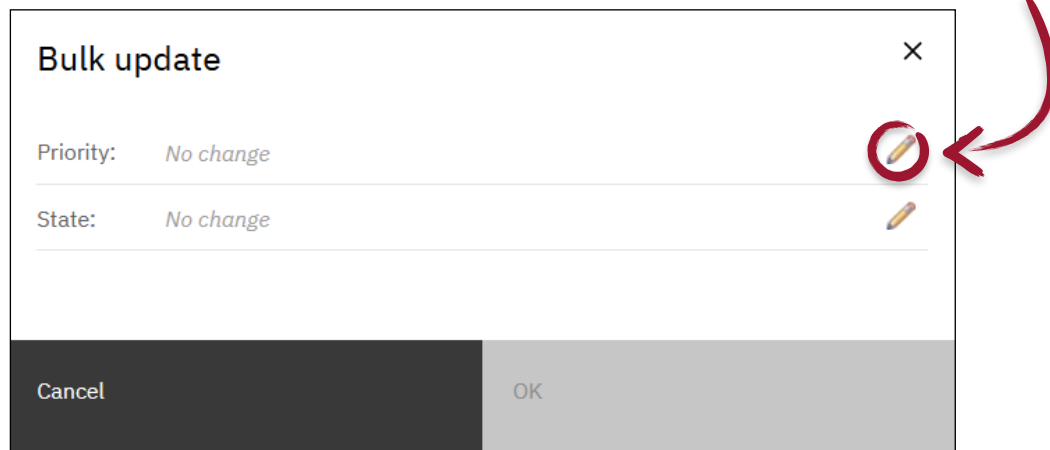
## Bulk Update Attributes

*Multiple* test artifact *lines* can be updated at the *same time*, meaning the attribute value can be changed to the same value (*bulk update*). To do this, select two or more lines in the list view and then select the entry **Bulk update** via one of the *context menu* icons.

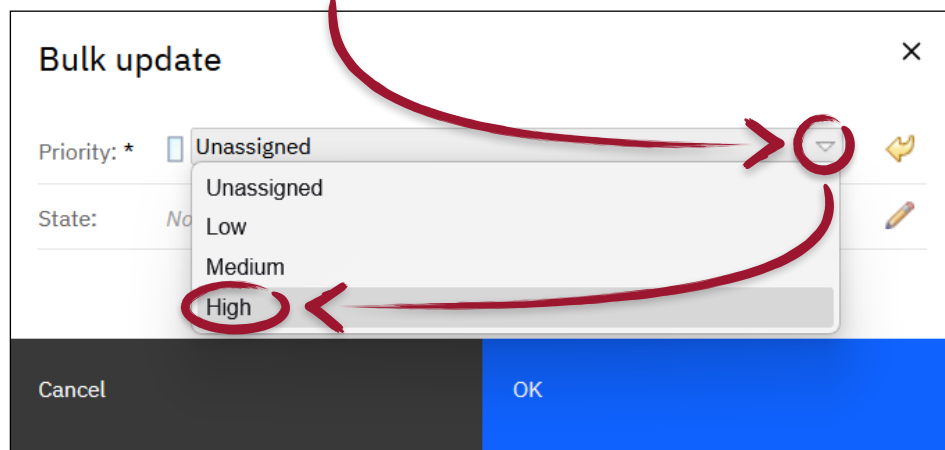


A **Bulk Update** dialog opens.

All editable columns are displayed there. To change the value of a column, click the *pencil* icon to the right of the column name (in the example: **Priority**).

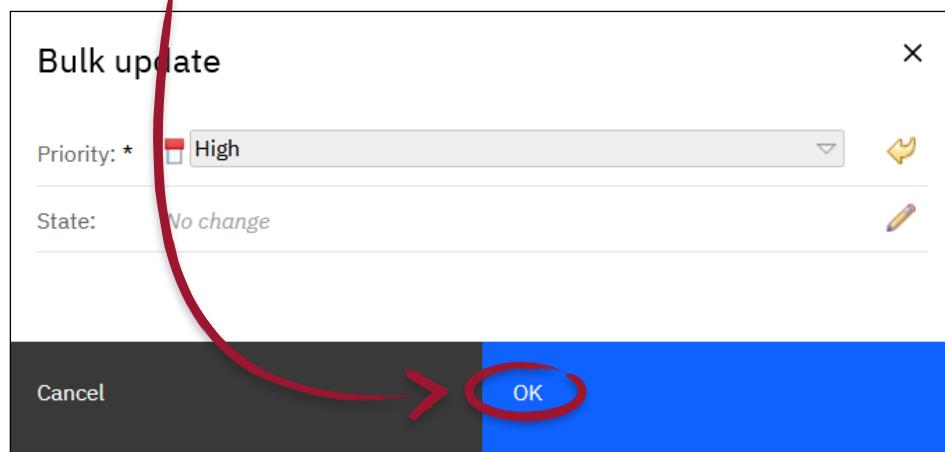


This opens a *drop-down list* from which you can select the new value (in the example: *High*).



The screenshot shows a 'Bulk update' dialog box. The 'Priority' field is set to 'Unassigned' and the dropdown menu is open, showing options: 'Unassigned', 'Low', 'Medium', and 'High'. The 'High' option is selected and circled in red. A red arrow points from the 'Priority' field to the dropdown menu. Another red arrow points from the 'High' option to the 'OK' button. The 'State' field is set to 'No change'. The 'Cancel' button is on the left and the 'OK' button is on the right.

Finally, click *OK* to apply the changes.



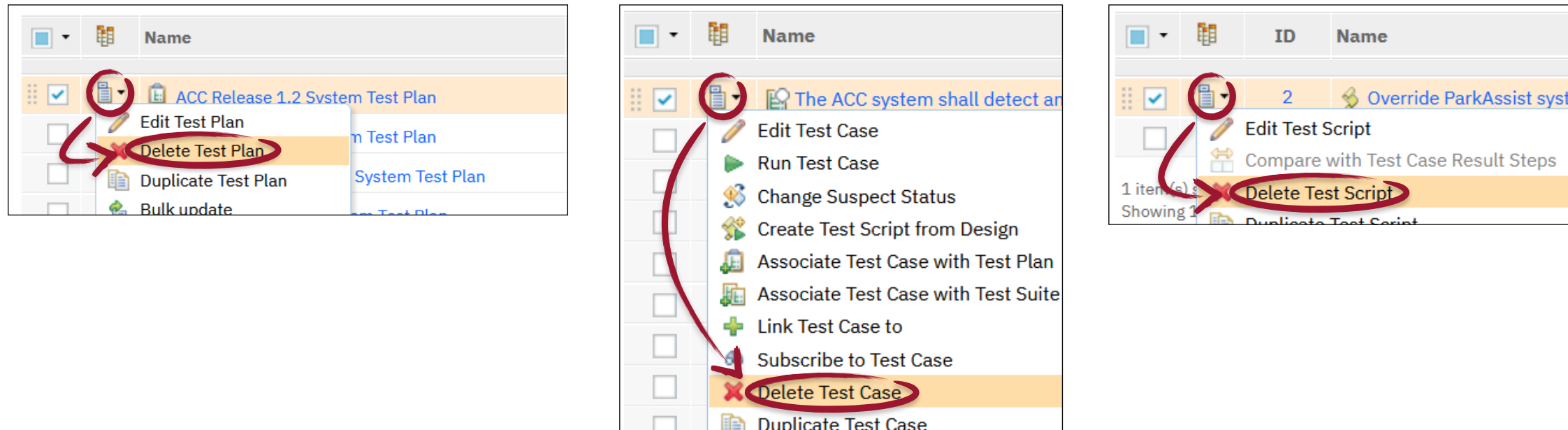
The screenshot shows the 'Bulk update' dialog box with the 'Priority' field set to 'High'. The 'OK' button is circled in red, and a red arrow points from the 'OK' button to the 'Cancel' button. The 'State' field is set to 'No change'.

The values are *immediately* changed for the selected test plans and no additional click on a **Save** button is necessary (as is the case with an open test plan).

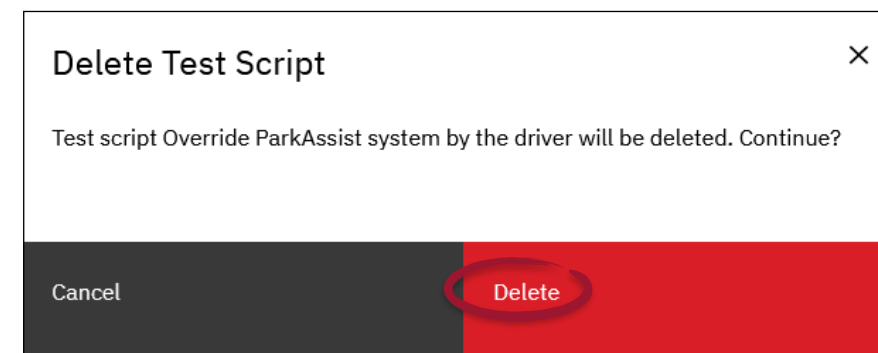
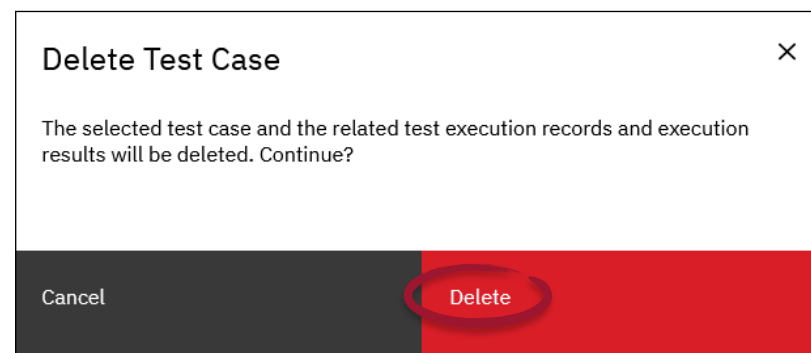
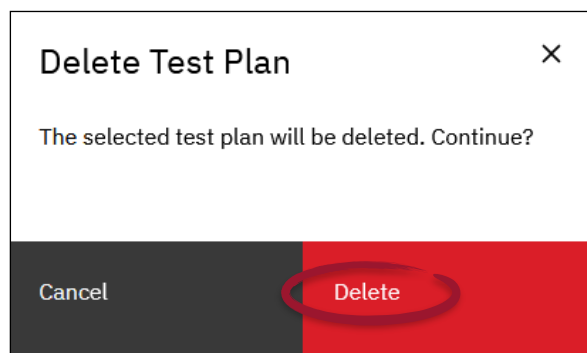
| <input type="checkbox"/> |  | Name                                    | Priority | Sta |
|--------------------------|--|-----------------------------------------|----------|-----|
| <input type="checkbox"/> |  | ACC Release 1.1 System Test Plan        |          | Dra |
| <input type="checkbox"/> |  | ParkAssist Release 1.0 System Test Plan |          | Dra |
| <input type="checkbox"/> |  | ADAS Release 1.0 System Test Plan       |          | Un  |

## Delete a Test Artifact

To **delete** a test artifact in the list view, hover over the corresponding row to display the context menu and then select **Delete Test Plan** (or **Delete Test Case** or **Delete Test Script** etc. accordingly).



A **Delete Test Plan** (or **Delete Test Case** or **Delete Test Script** etc. accordingly) dialog opens. Click on **Delete**.



The test artifact is only **removed** from the list, but **not permanently** deleted. You can find it in the **trash** and restore it if necessary (see chapter [Working with the Trash](#) below).

## 7 WORKING WITH THE TRASH

### Deleted Test Artifacts (e.g. from the List View)

When you **delete** test artifacts (e.g. test plans, test cases, etc.), they are actually **moved** to the **Trash** i.e. they are only **removed** from the corresponding view. From the **Trash** page, the test artifacts can then be restored or permanently deleted.

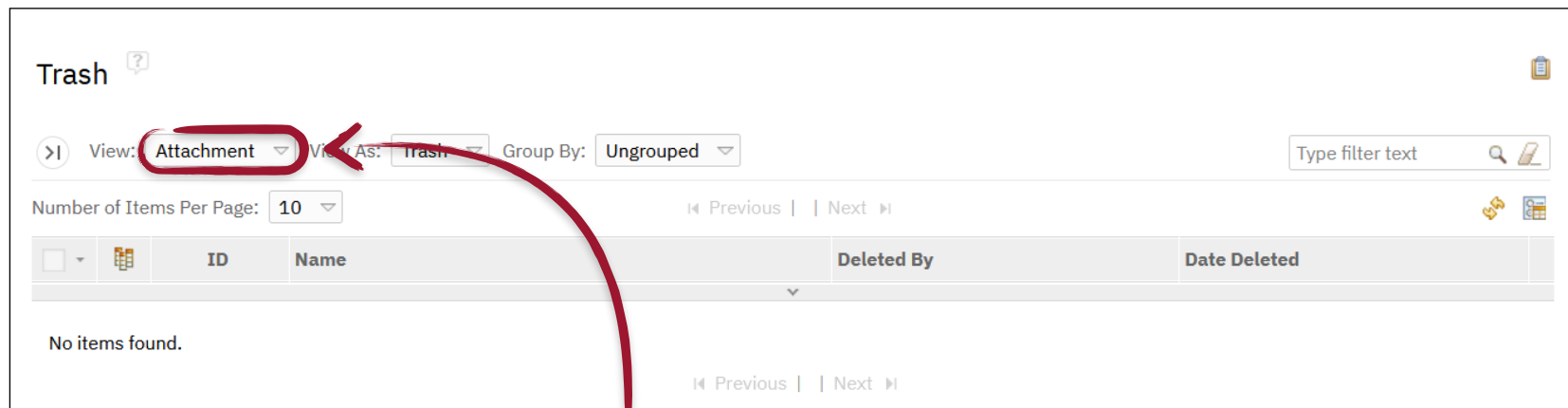
### Trash Page

To **open** the **Trash** page, do the following:

- Open the **Administration Menu** (Gearwheel icon).
- Select **View Trash**.

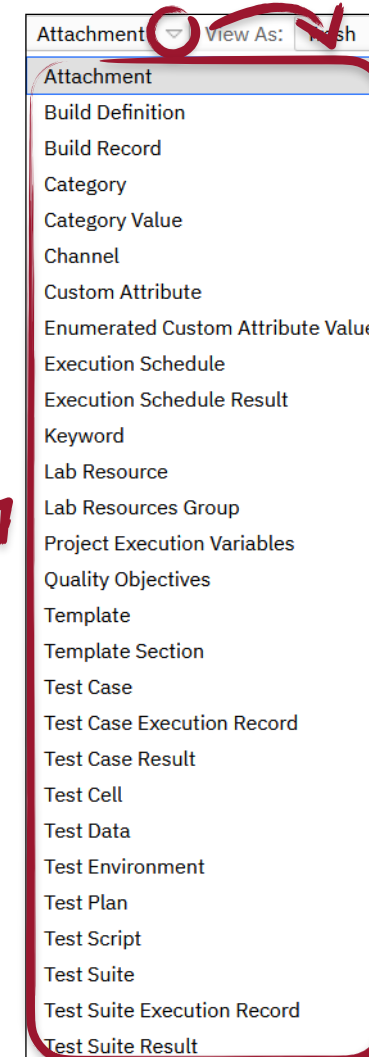


This opens the **Trash** page. By default, the removed (but not permanently deleted) **attachments** are displayed.



The dropdown list in the **View** field allows you to select which test artifact **type** should be displayed in the list.

It contains the following entries:



Example of a list of removed *test plans*:

Trash

>|

View: **Test Plan**

View As: **Trash**

Group By: **Ungrouped**

Type filter text

Number of Items Per Page: 10

Previous | 1 | Next

|                          | ID | Name                                    | Deleted By  | Date Deleted  |
|--------------------------|----|-----------------------------------------|-------------|---------------|
| <input type="checkbox"/> | 6  | ADAS Release 1.3 System Test Plan       | ELM-Trainer | 3 minutes ago |
| <input type="checkbox"/> | 7  | ParkAssist Release 1.3 System Test Plan | ELM-Trainer | 3 minutes ago |

Showing 1-2 of 2 items

Previous | 1 | Next

Trash

>|

View: **Test Plan**

View As: **Trash**

Group By: **Ungrouped**

Type filter text

Number of Items Per Page: 10

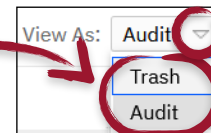
Previous | 1 | Next

|                          | ID | Name                                    |
|--------------------------|----|-----------------------------------------|
| <input type="checkbox"/> | 6  | ADAS Release 1.3 System Test Plan       |
| <input type="checkbox"/> | 7  | ParkAssist Release 1.3 System Test Plan |

Showing 1-2 of 2 items

Previous | 1 | Next

Using the **View As** field, you can switch whether the *removed* elements (selection: *Trash*) or the *permanently deleted* elements (selection: *Audit*) should be listed for the selected test artifact type.



Example of the *Audit* view of test plans (i.e. *permanently deleted*).

Trash

>|

View: **Test Plan**

View As: **Audit**

Group By: **Ungrouped**

Type filter text

Number of Items Per Page: 10

Previous | 1 | Next

|  | ID | Deleted By  | Date Deleted   |
|--|----|-------------|----------------|
|  | 5  | ELM-Trainer | 10 minutes ago |
|  | 7  | ELM-Trainer | 1 minute ago   |

Showing 1-2 of 2 items

Previous | 1 | Next

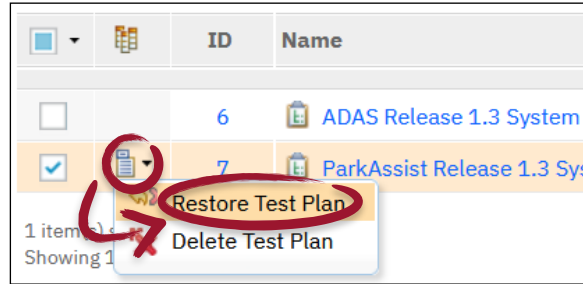


When you *permanently delete* a test artifact from the *Trash* page, no rows are physically removed from the database. The item *ID* still exists, but the fields on the item and history are replaced with empty values.

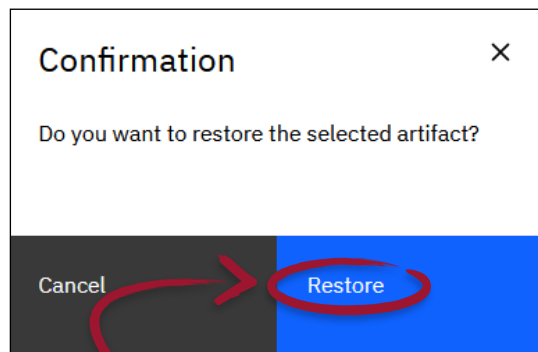
## Restoring a Test Artifact

To **restore** a test artifact (in the example: **test plan**), do the following:

- Select the artifact
- From its context menu, select **Restore Test Plan**



A **Confirmation** dialog opens.

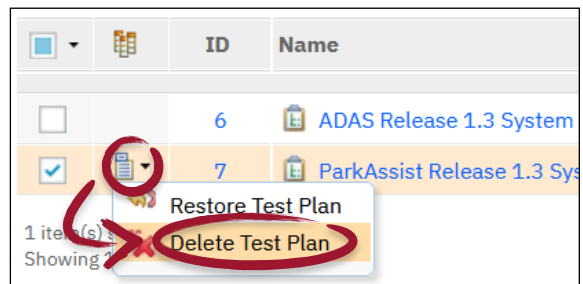


Click on **Restore** to actually restore the test artifact.

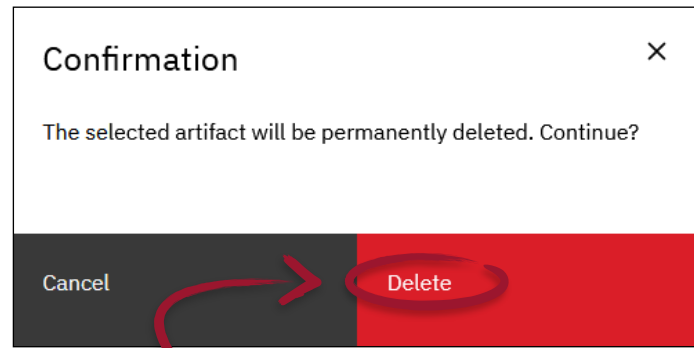
## Permanently deleting a Test Artifact

To **permanently delete** a test artifact (in the example: **test plan**), do the following:

- Select the artifact
- From its context menu, select **Delete Test Plan**



A *Confirmation* dialog opens.



Click on **Delete** to actually permanently delete the test artifact.



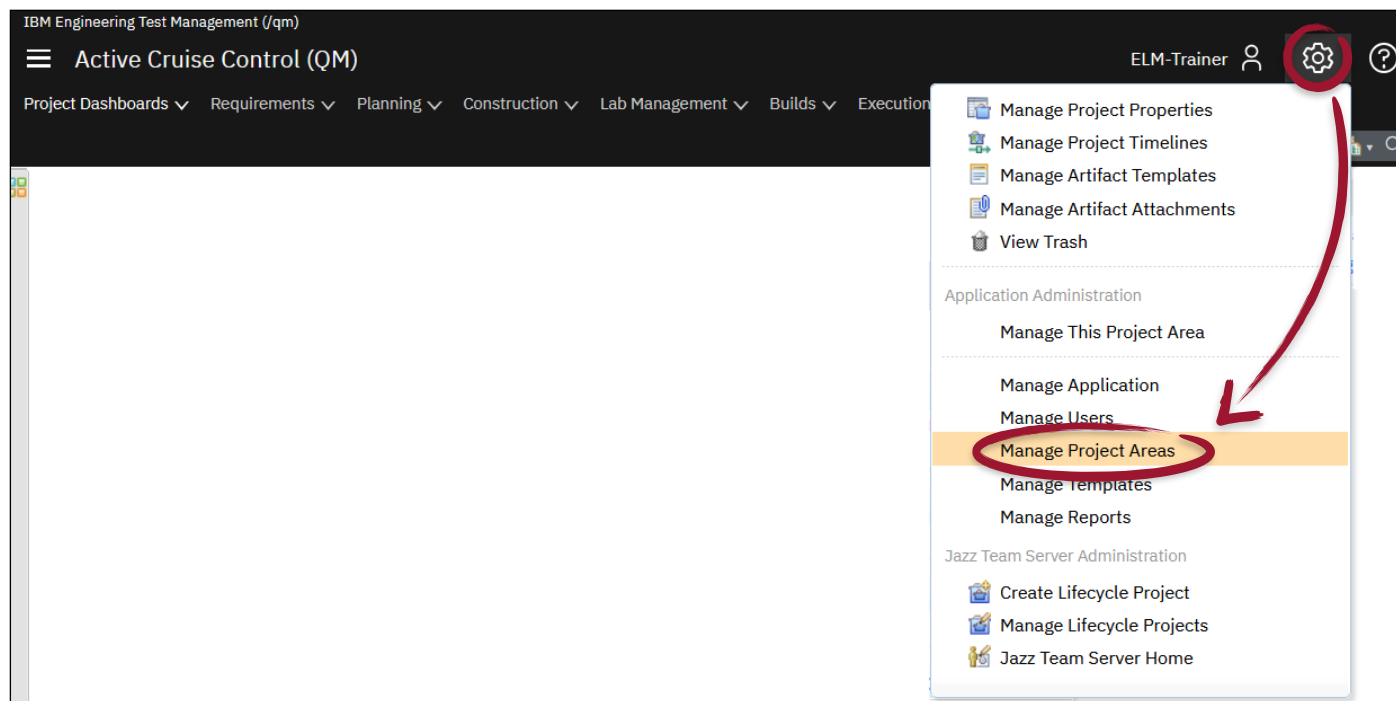
Because test artifacts often depend on other test artifacts, deleting or restoring one artifact *can affect several other artifacts*. In general, when an artifact is deleted or restored, its linked artifacts *remain unchanged*. For instance, deleting a test case, does not delete its associated test scripts. However, artifacts that link to the deleted artifact no longer show the link. For example, if a test case is deleted, a test plan that links to that test case no longer shows the link to the test case. For *exceptions* to this behavior, see the corresponding table in the original IBM ETM documentation (Topic: artifacts-deleting-restoring-test).

## 8 CREATE A NEW PROJECT AREA

### Create the new Project Area for Active Cruise Control

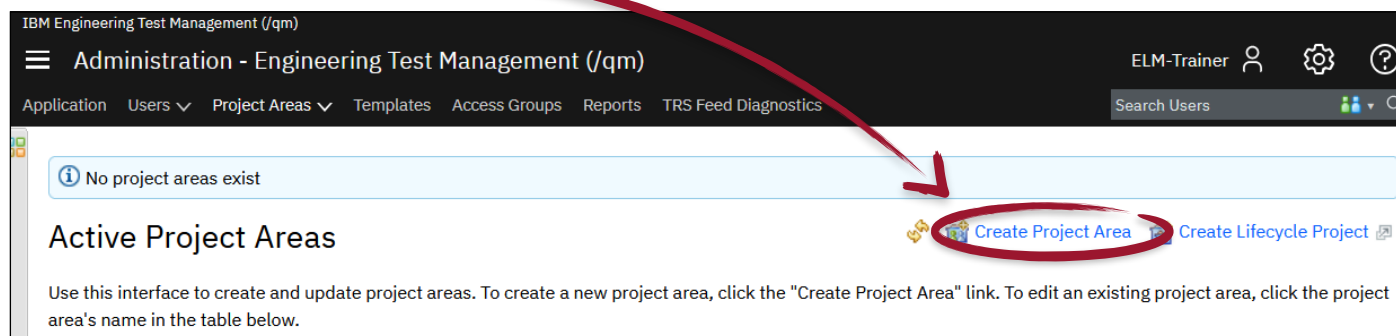
To *create a new project area*, do the following:

- Open the *Administration Menu* (Gearwheel icon)
- Select *Manage Project Areas*.



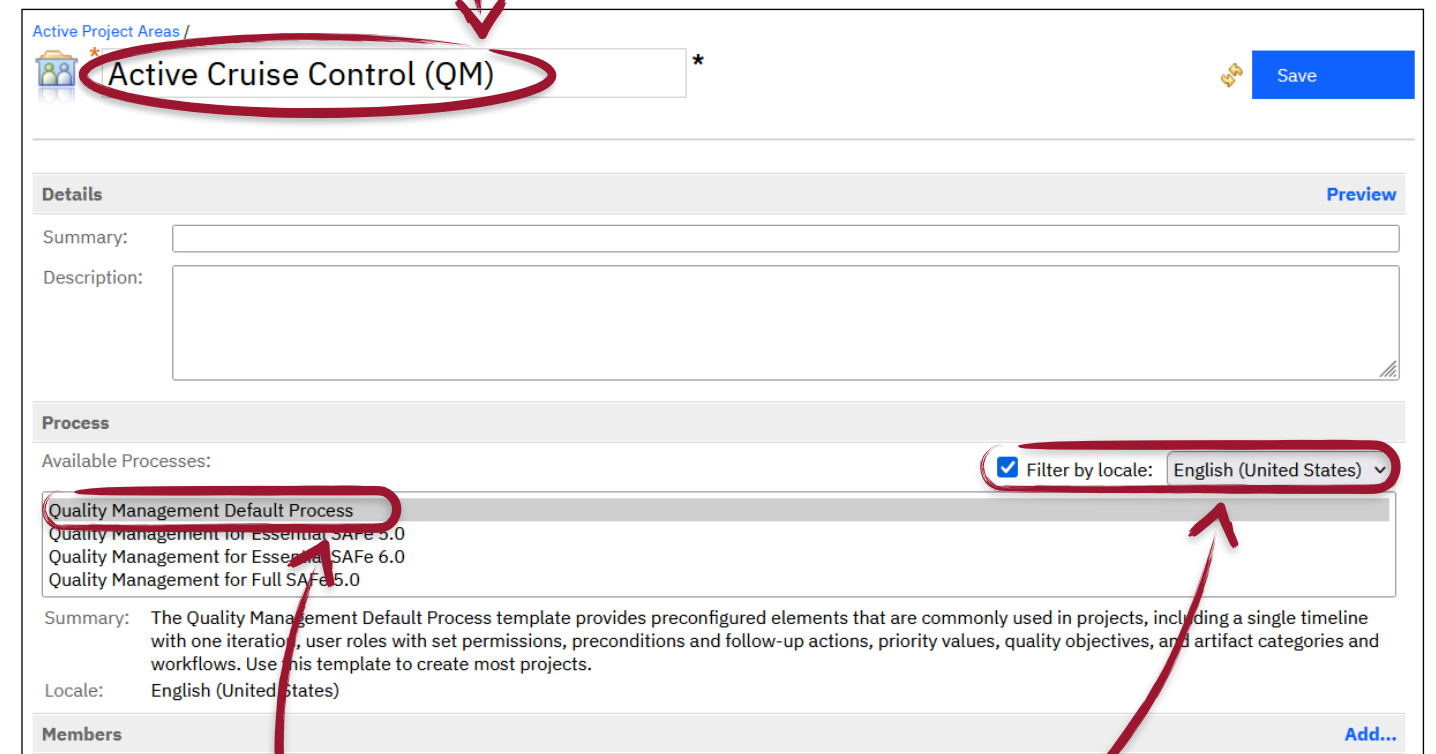
This opens the list of *Active Project Areas*.

Here, click on *Create Project Area*.



A page for defining the new project area is displayed. Enter / select the following:

- In the top field, enter the *name* of the new project area. In the example: *Active Cruise Control (QM)*.



In section *Process*:

- Use the selection *Quality Management Default Process* unless your administrator specifies no other default.
- *Filter by locale*: It is strongly recommended to use the *English (United States)* setting.

- Finally, click on the blue *Save* button in the top right corner to actually create the new project area.



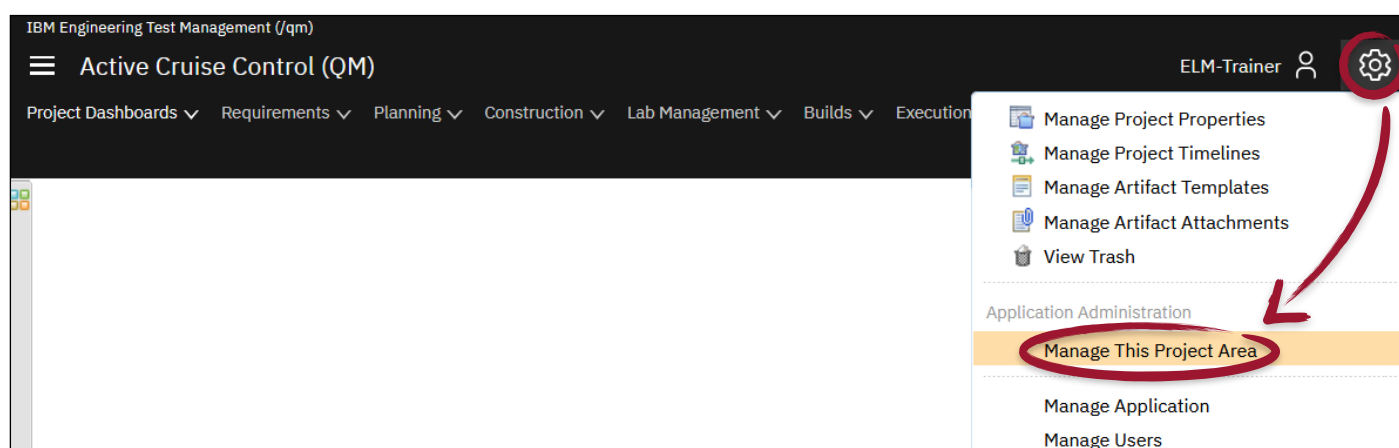
## 9 ADD ASSOCIATIONS TO DNG / EWM

### Associations between Project Areas

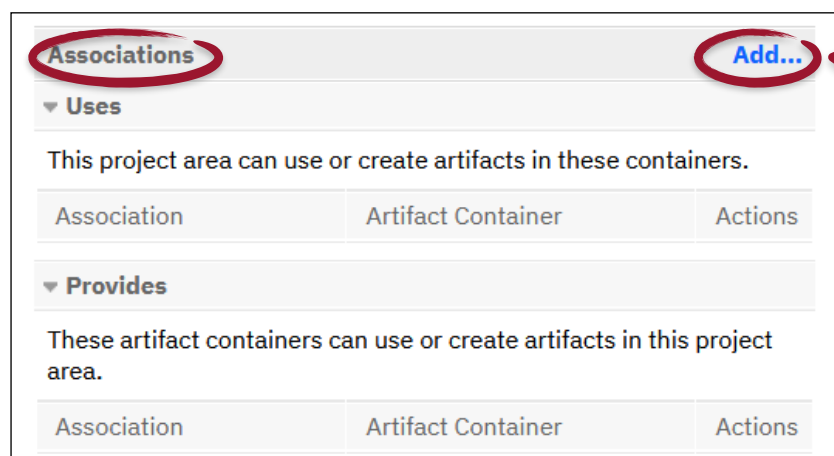
**Associations** between project areas of different ELM tools (such as ETM, DNG and EWM) makes it possible to link items between these different tools. For example, with the proper association its is possible to link a requirement (in DNG) with a test case (in ETM) or with a change request (in EWM).

To define an association in the current project area in ETM (for example, the just created project area **Active Cruise Control (QM)**) do the following:

- Click on the gear wheel icon to open the **Administration Menu** and then select **Manage This Project Area** to open its **administration page**.



- Scroll down to the bottom of the administration page to section **Associations** and click on **Add**.



An **Add Association** dialog opens - see next sections.

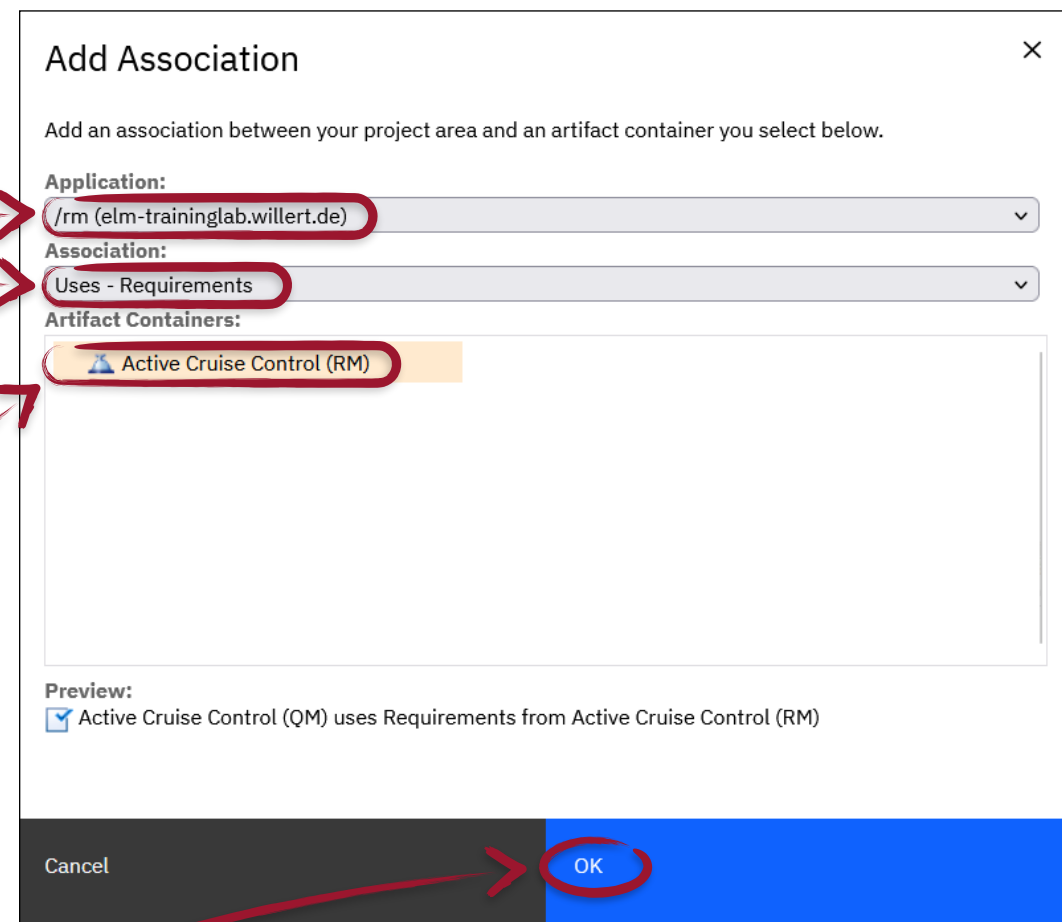
### Add Association to DNG

To define that ETM test artifacts can be linked to DNG artifacts (e.g. a test case to a requirement) ...

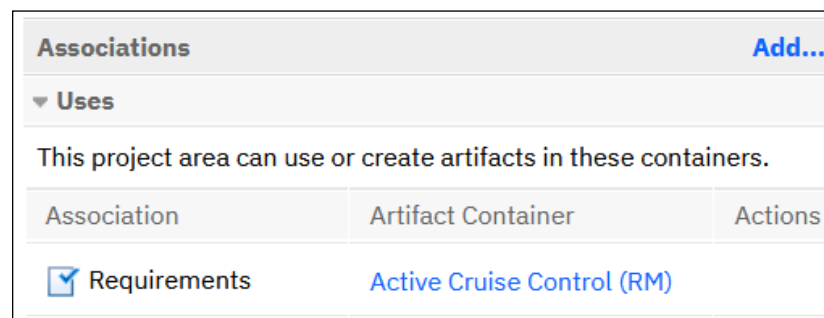
In field **Application**, select **/rm** for Requirements Management (i.e. this is the DNG application).

In field **Association**, select **Uses Requirements**.

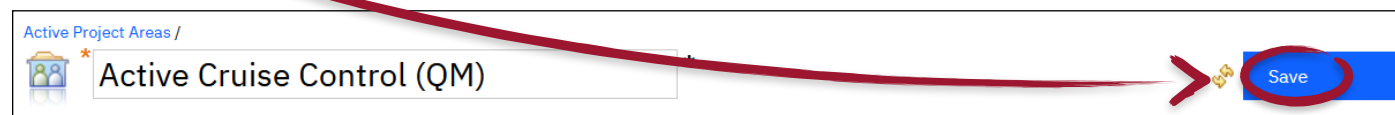
In field **Artifact Container**, select the project area in which the requirements to be linked are located. In the example: **Active Cruise Control (RM)**.



After clicking on **OK**, the new association will be displayed:



Click on the blue **Save** button in the top right corner to save the changes.



## Add Association to EWM

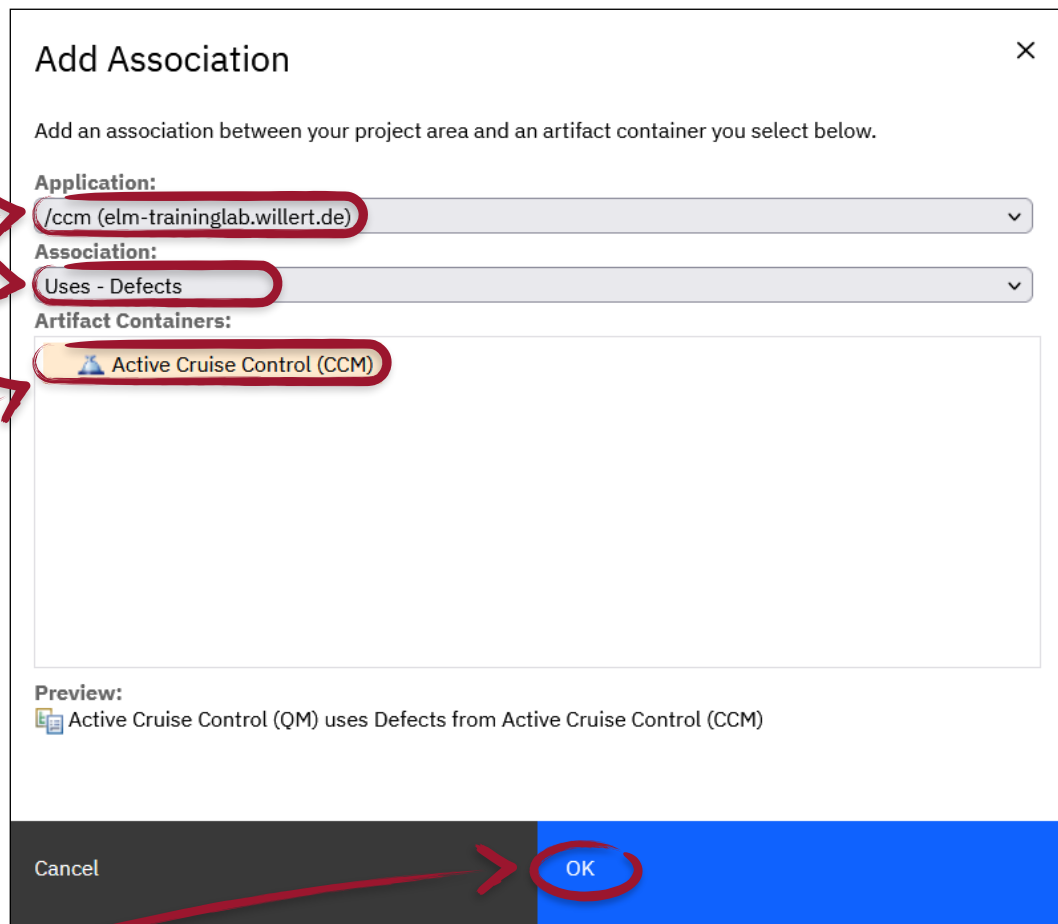
### Defects

To define that EWM work Items can be linked to test artifacts as defects ...

In field **Application**, select **/ccm** for Change & Configuration Management (i.e. this is the EWM application).

In field **Association**, select **Uses Defects**.

In field **Artifact Container**, select the project area in which the defect work items are located that should be linked to the test artifacts. In the example: **Active Cruise Control (CCM)**.



Click on **OK** to actually create the association.

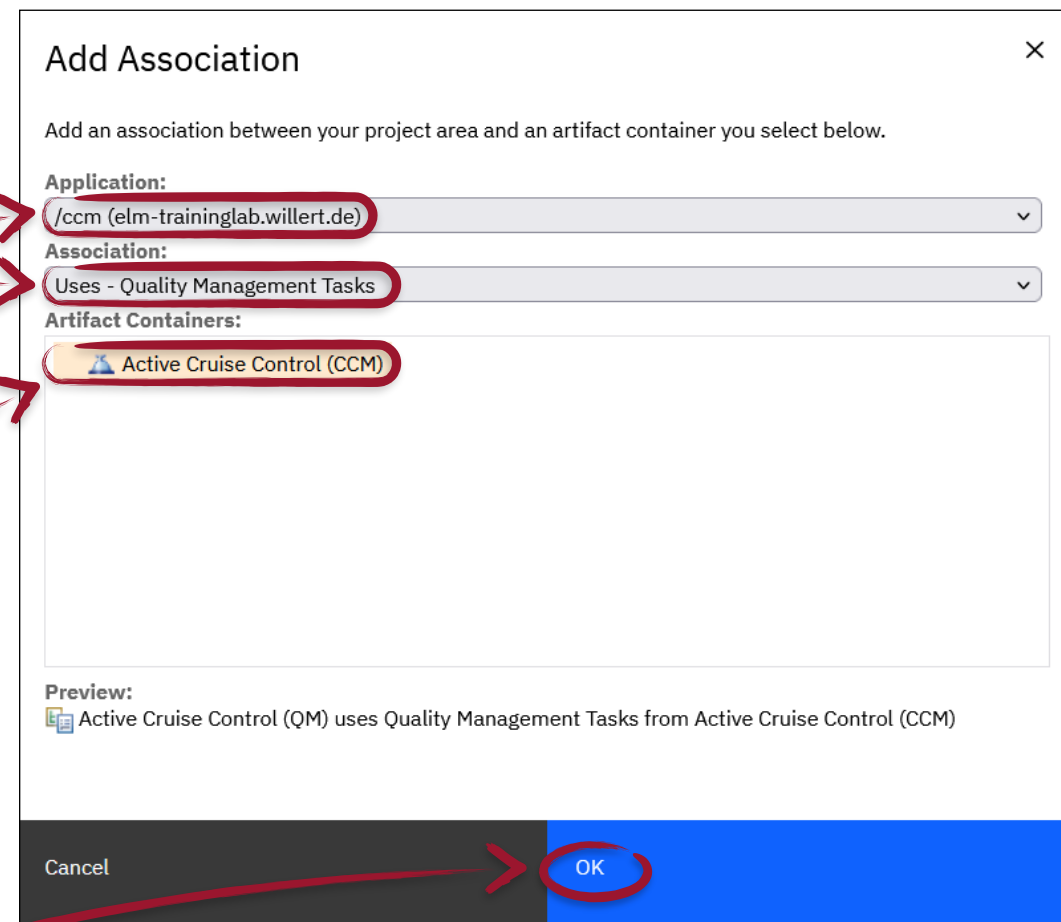
### Quality Management Tasks

To define that EWM work Items can be linked to test artifacts as quality management tasks ...

In field **Application**, select **/ccm** for Change & Configuration Management (i.e. this is the EWM application).

In field **Association**, select **Uses Quality Management Tasks**.

In field **Artifact Container**, select the project area in which the quality management work items are located that should be linked to the test artifacts. In the example: **Active Cruise Control (CCM)**.

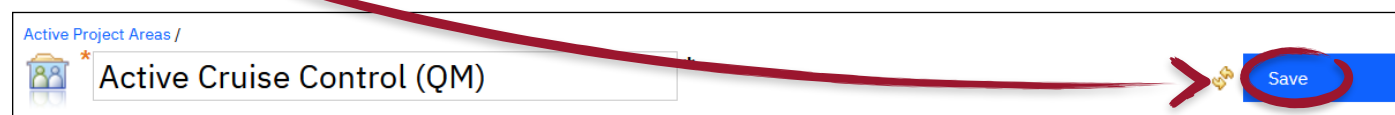


Click on **OK** to actually create the association.

The additional associations will be displayed:

| Associations <span>Add...</span>                                   |                             |         |
|--------------------------------------------------------------------|-----------------------------|---------|
| ▼ Uses                                                             |                             |         |
| This project area can use or create artifacts in these containers. |                             |         |
| Association                                                        | Artifact Container          | Actions |
| ✓ Requirements                                                     | Active Cruise Control (RM)  |         |
| Defects                                                            | Active Cruise Control (CCM) |         |
| Quality Management Tasks                                           | Active Cruise Control (CCM) |         |

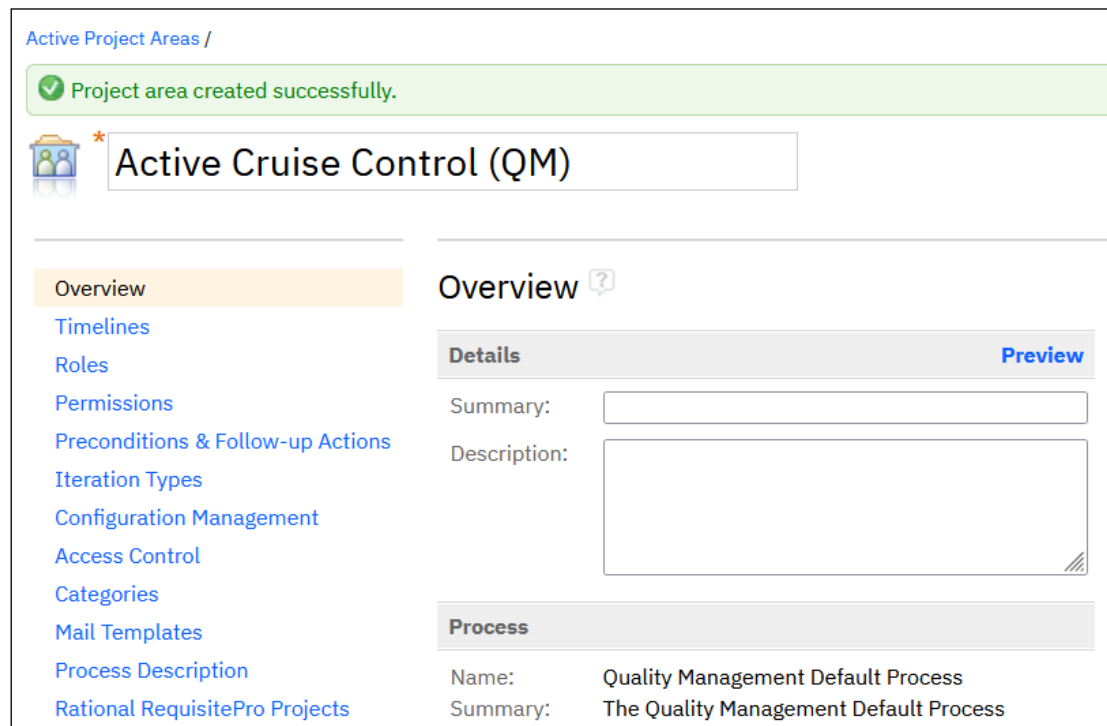
Click on the blue **Save** button in the top right corner to save the changes.



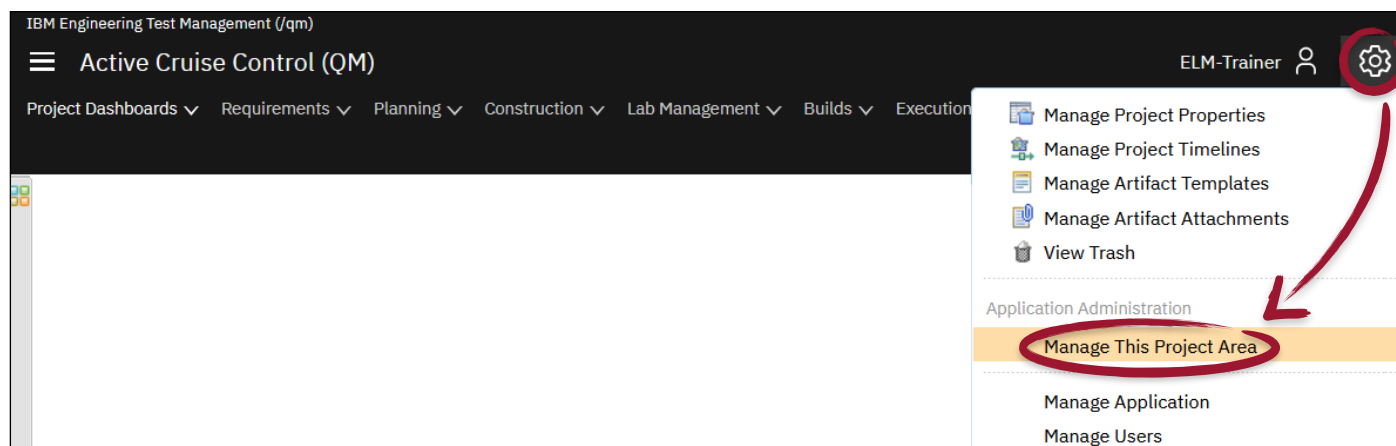
# 10 ADD USERS AND ASSIGN ROLES

After the new project area has been created, the users (i.e. members) must be added and assigned the appropriated roles.

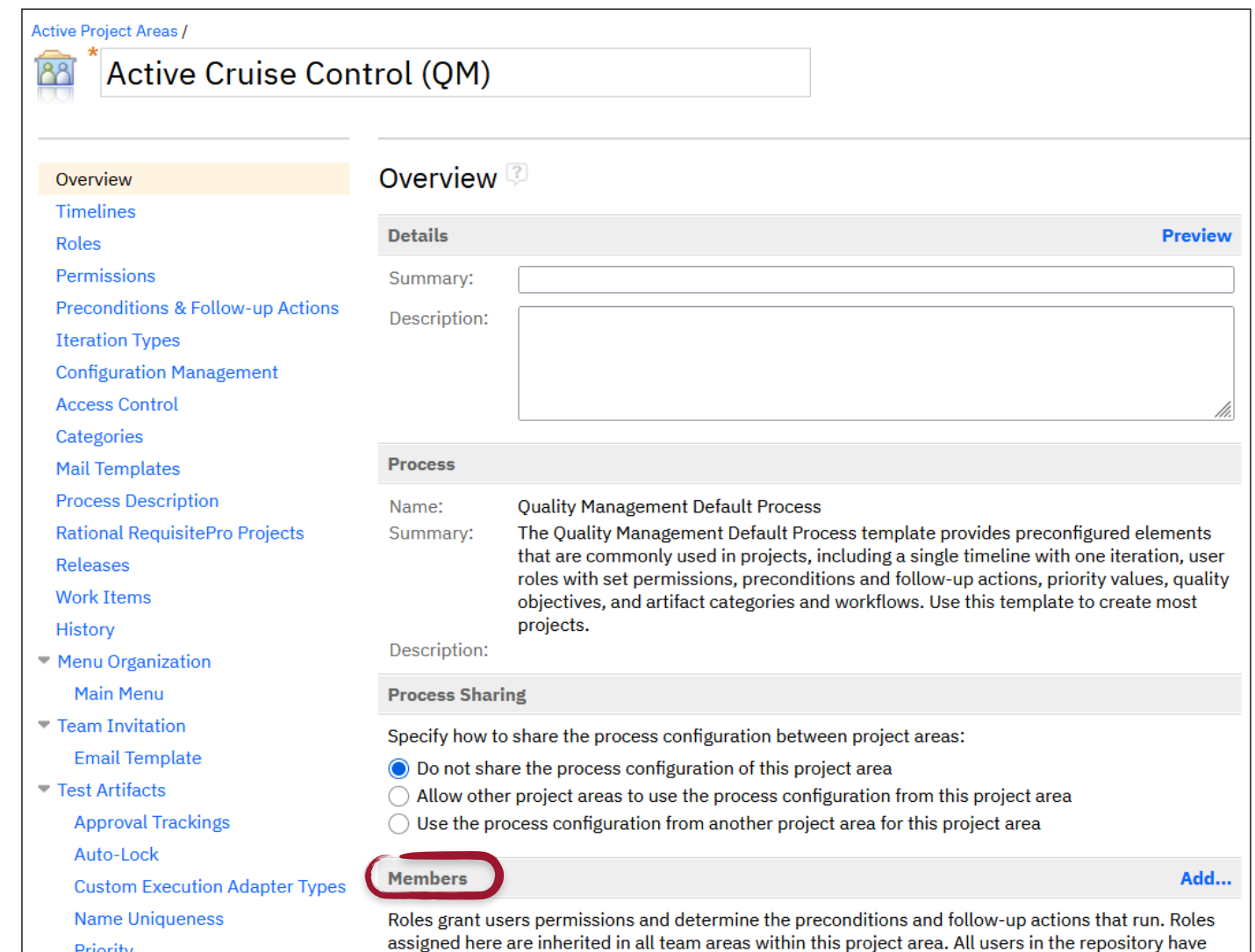
If a new project area has just been created (see previous chapter *Create a new Project Area*) you are already on its *administration page*.



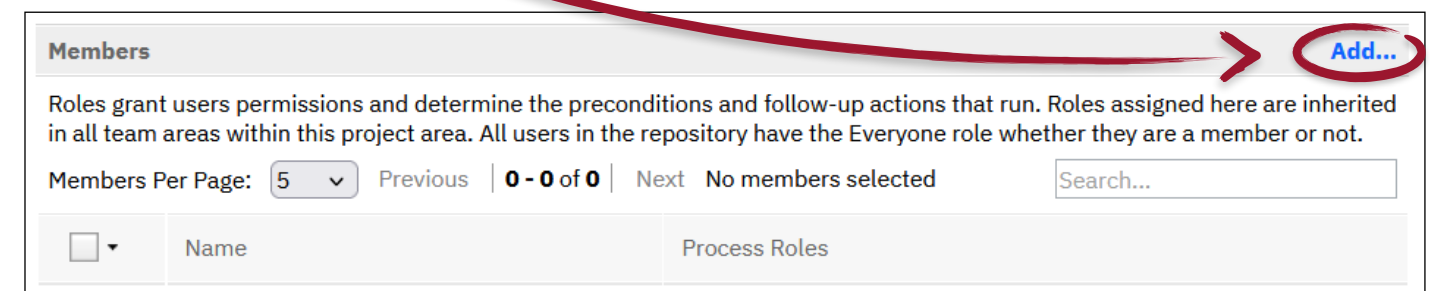
Otherwise, click on the gear wheel icon to open the *Administration Menu* and then select *Manage This Project Area* to open its *administration page*.



On the administration page of the current project area, scroll down to section *Members*.



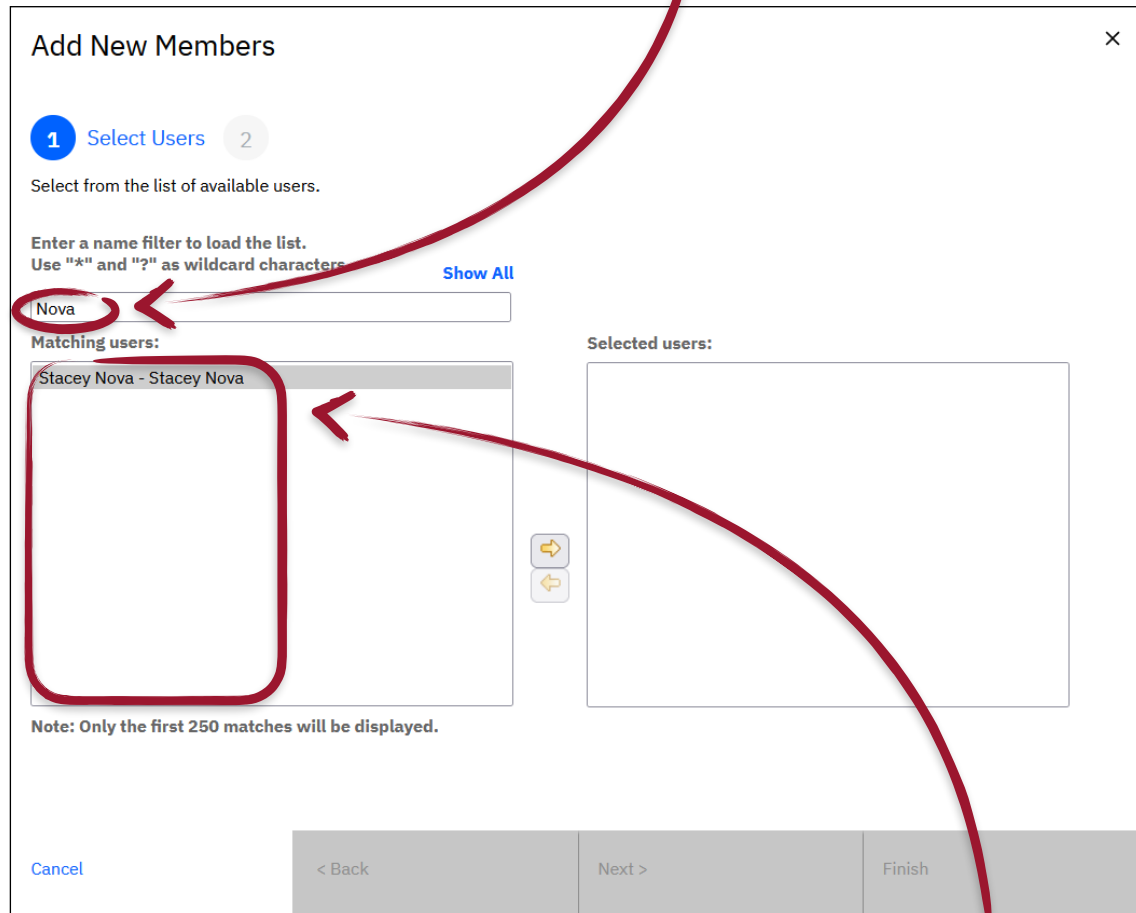
In section *Members* click on *Add*:



An **Add New Members** dialog opens.

For each user to be added to the project area **repeat** the following steps:

1. Enter the name of the user (or part of it) in the **name** field. As a wildcard you can use '?' for exactly one character or '\*' for any number of characters.



**Add New Members**

1 Select Users 2

Select from the list of available users.

Enter a name filter to load the list.  
Use "\*" and "?" as wildcard characters. [Show All](#)

Nova

Matching users:

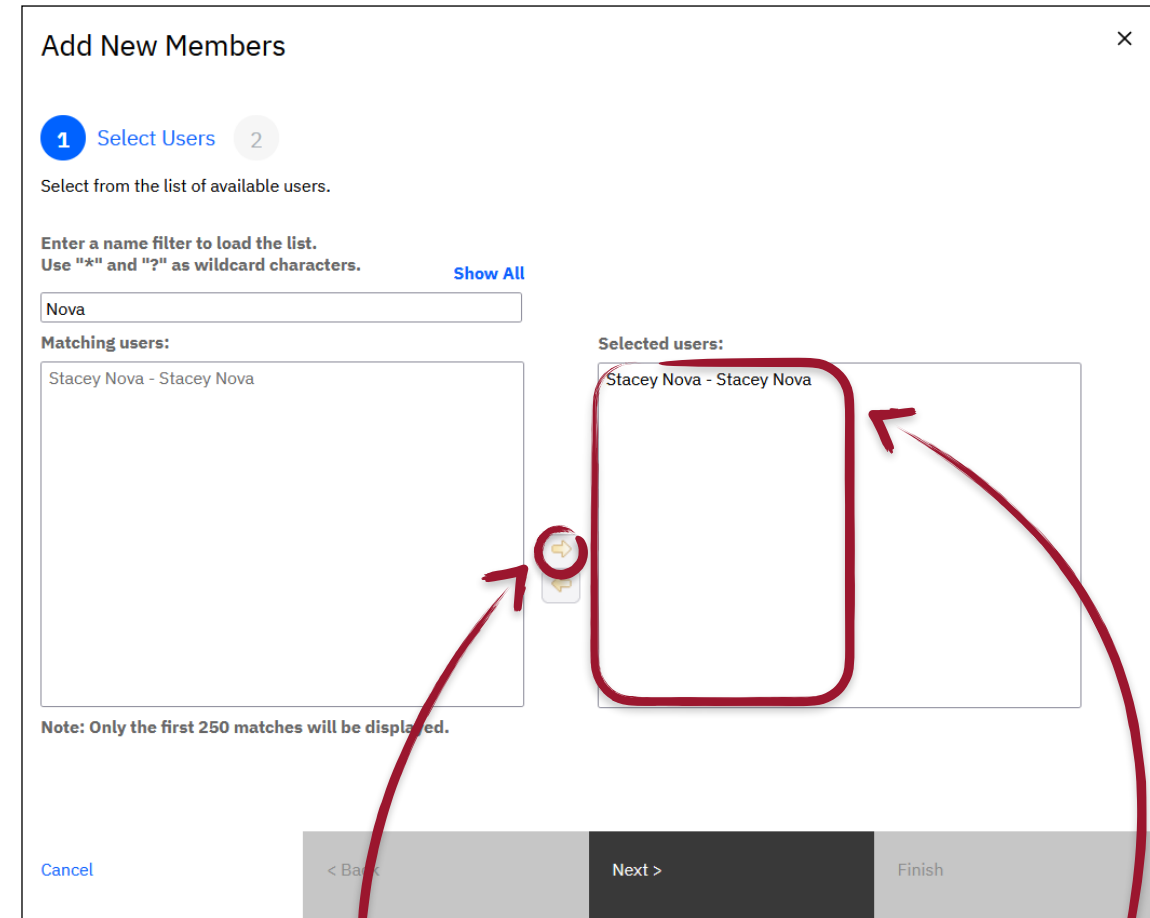
Stacey Nova - Stacey Nova

Selected users:

Note: Only the first 250 matches will be displayed.

Cancel < Back Next > Finish

2. After pressing **Enter**, the **matching users** will be displayed in the list on the **left**.



**Add New Members**

1 Select Users 2

Select from the list of available users.

Enter a name filter to load the list.  
Use "\*" and "?" as wildcard characters. [Show All](#)

Nova

Matching users:

Stacey Nova - Stacey Nova

Selected users:

Stacey Nova - Stacey Nova

Note: Only the first 250 matches will be displayed.

Cancel < Back Next > Finish

3. Then you click on the **arrow pointing right** to add the user into the **list of selected users** on the right side. You can repeat this with any number of users (To remove a user from the list of selected users on the right side, click on the arrow pointing left behind the name).

4. Click on the **Next** button, to go to the second step: **Assign roles**.



Cancel < Back Next > Finish

Add New Members

1

2 Select Roles

Assign the process roles for the selected users.

Available Roles:

Administrator

Author

Commenter

Configuration Lead

Selected Roles:

Description:

Note:

The ordering of a user's assigned roles reflects their relative priority. When behavior is configured for multiple roles, the process framework will execute the behavior associated with the user's highest priority role. Priority doesn't affect permissions; the process runtime will allow the user to perform actions granted to any of their assigned roles.

Cancel

< Back

Next >

Finish

5. The **available roles** are listed in the list on the **left**. Select one or more entries and then click the **arrow pointing right** to add them to the **list of selected roles** on the right

Add New Members

1

2 Select Roles

Assign the process roles for the selected users.

Available Roles:

Administrator

Selected Roles:

Author

Commenter

Configuration Lead

Description:

Note:

The ordering of a user's assigned roles reflects their relative priority. When behavior is configured for multiple roles, the process framework will execute the behavior associated with the user's highest priority role. Priority doesn't affect permissions; the process runtime will allow the user to perform actions granted to any of their assigned roles.

Cancel

< Back

Next >

Finish

6. Finally, click on the **Finish** button, to exit the dialog.

Cancel

< Back

Next >

Finish

Back in the **Members** section, the users and their assigned roles are displayed.

| Members                                                                                                                                                                                                                                                          |             | Add...                                                                                     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------------------------------------------------------------------------------------|
| Roles grant users permissions and determine the preconditions and follow-up actions that run. Roles assigned here are inherited in all team areas within this project area. All users in the repository have the Everyone role whether they are a member or not. |             |                                                                                            |
| Members Per Page:                                                                                                                                                                                                                                                | 5           | Previous   1 - 1 of 1   Next                                                               |
| No members selected                                                                                                                                                                                                                                              |             |                                                                                            |
| Search...                                                                                                                                                                                                                                                        |             |                                                                                            |
|                                                                                                                                                                                                                                                                  | Name        | Process Roles                                                                              |
| <input type="checkbox"/>                                                                                                                                                                                                                                         | Stacey Nova | Configuration Lead, Data Migration Administrator , Test Team Contributor, Test Team Member |

To make the changes in the project area (i.e. add members / assign roles) effective, click on the blue **Save** button in the top right corner.

Active Project Areas /

Active Cruise Control (QM)

Explore Project

Save

Overview

Overview

Timelines

Roles

Permissions

Details

Preview

Team Area Hierarchy

Active Cruise Control (QM)

To work with the project artifacts, click on **Explore Project**.

Active Project Areas /

Active Cruise Control (QM)

Explore Project

Save

Overview

Overview

Timelines

Roles

Permissions

Details

Preview

Team Area Hierarchy

Active Cruise Control (QM)



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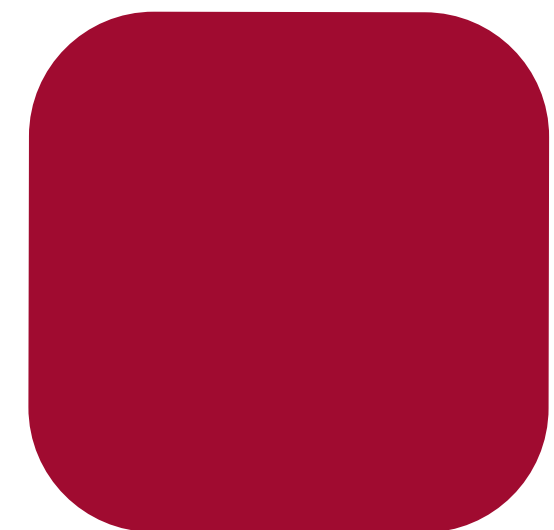
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Version 1.0



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