

# IBM ETM

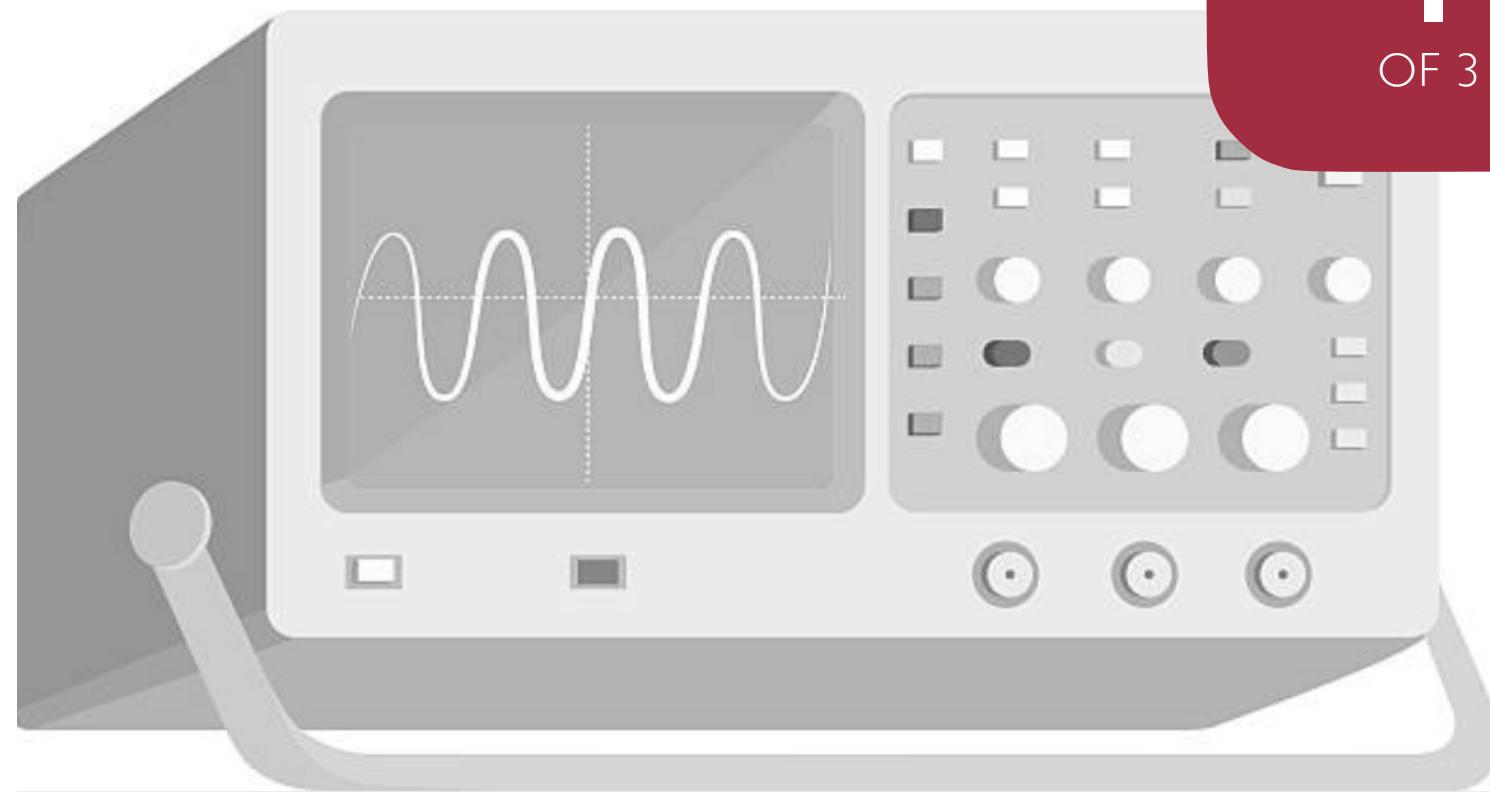
## Quick Start Guide

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  
1  
OF 3

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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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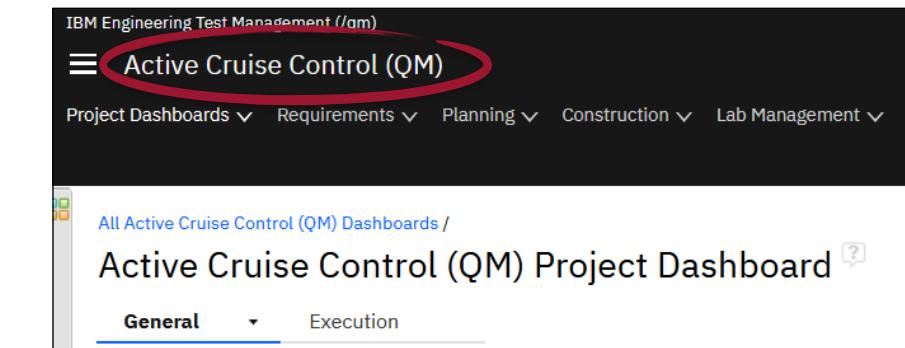
## 2 MOST IMPORTANT ETM TERMS

### 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**.

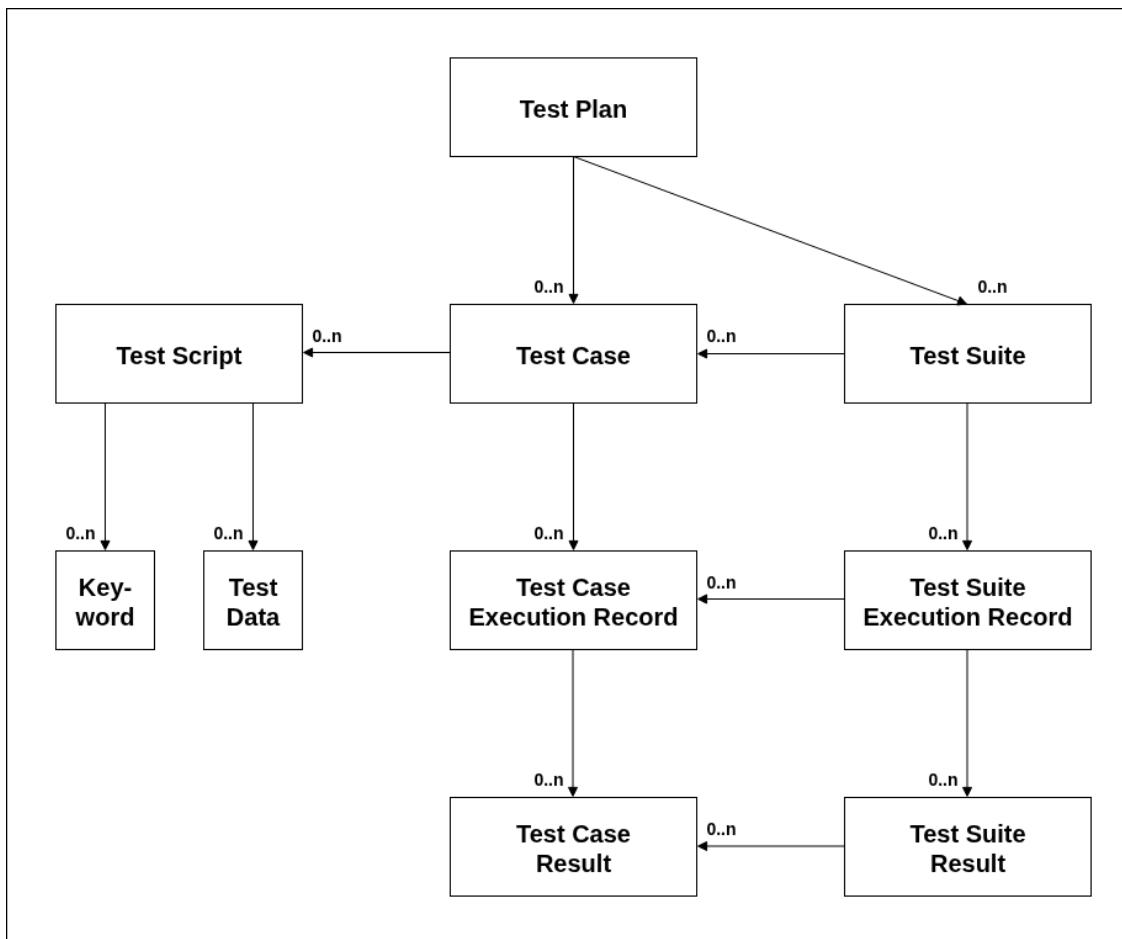
### Role Assignment

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.

## Test Artifacts

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

- Test Plan
- Test Case
- Test Script
- Keyword
- Test Data
- Test Case Execution Record
- Test Case Result
- Test Suite
- Test Suite Execution Record
- Test Suite Result



## Test Plan

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 groups sets of test cases, requirements etc. to be tested. It also defines the test environment, test schedules and other things. However it is possible to define and use test cases and test suites without a test plan.

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 Case

A **test case** defines the things that need to be validated to ensure that a system or function is working as expected. It shows **what** to test but it is not execution-ready on its own (this is done by a test case execution record).

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 Script

A **test script** contains the instructions for implementing a test case. It shows **how to** test and can be a manual script or a script where some or all instructions are automated.

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.

## Keyword

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.

## Test Data

**Test data** in ETM allows to perform data-driven testing. This means that a test script can be written once and then run multiple times with different data sets. Because test data is stored separately from the test script, it offers the flexibility to modify the test data without altering the test script and the same test data can be reused across multiple test scripts and users.

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

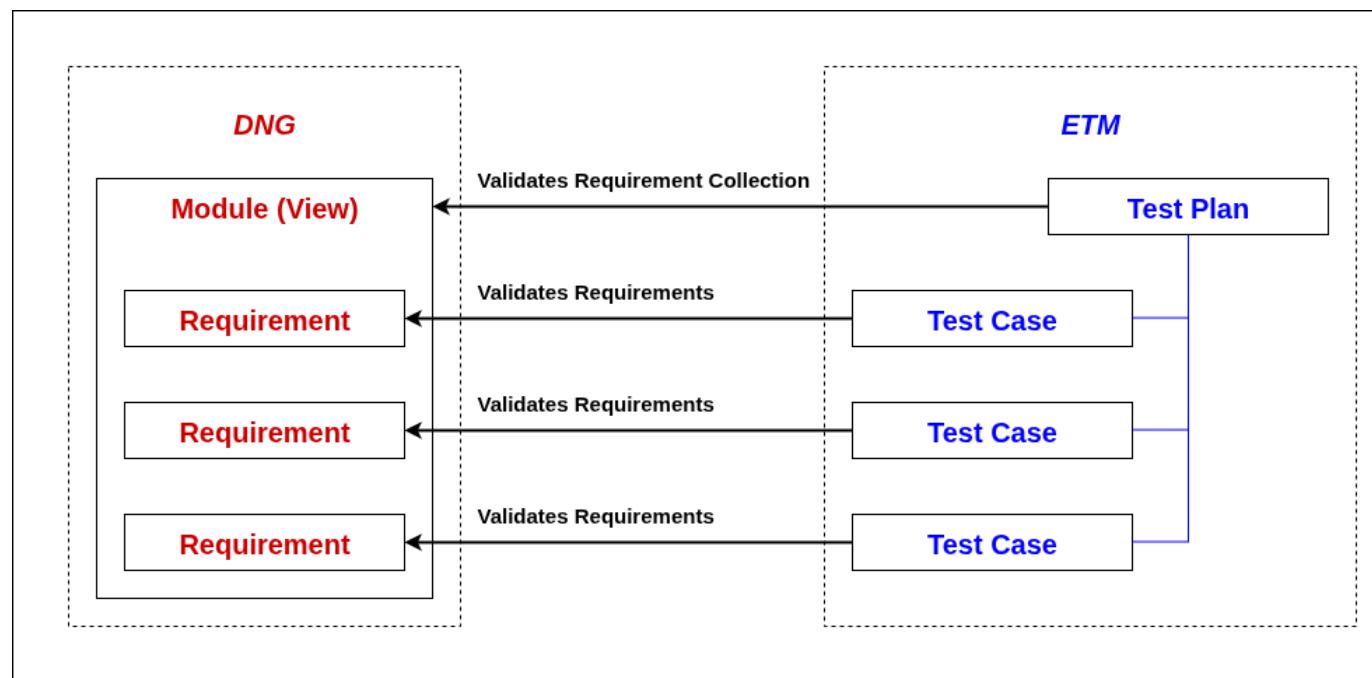
### Using ETM with DNG

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

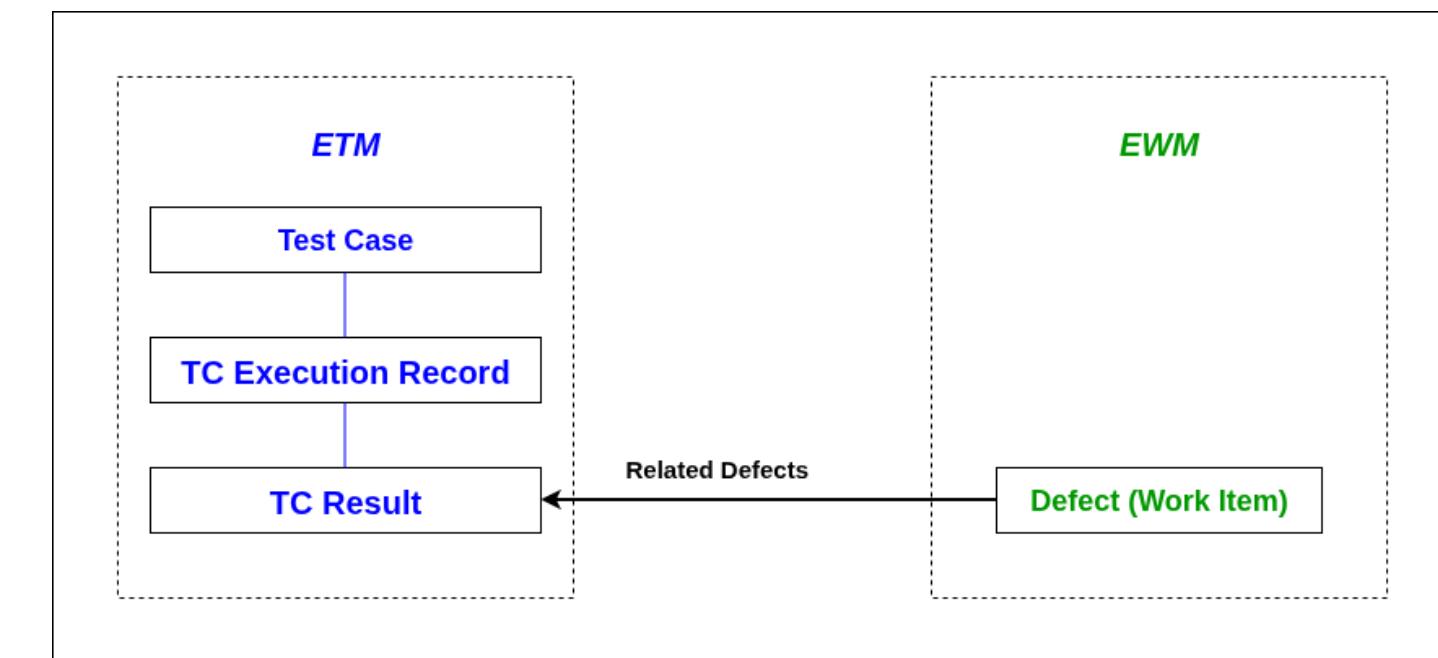
At any time during the test process, the user can submit a defect. For the defect management the tool IBM EWM (Engineering Workflow Management) is typically used.

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 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.

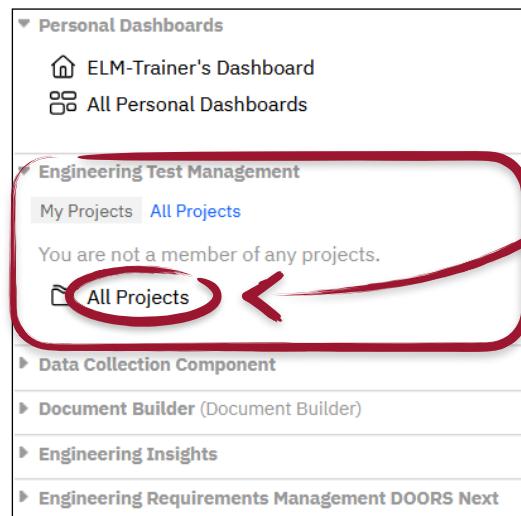
The most important of these are the following.



### 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.

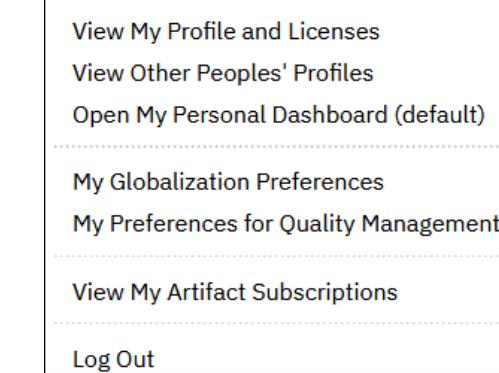
To get a list of **all** ETM projects, click on **All Projects** in the **Engineering Test Management** section.



### User Profile Menu

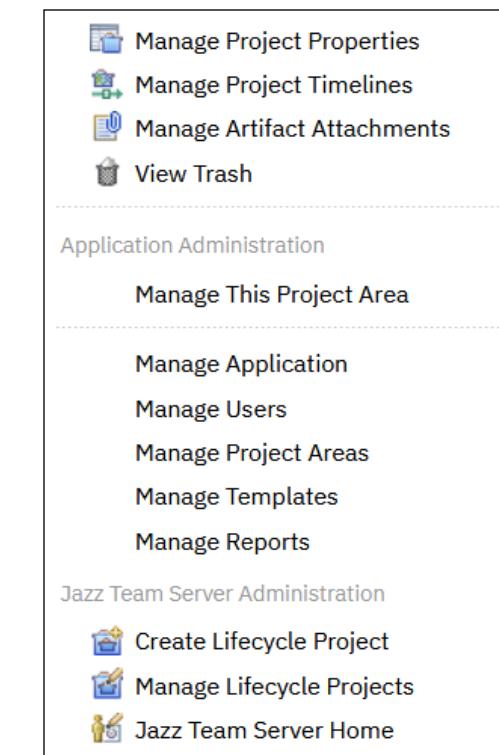
ELM-Trainer 

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**).



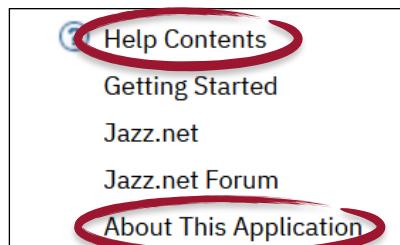
### Administration Menu

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.



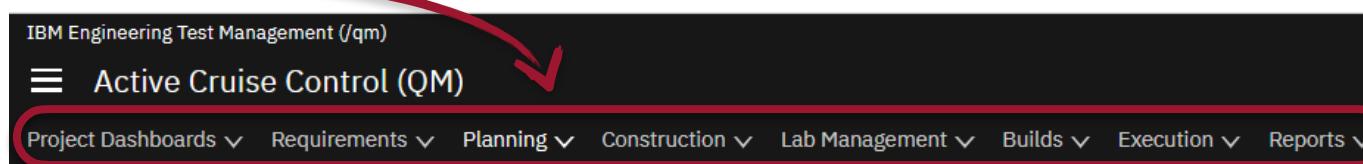
## Help Contents Menu

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

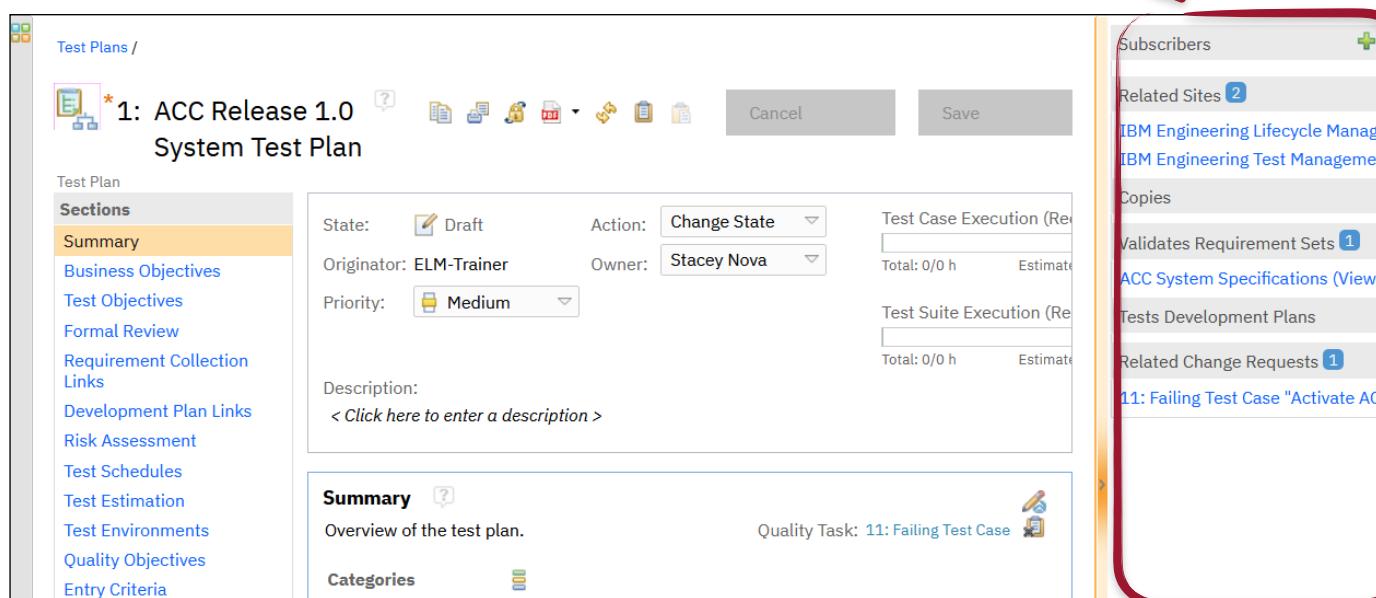
The **main menus** are located below the header line menus. These are explained in the following chapters.



## Right Sidebar

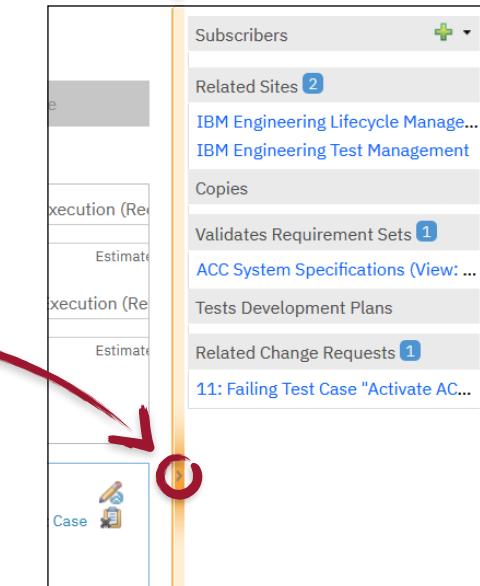
The **right sidebar** is present on most pages and provides access to various functions, including links. It allows users to manage and view related information within the context of the current selected artifact.

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.

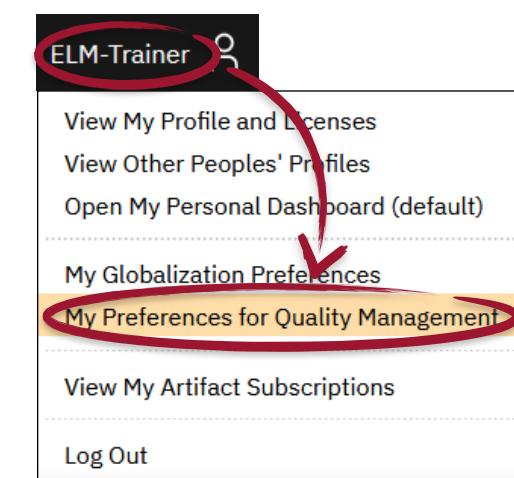
By **dragging** the slider, you can enlarge or reduce the size of the right sidebar.



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:

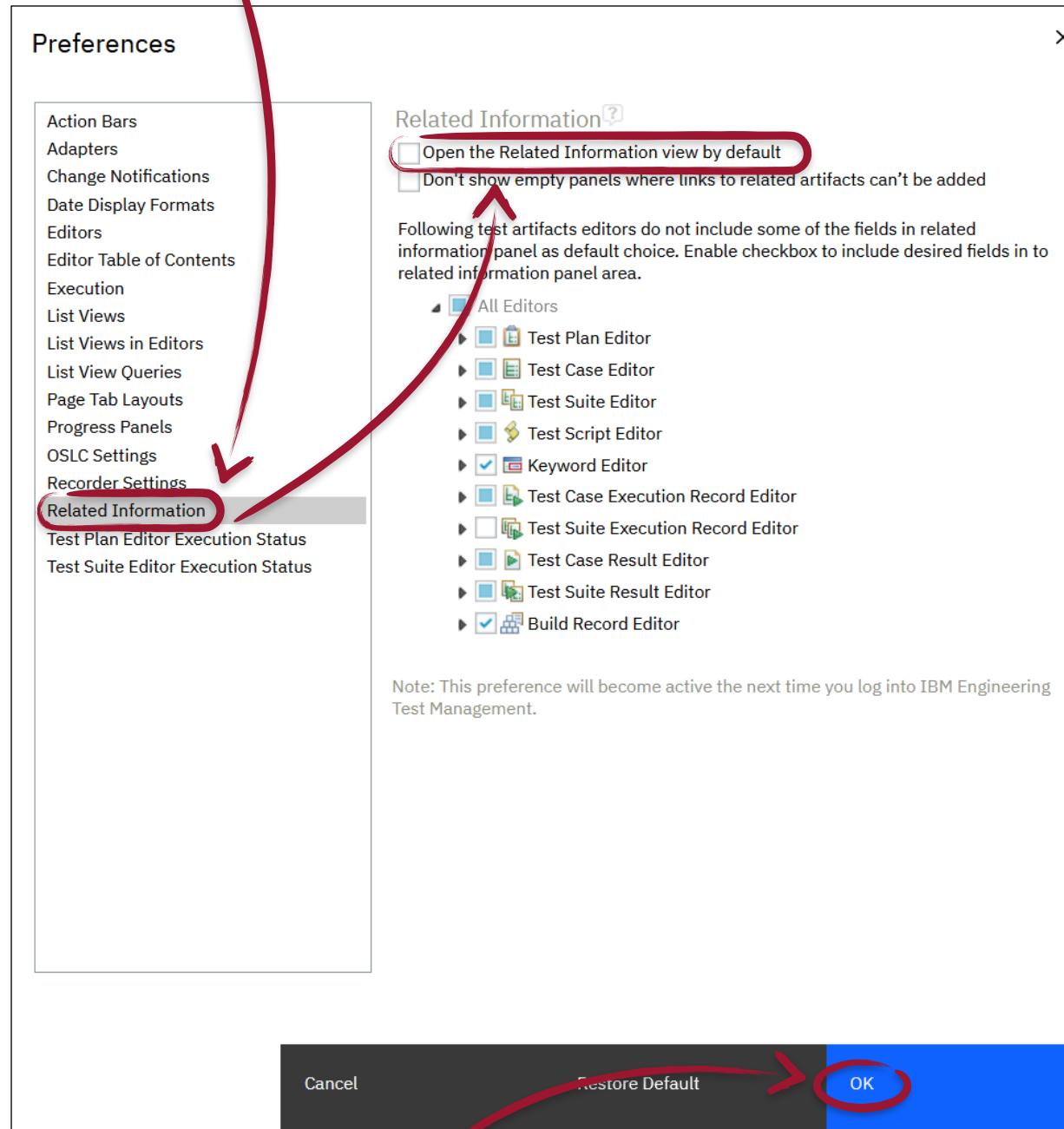
- Open the **User Profile Menu**.
- Select **My Preferences for Quality Management**.



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.

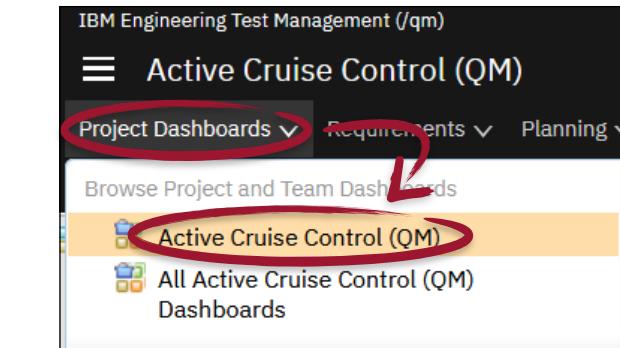


Finally, click **OK** to apply the changes.

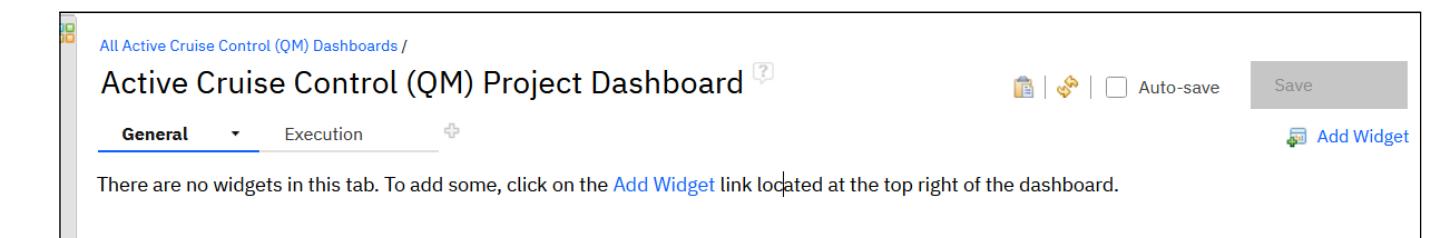
## Project Dashboard

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).

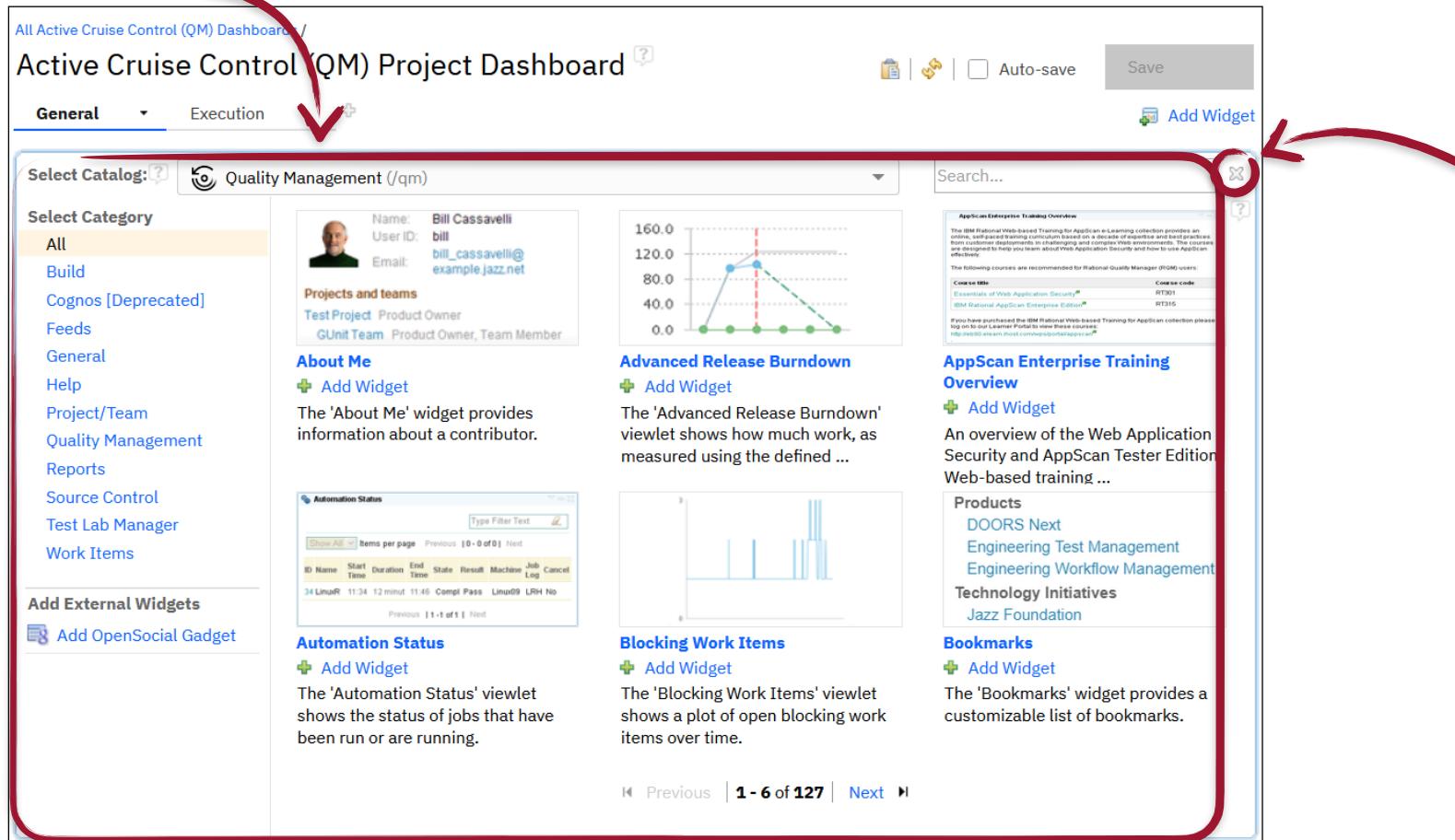


The following example shows how to add the **My Reviews** widget. This widget indicates where the logged-in user needs to perform **reviews** and **approvals**.

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.

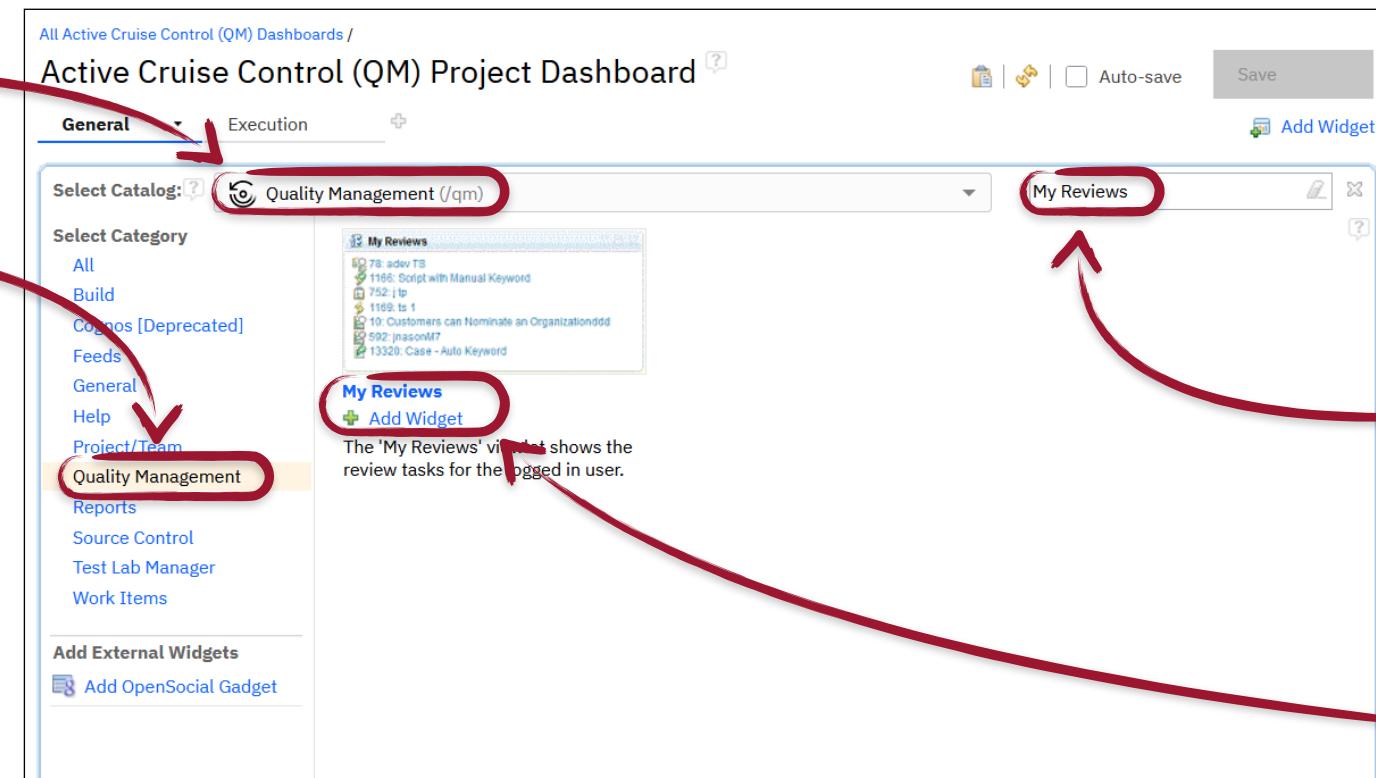


To **close** the catalog after adding a widget and **return** to the dashboard, click the cross icon in the upper right corner of the widget catalog.

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

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

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



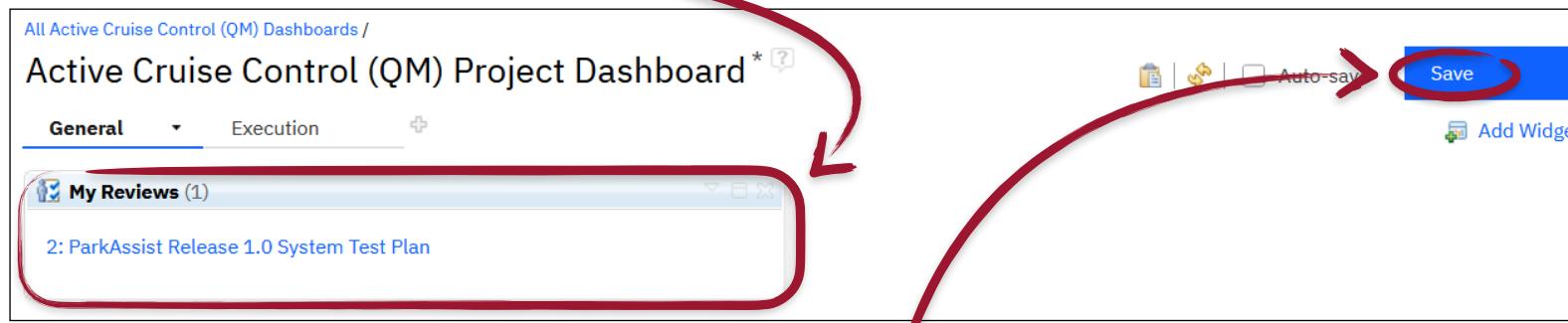
Thirdly, you can search for the widget in the **search field** by entering its name (or part of it). In the example: **My Reviews**.

Alternatively, you can browse through the individual pages of the catalog until you find the widget you are looking for.

◀ Previous | 1 - 6 of 127 | Next ▶

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.

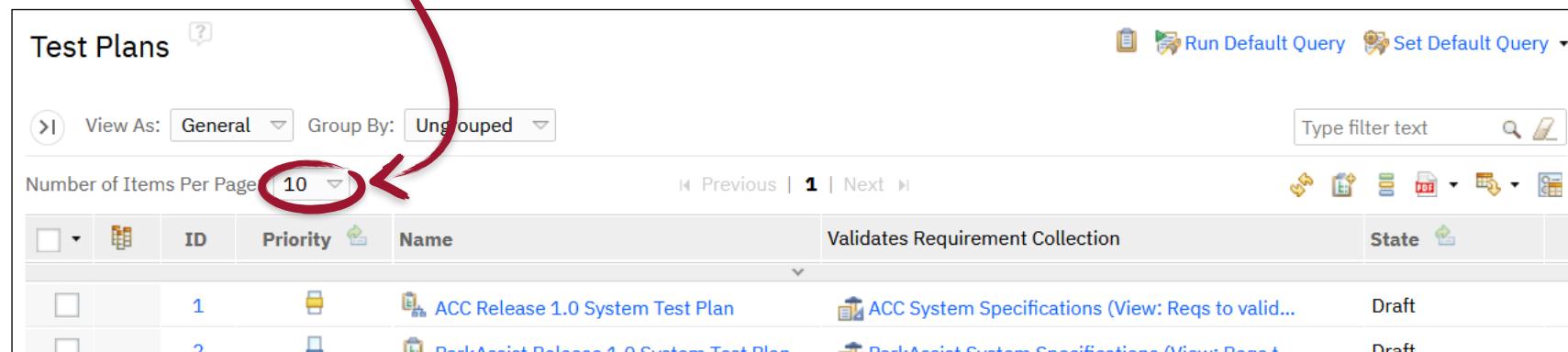
The artifacts in the list view can be filtered and sorted according to various criteria, and the columns can be arranged, shown or hidden as desired. The filters and the column ordering can be saved in queries. Furthermore, the (filtered) list view can be exported as a PDF or CSV file.



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**).



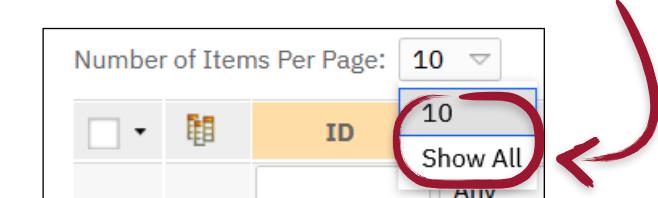
**Test Plans**

View As: General Group By: Ungrouped

Number of Items Per Page: 10

1 Previous | 1 | Next 2

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



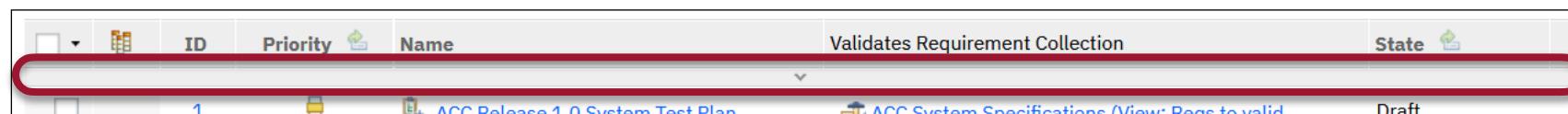
Number of Items Per Page: 10

1 Previous | 1 | Next 2

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

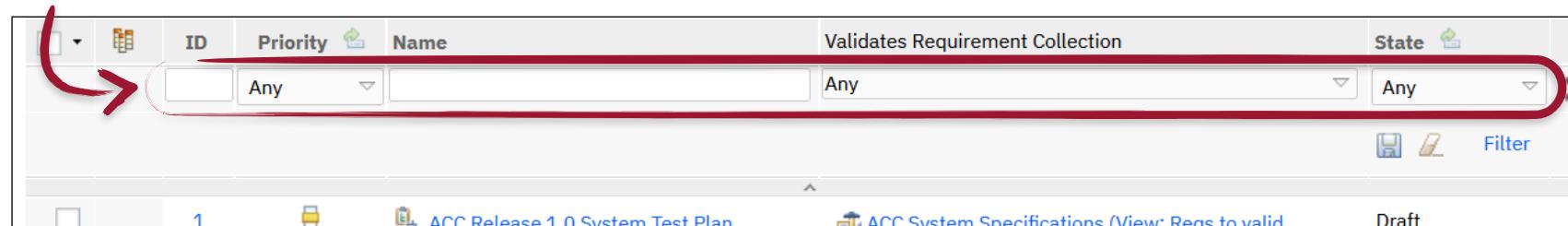
### Inline Filter

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	
2	Park Assist Release 1.0 System Test Plan	Park Assist System Specifications (View: Reqs to valid...)	Draft	

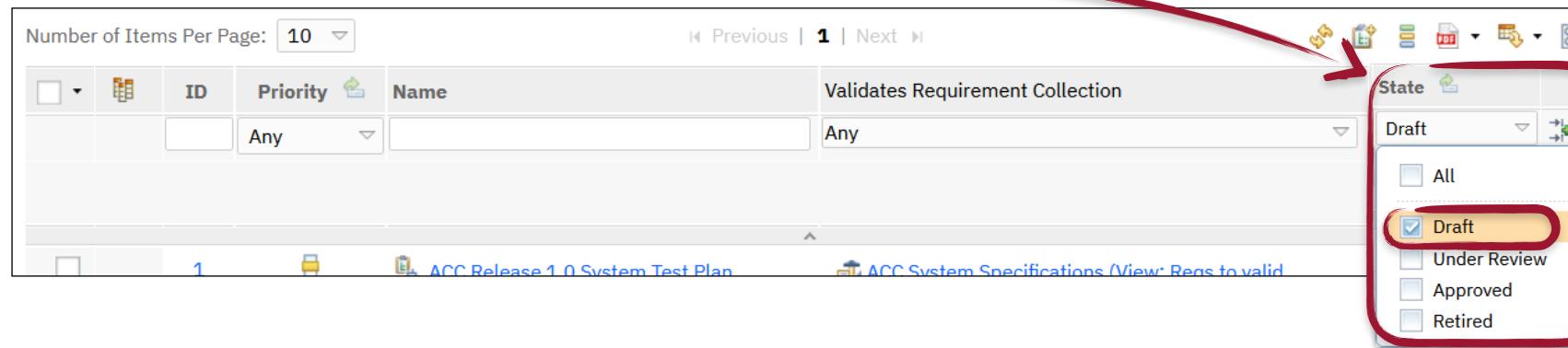
Filters for all columns will then appear.



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

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 |

Validates Requirement Collection

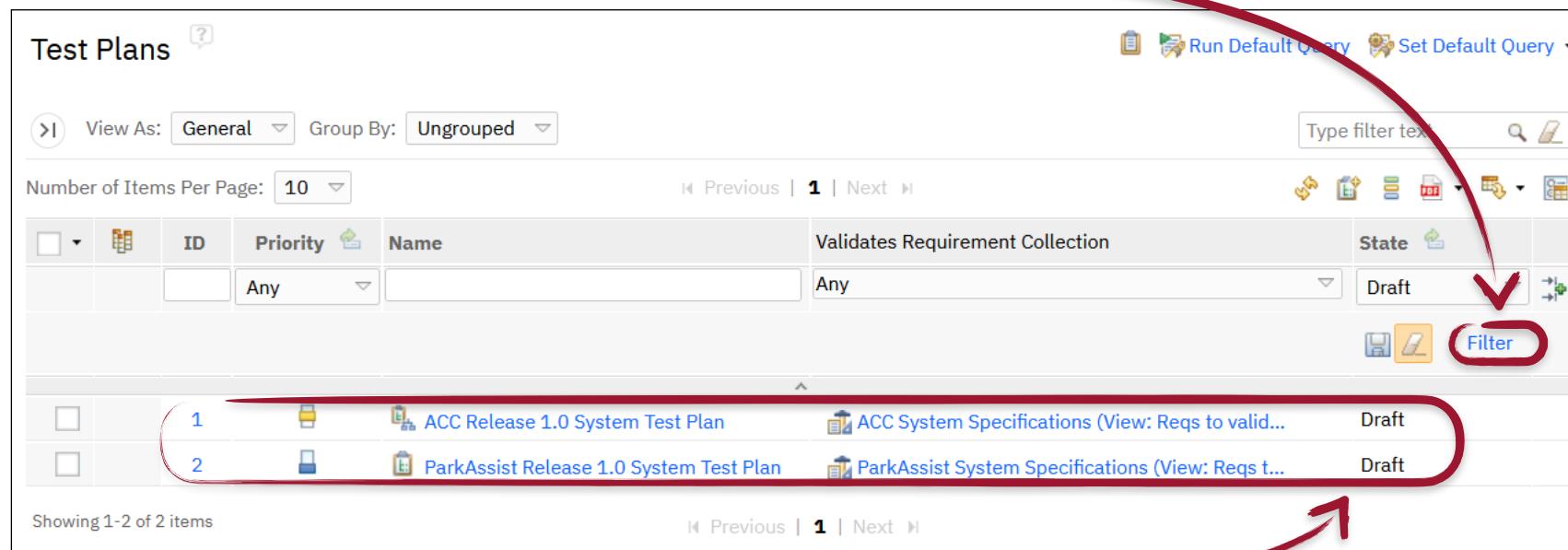
State

Draft

- All
- Draft
- Under Review
- Approved
- Retired

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

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 | Type filter text: | Filter

Number of Items Per Page: 10 | Previous | 1 | Next |

Validates Requirement Collection | State: Draft | Filter

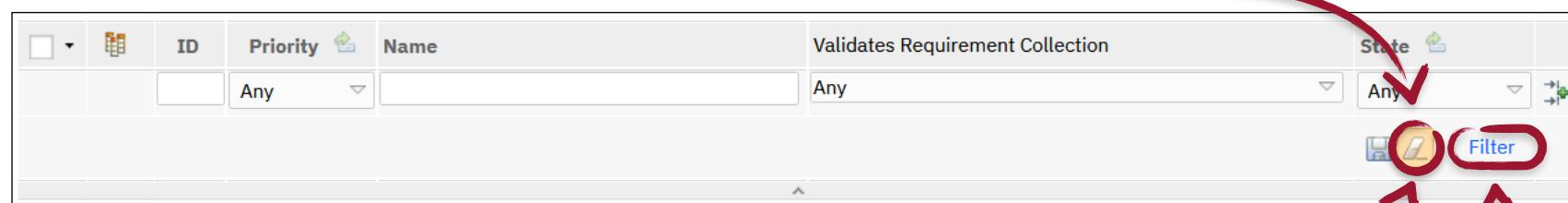
1 ACC Release 1.0 System Test Plan ACC System Specifications (View: Reqs to valid... | Draft

2 ParkAssist Release 1.0 System Test Plan ParkAssist System Specifications (View: Reqs t... | Draft

Showing 1-2 of 2 items | Previous | 1 | Next |

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**.



Number of Items Per Page: 10 | Previous | 1 | Next |

Validates Requirement Collection

State

Any

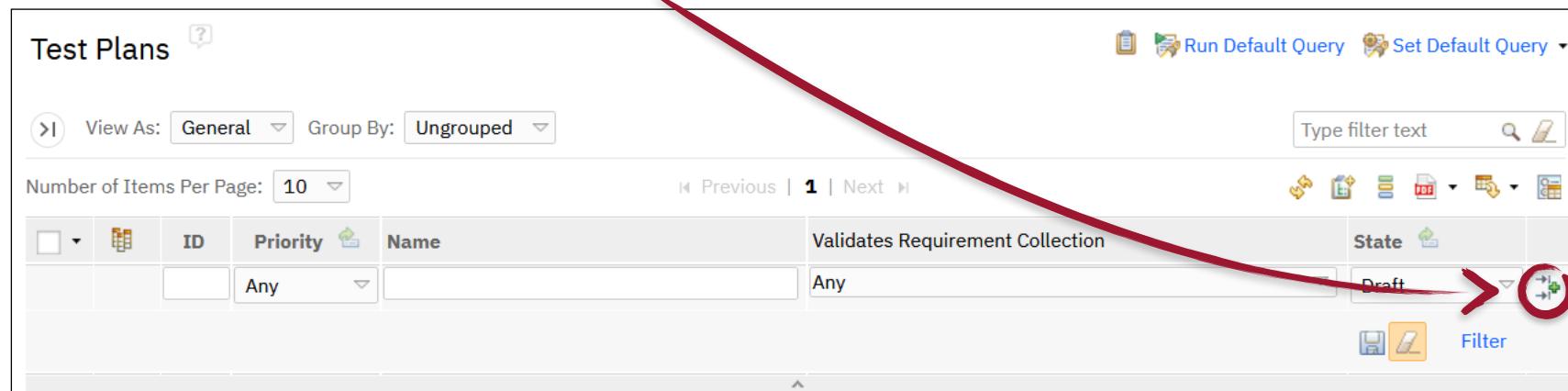
Filter

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

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

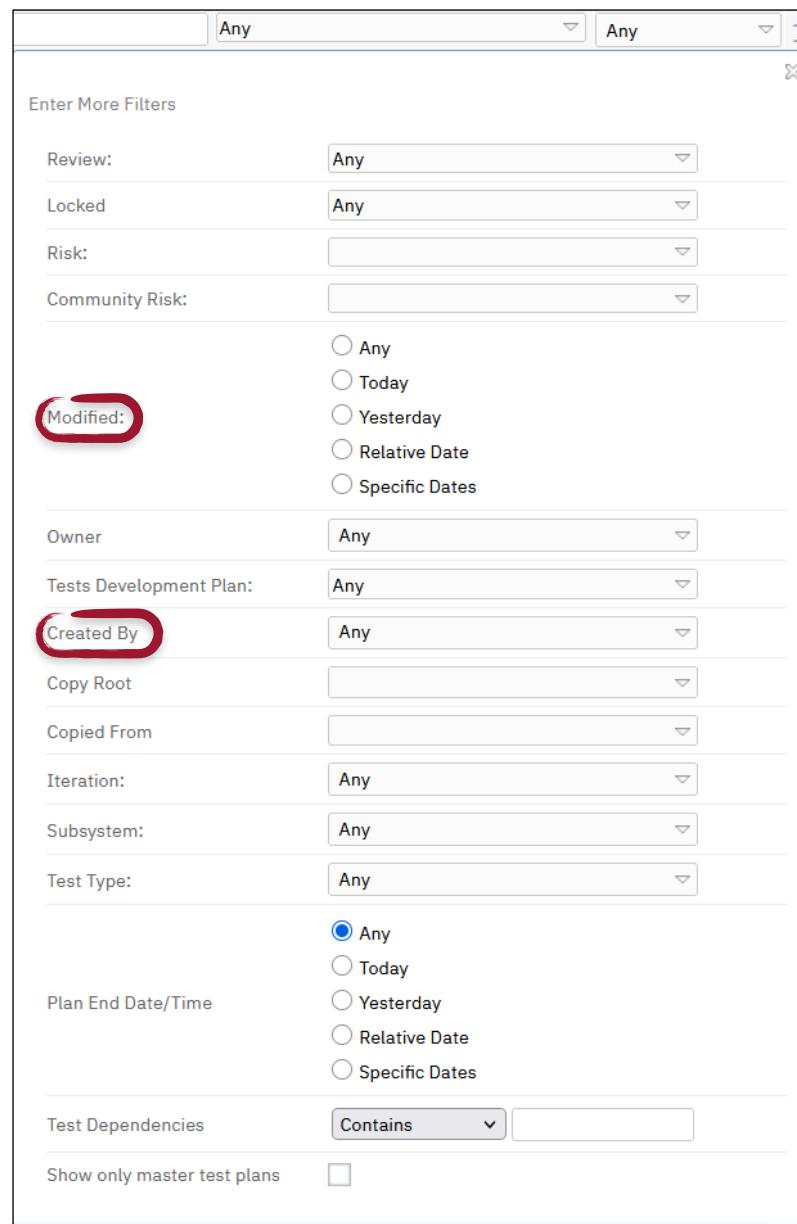
## More Filters

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 'View As: General' and 'Group By: Ungrouped'. Below that is a 'Number of Items Per Page: 10' dropdown and navigation buttons for 'Previous', '1', and 'Next'. A 'Type filter text' search bar is followed by a set of icons for filtering. The main area shows a table with columns: ID, Priority, Name, Validates Requirement Collection, and State. The 'State' column has a dropdown set to 'Draft'. A red arrow points from the 'More Filters' icon in the toolbar to a red circle on the 'Modified' dropdown in the 'Enter More Filters' dialog box.

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



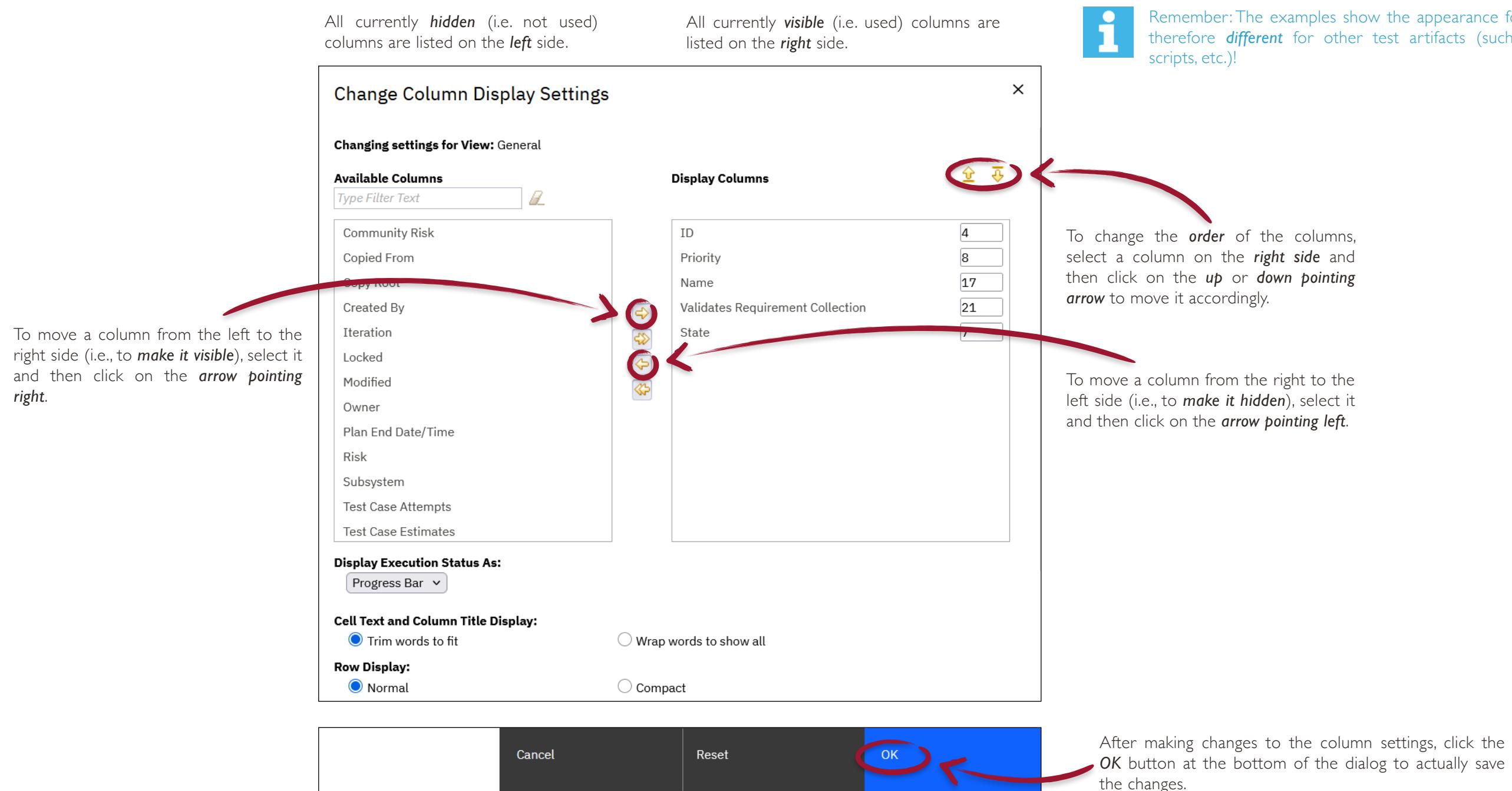
The screenshot shows the 'Enter More Filters' dialog box. It contains various filter fields: Review (Any), Locked (Any), Risk (Any), Community Risk (Any), Modified (Any, Today, Yesterday, Relative Date, Specific Dates), Owner (Any), Tests Development Plan (Any), Created By (Any), Copy Root (Any), Copied From (Any), Iteration (Any), Subsystem (Any), Test Type (Any, Any, Today, Yesterday, Relative Date, Specific Dates), Plan End Date/Time (Any, Today, Yesterday, Relative Date, Specific Dates), Test Dependencies (Contains, Any), and Show only master test plans (checkbox). The 'Modified' and 'Created By' dropdowns are circled in red.

## 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:

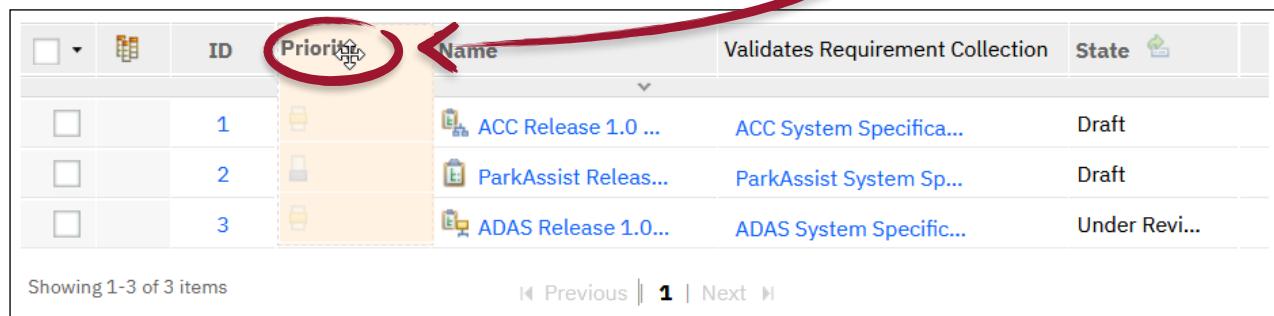


## Reorder Columns by drag and drop

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):

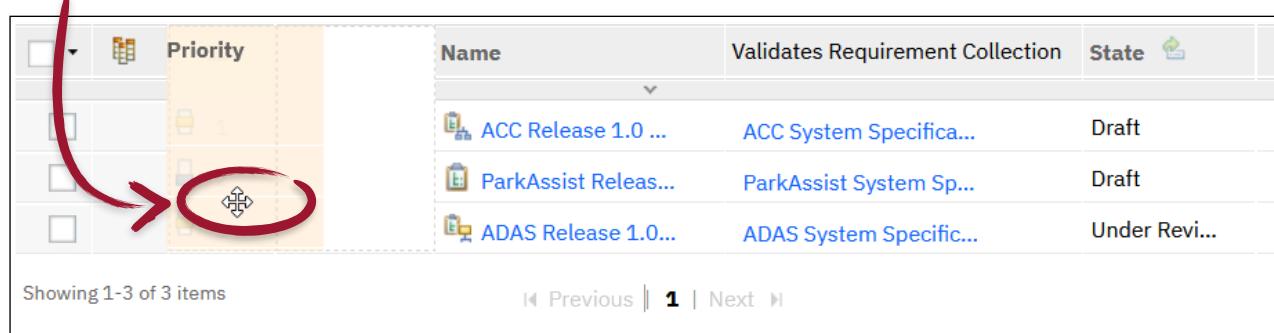
- Move the mouse pointer over the column you want to move (in the example column **Priority**).
- Press and hold the mouse button. The mouse pointer changes to a **cross**, and the selected column is only dimly displayed.



	ID	Priority	Name	Validates Requirement Collection	State
	1	ACC Release 1.0 ...	ACC System Specifica...	Draft	
	2	ParkAssist Releas...	ParkAssist System Sp...	Draft	
	3	ADAS Release 1.0...	ADAS System Specific...	Under Revi...	

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

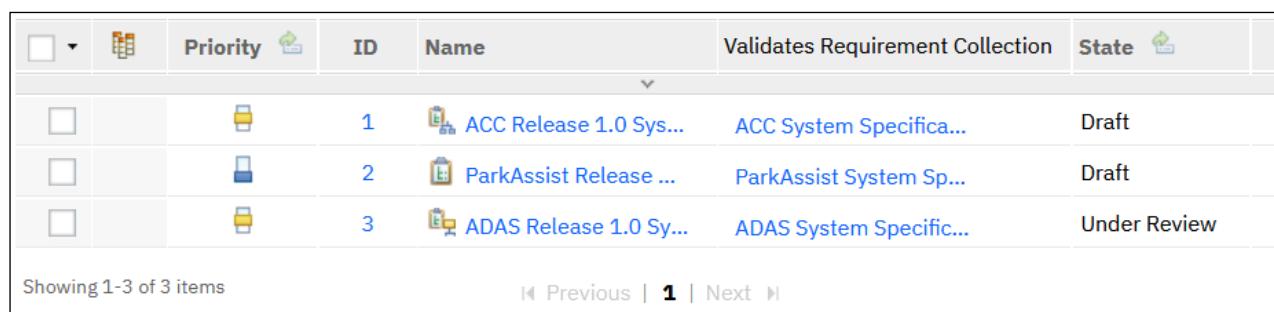
- Drag the mouse pointer to the position you want to move the selected column *before* (in the example column **ID**).



	Priority	ID	Name	Validates Requirement Collection	State
	ACC Release 1.0 ...	1	ACC System Specifica...	Draft	
	ParkAssist Releas...	2	ParkAssist System Sp...	Draft	
	ADAS Release 1.0...	3	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
	ACC Release 1.0 Sys...	1	ACC System Specifica...	Draft	
	ParkAssist Release ...	2	ParkAssist System Sp...	Draft	
	ADAS Release 1.0 Sys...	3	ADAS System Specific...	Under Review	

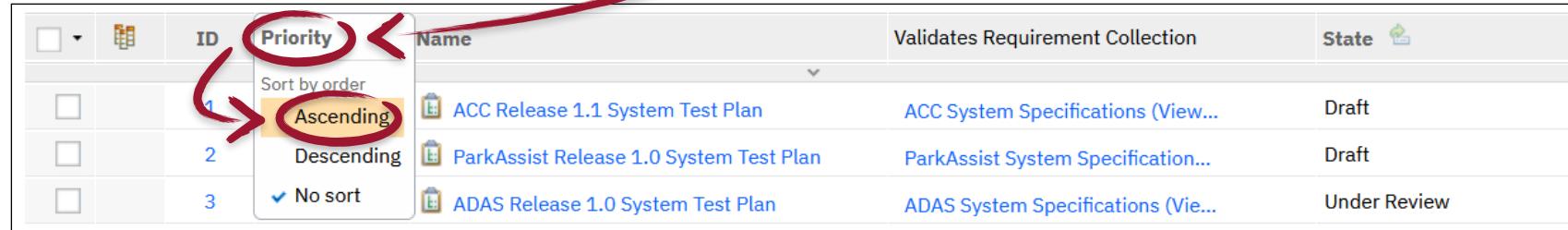
Showing 1-3 of 3 items    Previous | 1 | Next

## 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**.

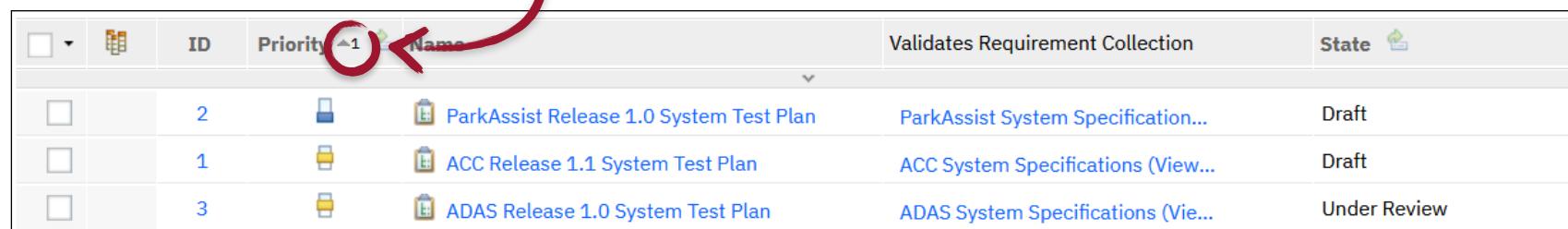


ID	Priority	Name	Validates Requirement Collection	State
	1	ACC Release 1.1 System Test Plan	ACC System Specifications (View...)	Draft
	2	ParkAssist Release 1.0 System Test Plan	ParkAssist System Specification...	Draft
	3	ADAS Release 1.0 System Test Plan	ADAS System Specifications (Vie...	Under Review



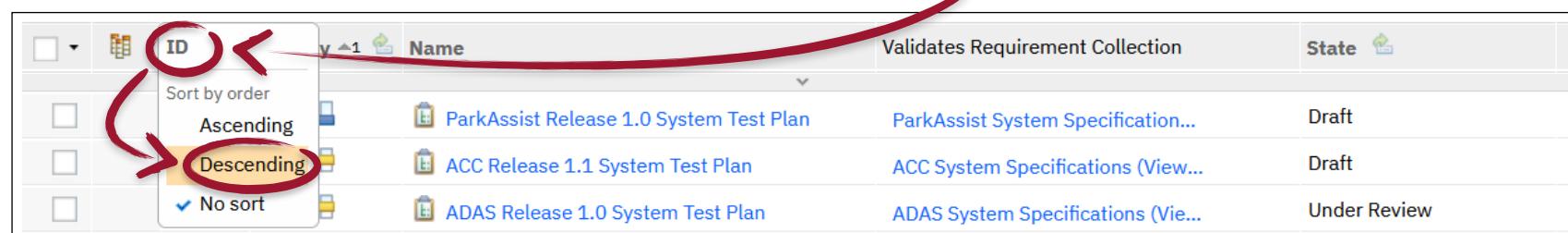
Sorting is only possible for columns with **bold** column headers, i.e., not for links (like **Validates Requirement Collection** etc.), for example.

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	Priority	Name	Validates Requirement Collection	State
	2	ParkAssist Release 1.0 System Test Plan	ParkAssist System Specification...	Draft
	1	ACC Release 1.1 System Test Plan	ACC System Specifications (View...)	Draft
	3	ADAS Release 1.0 System Test Plan	ADAS System Specifications (Vie...	Under Review

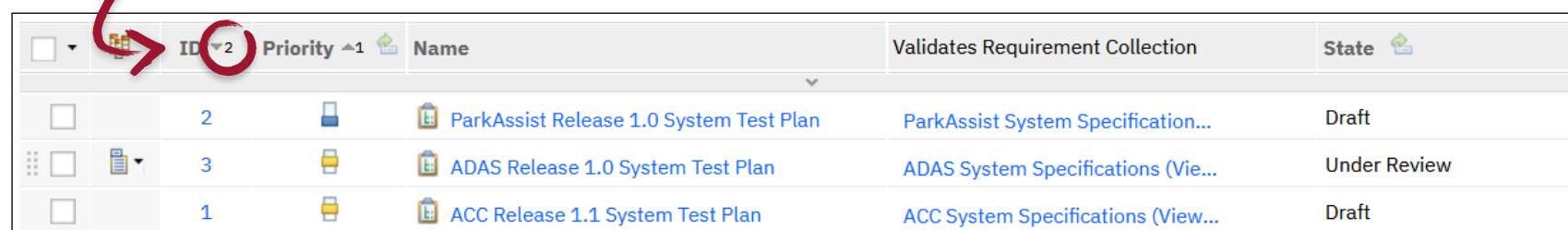
Additionally, you can sort by additional columns. Then, rows of equal **Priority** according to the first sorting criterion are sorted according to this second criterion. In the example, rows with the same **Priority** should be sorted in **descending** order by **ID**.



ID	Priority	Name	Validates Requirement Collection	State
	1	ACC Release 1.1 System Test Plan	ACC System Specifications (View...)	Draft
	2	ParkAssist Release 1.0 System Test Plan	ParkAssist System Specification...	Draft
	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.



ID	Priority	Name	Validates Requirement Collection	State
	2	ParkAssist Release 1.0 System Test Plan	ParkAssist System Specification...	Draft
	3	ADAS Release 1.0 System Test Plan	ADAS System Specifications (Vie...	Under Review
	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 screenshot of the 'Test Plans' query interface. The interface includes a toolbar with 'Run Default Query' and 'Set Default Query' buttons, a search bar, and a toolbar with various icons. A red arrow points from the 'Save' icon in the toolbar to the 'Save Query' dialog box. The main area shows a table with columns 'ID', 'Priority', and 'Name', and a filter section for 'State' set to 'Draft'.

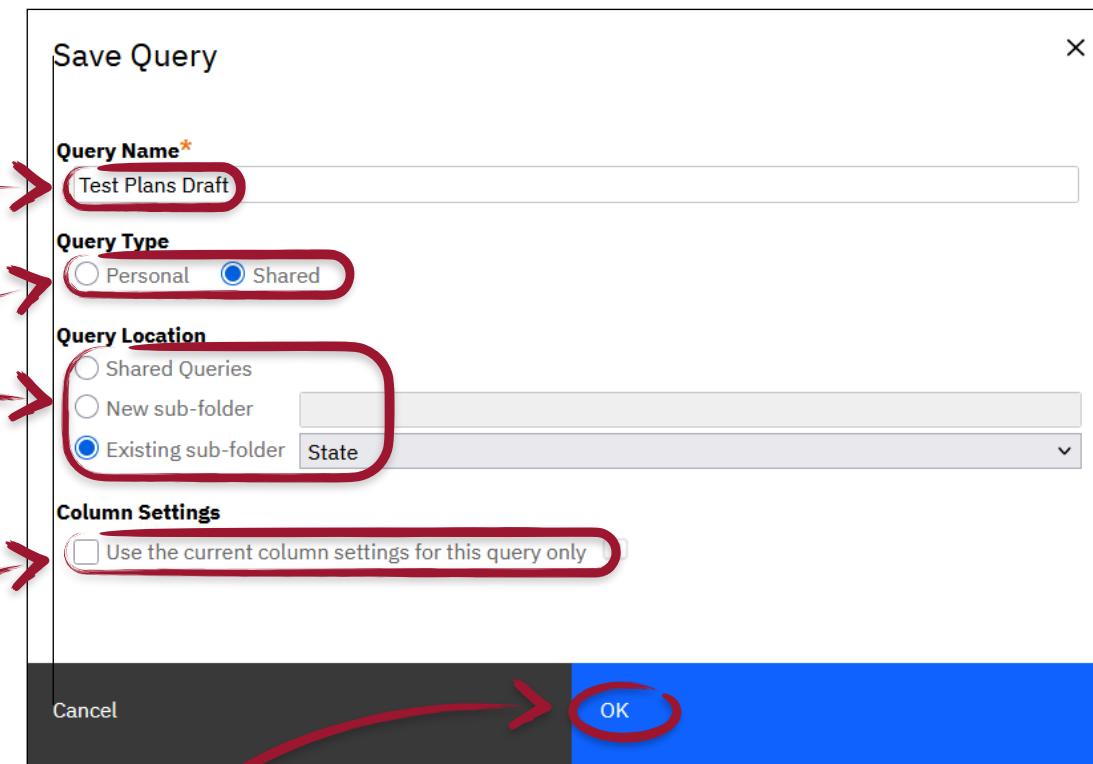
A **Save Query** dialog opens:

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).

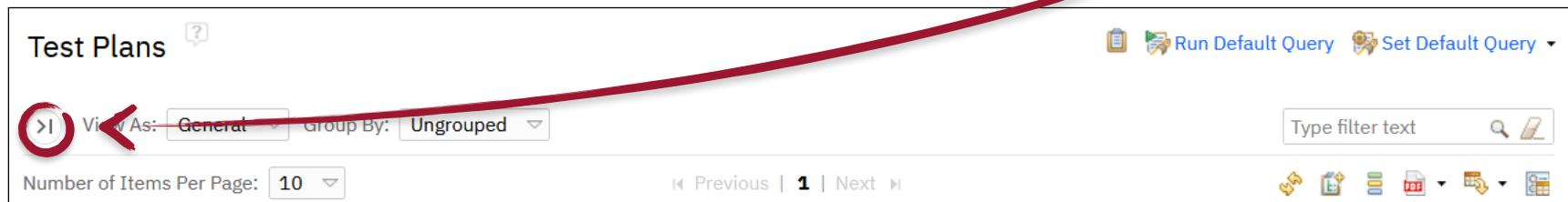
The field **Query Location** specifies the *location* where the query is **saved**. It can be either directly as the topmost entry (**Shared Queries**) or within a folder that is either newly created (**New sub-folder**) or already exists (**Existing sub-folder**). In this example, the new query should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

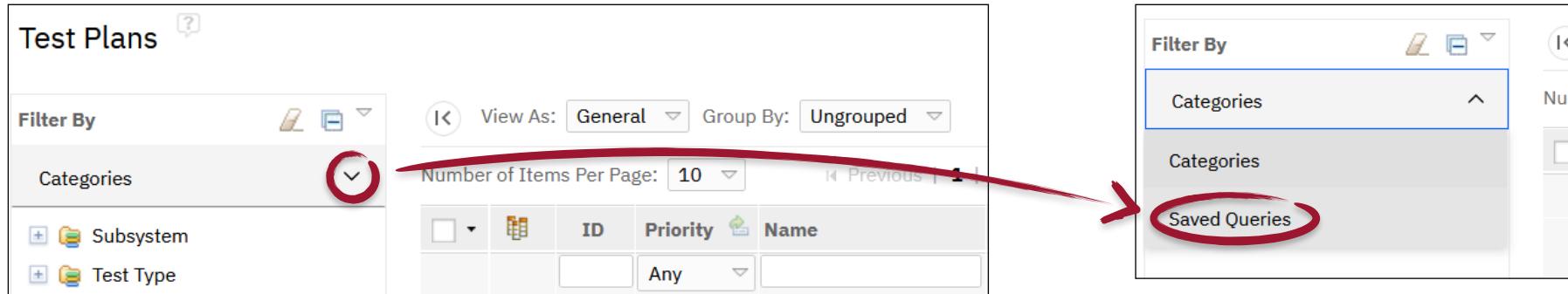


Click on **OK** to actually create the query.

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

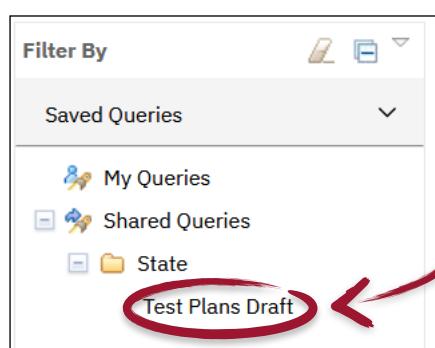


In the Filter sidebar, **Saved Queries** may need to be selected below **Filter by** (instead of **Categories** as shown in the picture below).



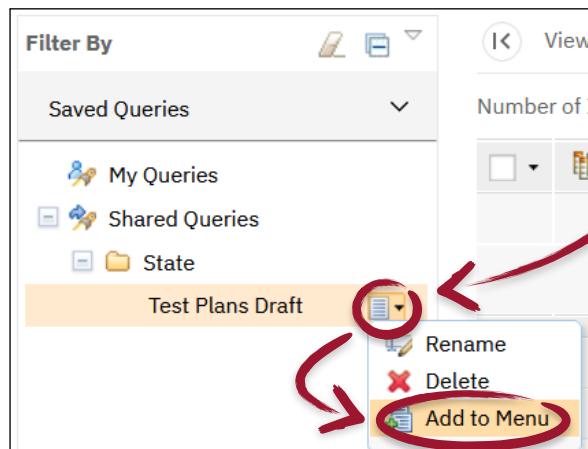
Now the saved queries are visible in two sections **My Queries** (i.e. personal queries) and **Shared Queries**.

The query from the example (**Test Plans Draft**) was saved under **Shared Queries** in the sub-folder **State**.

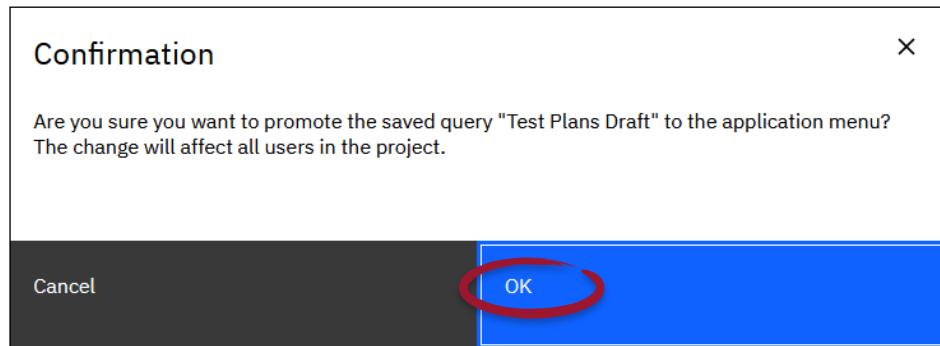


It is possible to set a query as an **entry** in the **main menu**. To do this,

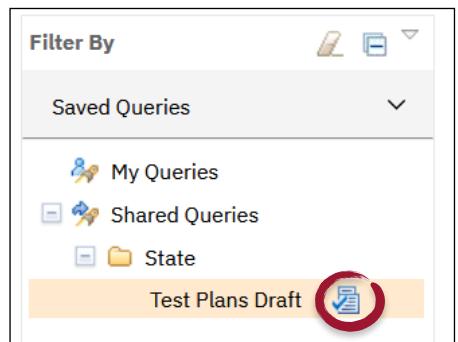
- Select the query in the filter sidebar, which will display a **context menu icon**.
- Then click on this icon and select **Add to Menu**.



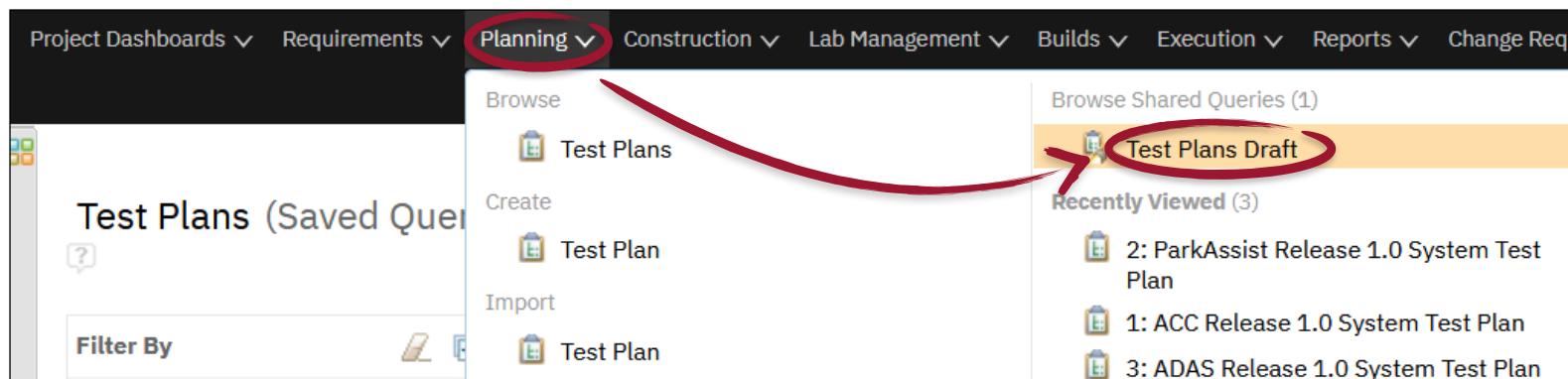
A **confirmation** dialog will appear where you click **OK**.



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

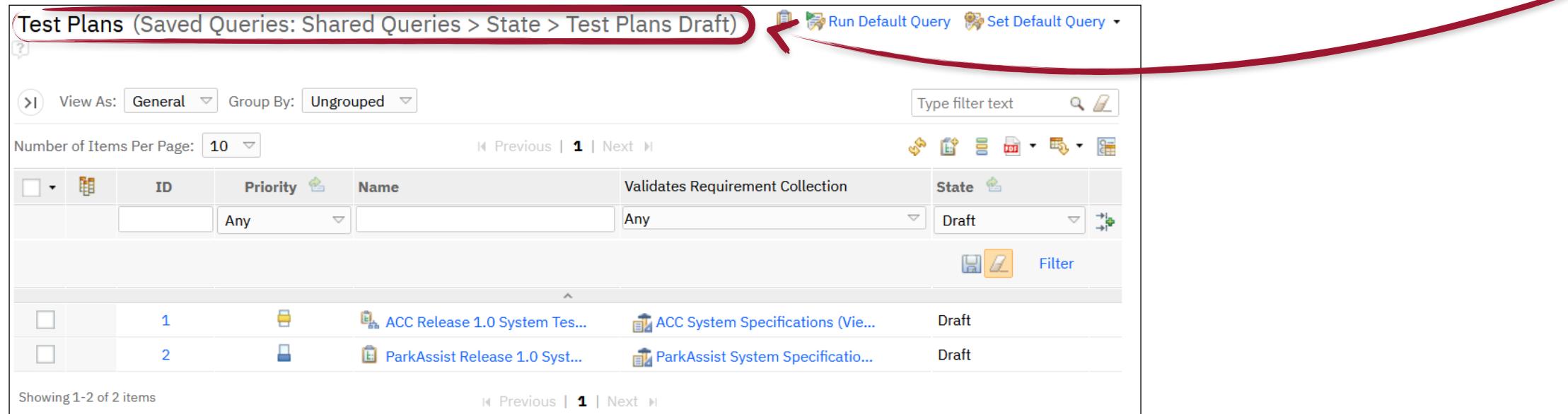


Additionally, the query is now visible as a **main menu** entry.



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

Previous | 1 | Next

ID Priority Name Validates Requirement Collection State

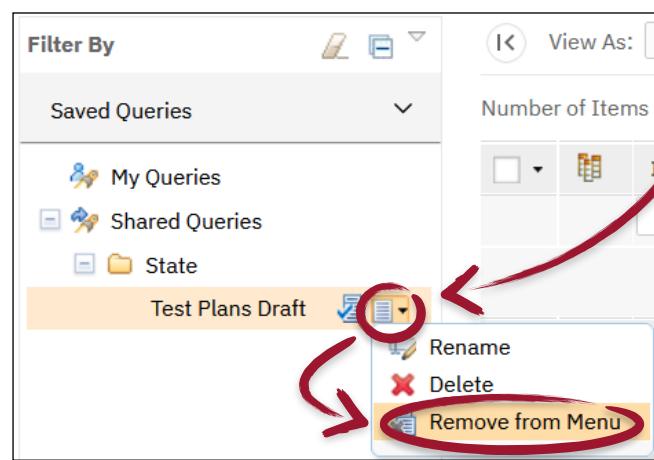
1 ACC Release 1.0 System Tes... ACC System Specifications (Vie... Draft

2 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

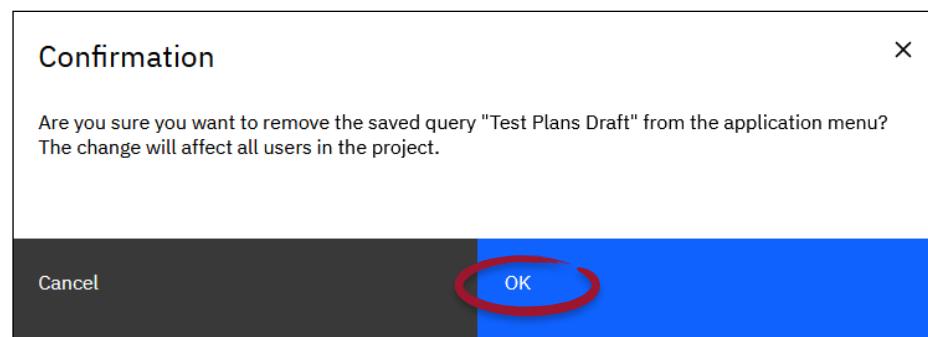
Test Plans Draft

Rename

Delete

Remove from Menu

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

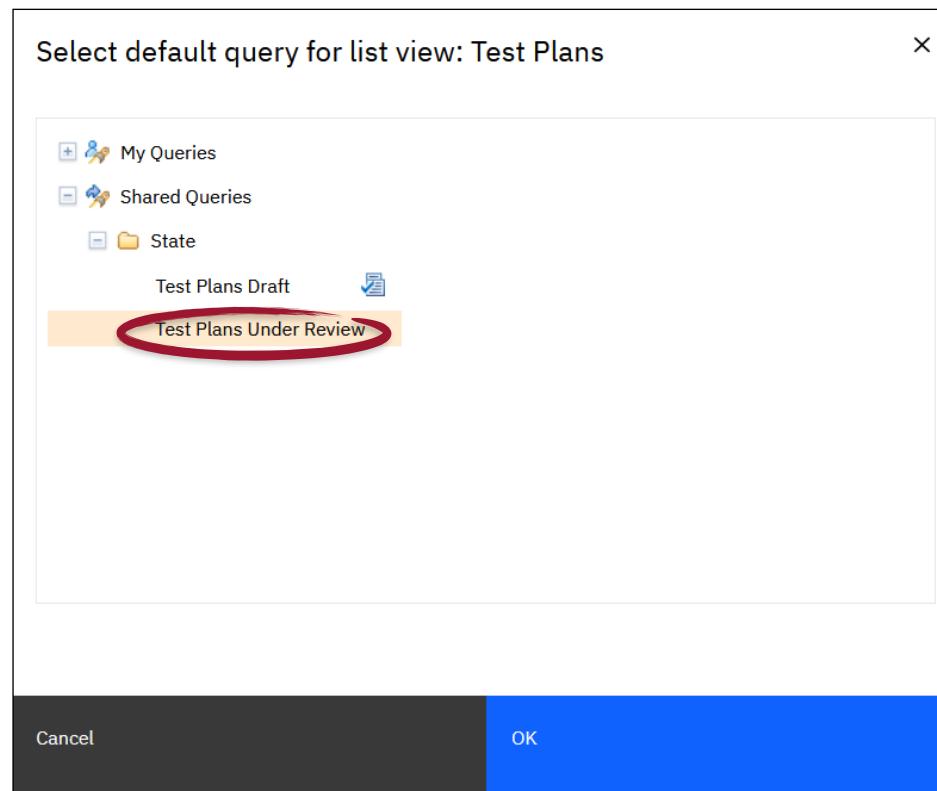


To define the default query:

- 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*).

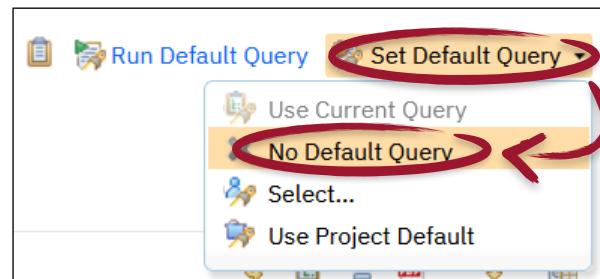


By **hovering** over **Run Default Query** the information about the query can be displayed.



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.

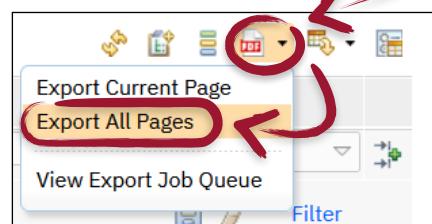
## Export List Views

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

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

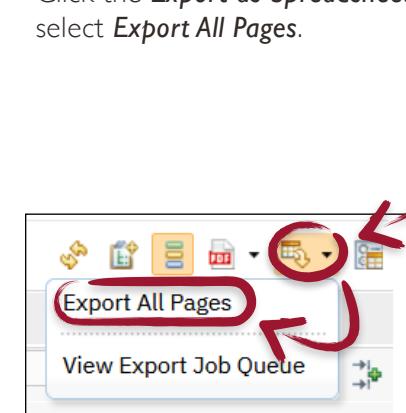
Click the **Export PDF** icon and then select either

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

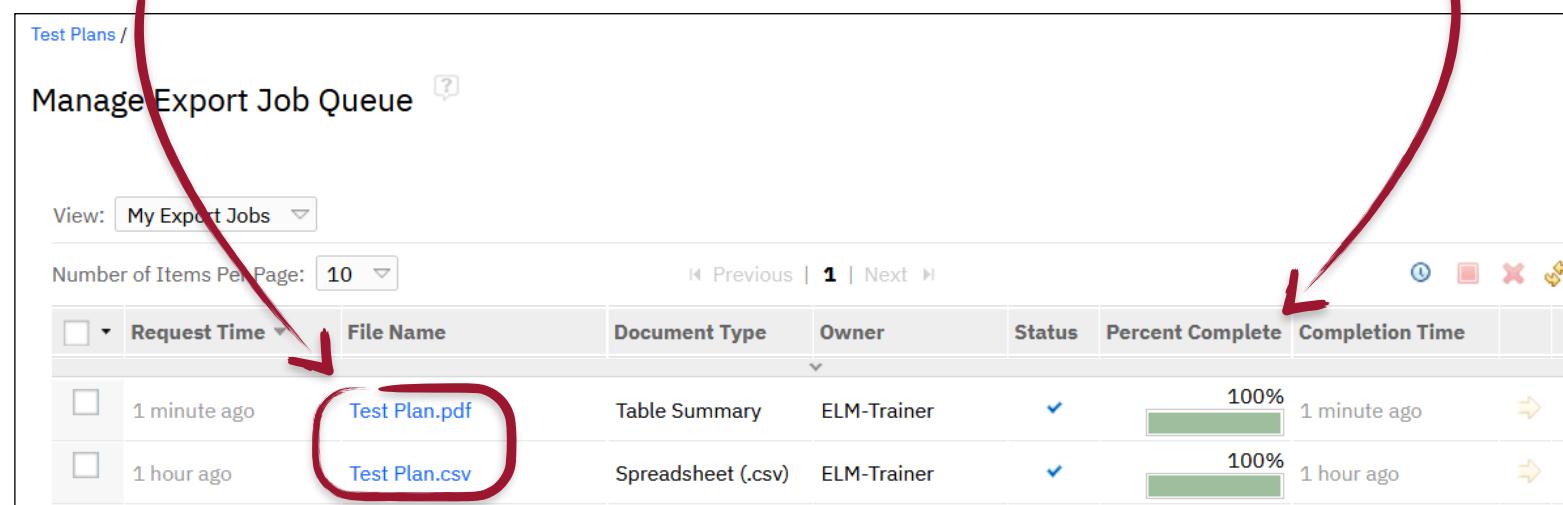


To export the list view as **CSV**:

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.

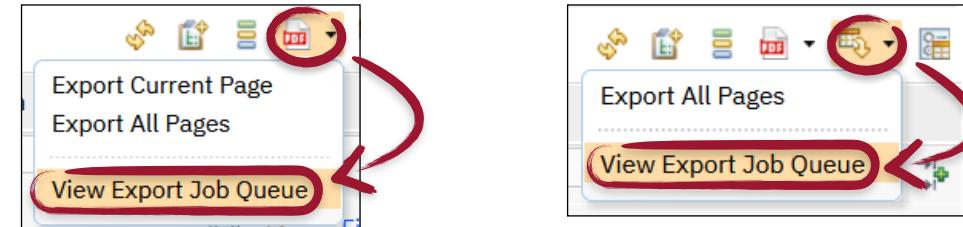


<input type="checkbox"/>	Request Time	File Name	Document Type	Owner	Status	Percent Complete	Completion Time
<input type="checkbox"/>	1 minute ago	<a href="#">Test Plan.pdf</a>	Table Summary	ELM-Trainer	<input checked="" type="checkbox"/>	100%	1 minute ago
<input type="checkbox"/>	1 hour ago	<a href="#">Test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

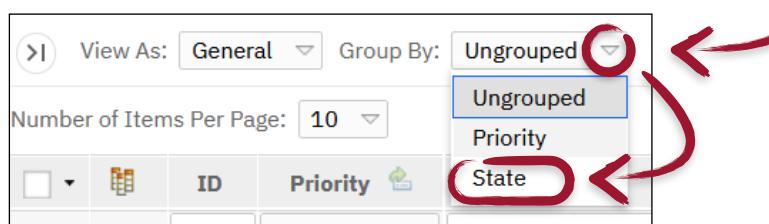


## Group the list

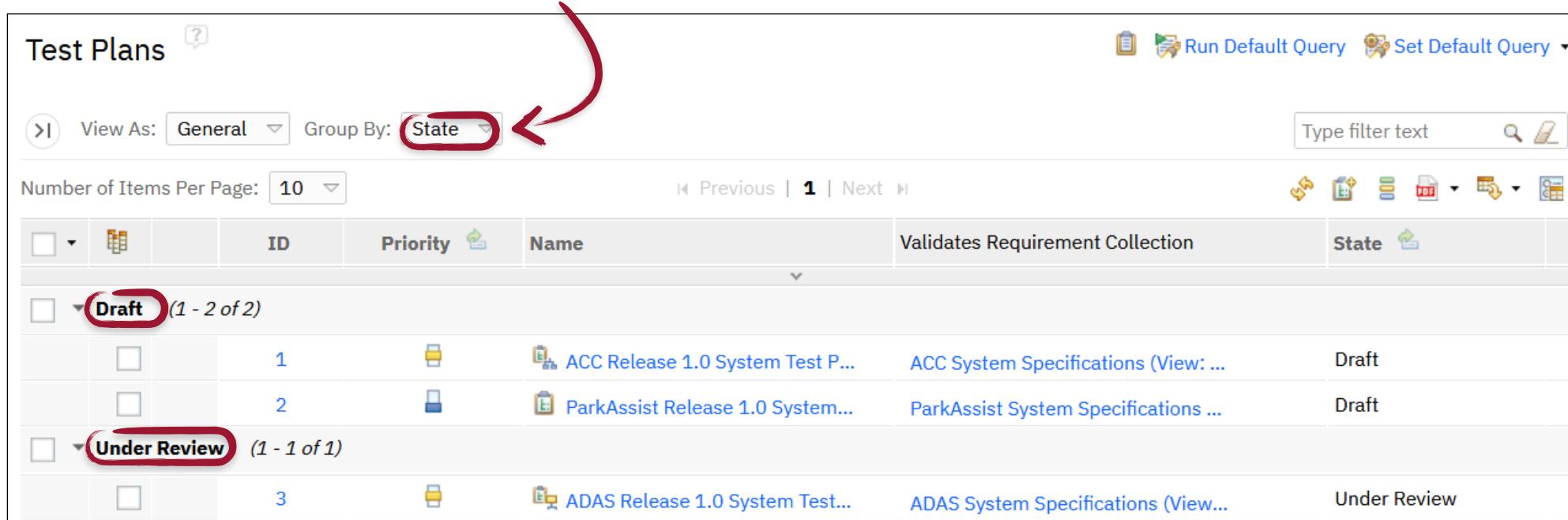
The list can be **grouped** by all columns except those that contain free text (such as the test artifact name) or links.

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.



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



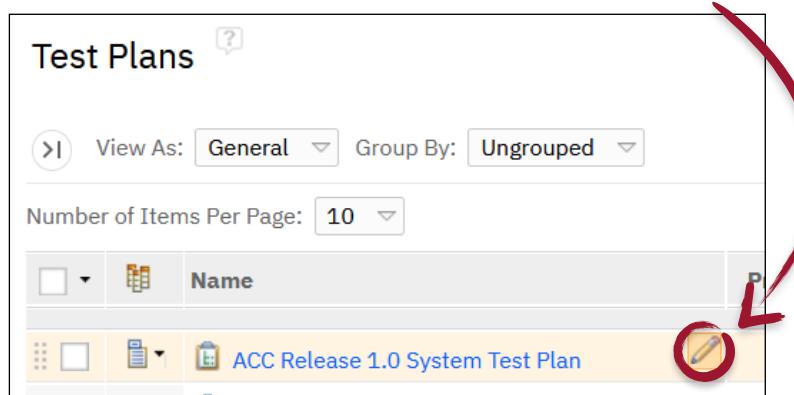
The screenshot shows a list view of test artifacts. At the top, there are filters for 'Number of Items Per Page' (set to 10), 'Priority', 'State', and a search bar containing 'Validates Requirement Collection'. Below these are two rows of data. The first row is a header with columns for 'Name', 'Priority', 'State', and 'Validates Requirement Collection'. The second row contains a checkbox, a folder icon, the name 'ACC Release 1.0 System Test Plan', a 'Draft' status, and a link 'ACC System Specifications (View: ...)'. A red circle and an arrow point to the name 'ACC Release 1.0 System Test Plan'.

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*.

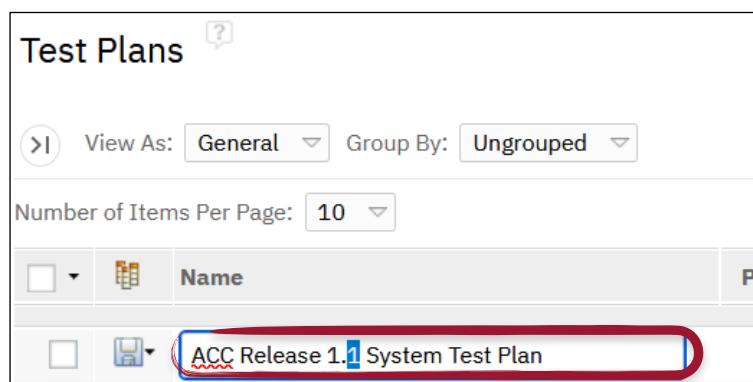
## Rename a Test Artifact

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



The screenshot shows a list view of test plans. At the top, there are filters for 'View As: General', 'Group By: Ungrouped', 'Number of Items Per Page' (set to 10), and a search bar containing 'Name'. Below these are two rows of data. The first row is a header with columns for 'Name' and 'Priority'. The second row contains a checkbox, a folder icon, the name 'ACC Release 1.0 System Test Plan', and a priority icon. A red circle and an arrow point to the name 'ACC Release 1.0 System Test Plan', specifically to the pencil icon that appears when the cursor is hovering over the text.

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

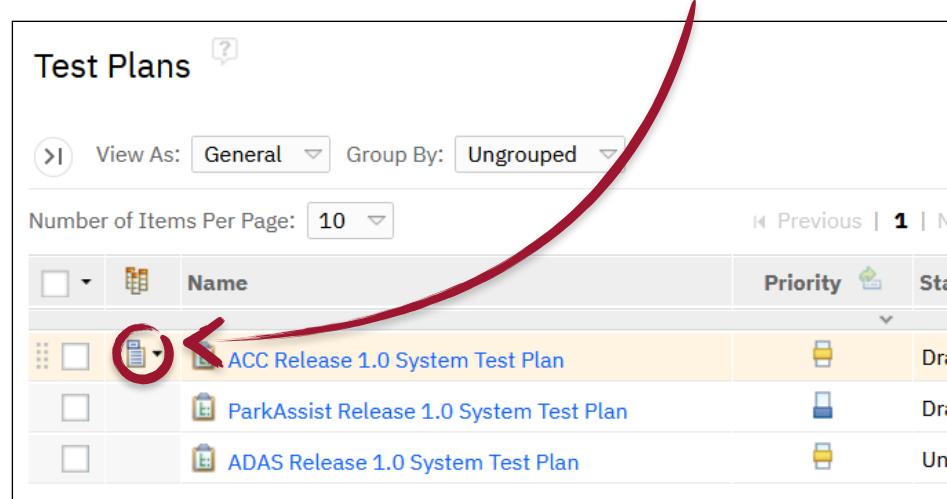


The screenshot shows the same list view as the previous one, but the name 'ACC Release 1.0 System Test Plan' is now highlighted with a red box, indicating it is selected for editing. The rest of the interface remains the same, with the 'View As' and 'Group By' filters at the top.

## Use the Context Menu to rename a Test Artifact

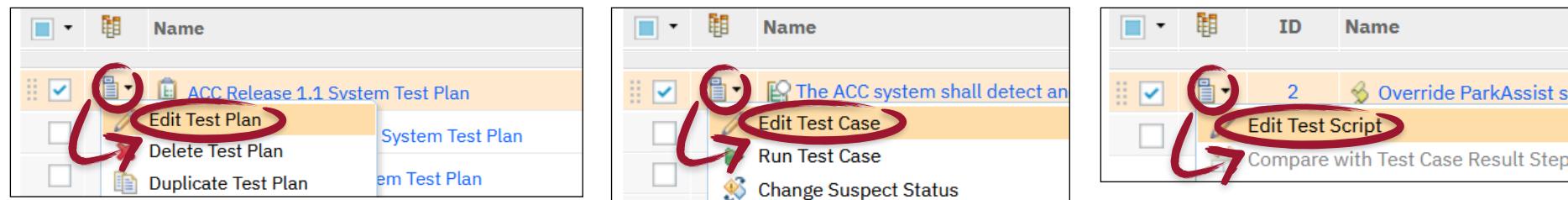
Alternatively, you can use the context menu of the corresponding test artifact.

To do this, hover over the row in the list to display the **context menu icon** in the context menu column.



Test Plans			
	Name	Priority	Status
<input type="checkbox"/>	ACC Release 1.0 System Test Plan		Draft
<input type="checkbox"/>	ParkAssist Release 1.0 System Test Plan		Draft
<input type="checkbox"/>	ADAS Release 1.0 System Test Plan		Unstarted

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



Test Plans	
Name	
<input checked="" type="checkbox"/>	ACC Release 1.1 System Test Plan
	<a href="#">Edit Test Plan</a>
	<a href="#">Delete Test Plan</a>
	<a href="#">Duplicate Test Plan</a>

Test Cases	
Name	
<input checked="" type="checkbox"/>	The ACC system shall detect an
	<a href="#">Edit Test Case</a>
	<a href="#">Delete Test Case</a>
	<a href="#">Run Test Case</a>
	<a href="#">Change Suspect Status</a>

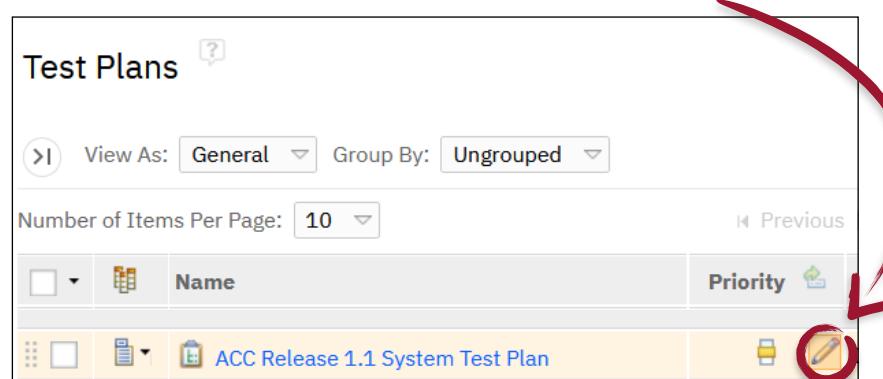
  

ID	Name
2	Override ParkAssist sy
	<a href="#">Edit Test Script</a>
	<a href="#">Compare with Test Case Result Steps</a>

## Editing Enumeration Attribute Values

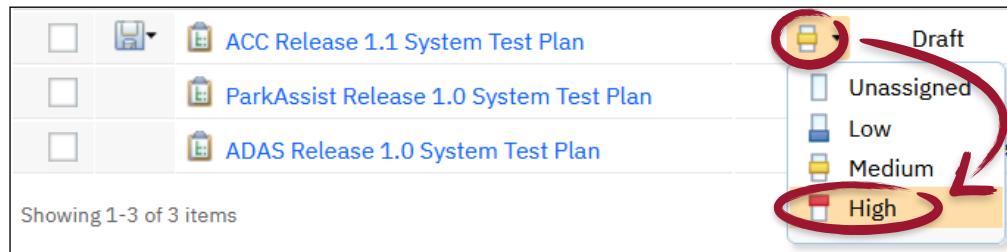
The values of **enumeration** attributes can be changed directly in the corresponding **column** of the list view (in the example below: the **Priority**).

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.



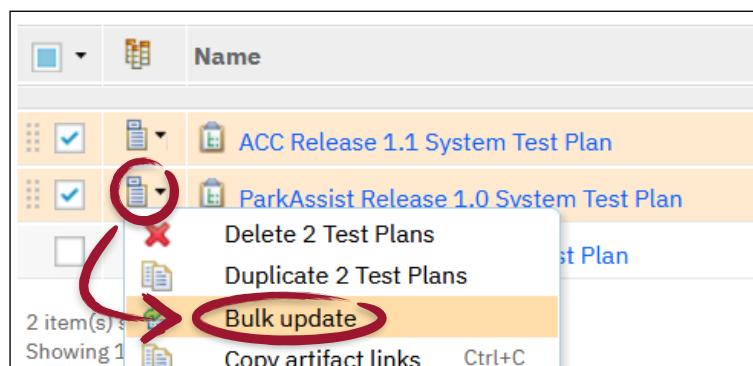
Test Plans			
	Name	Priority	Status
<input type="checkbox"/>	ACC Release 1.1 System Test Plan		Draft
<input type="checkbox"/>	ParkAssist Release 1.0 System Test Plan		Draft

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).



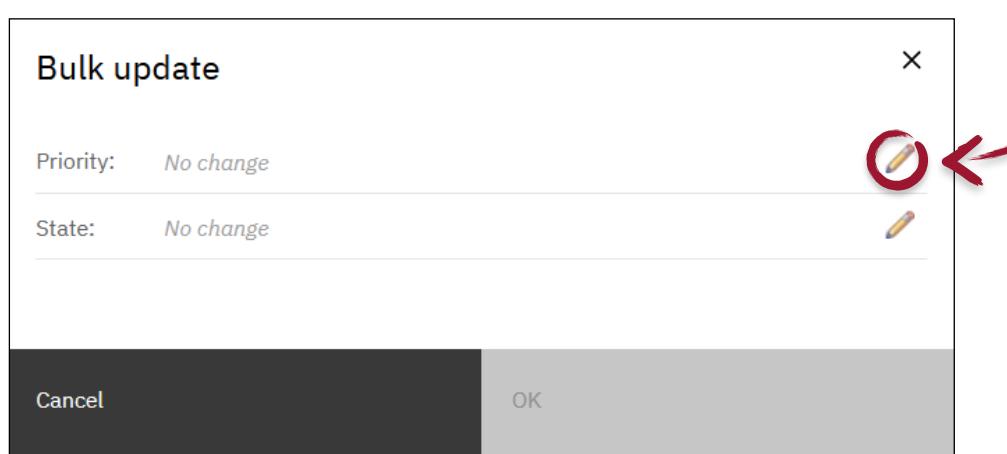
## Bulk Update Attributes

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.

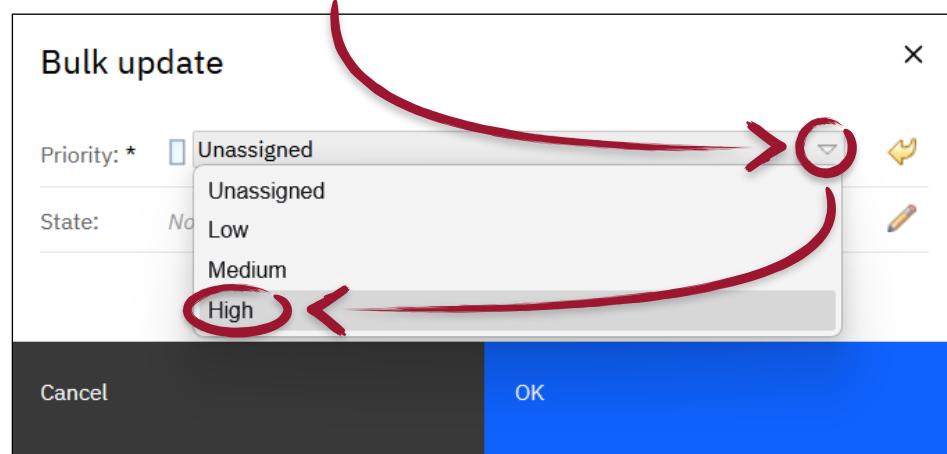


A **Bulk Update** dialog opens.

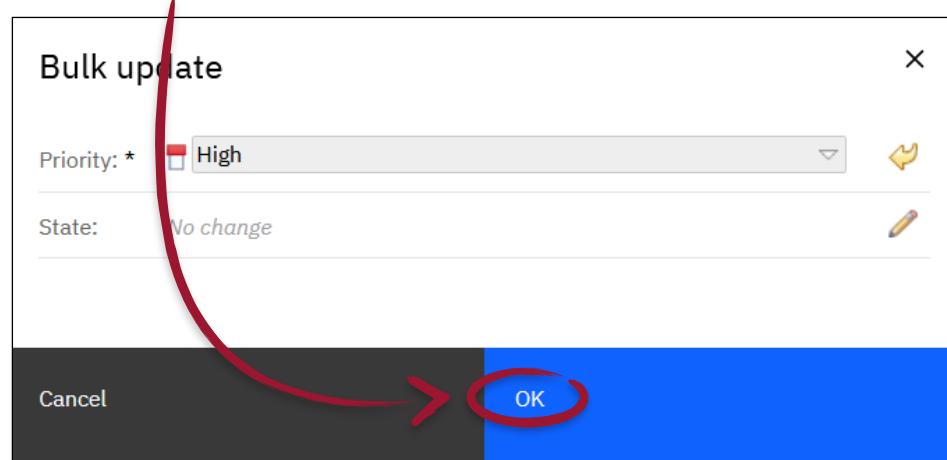
All editable columns are displayed there. To change the value of a column, click the *pencil* icon to the right of the column name (in the example: **Priority**).



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



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

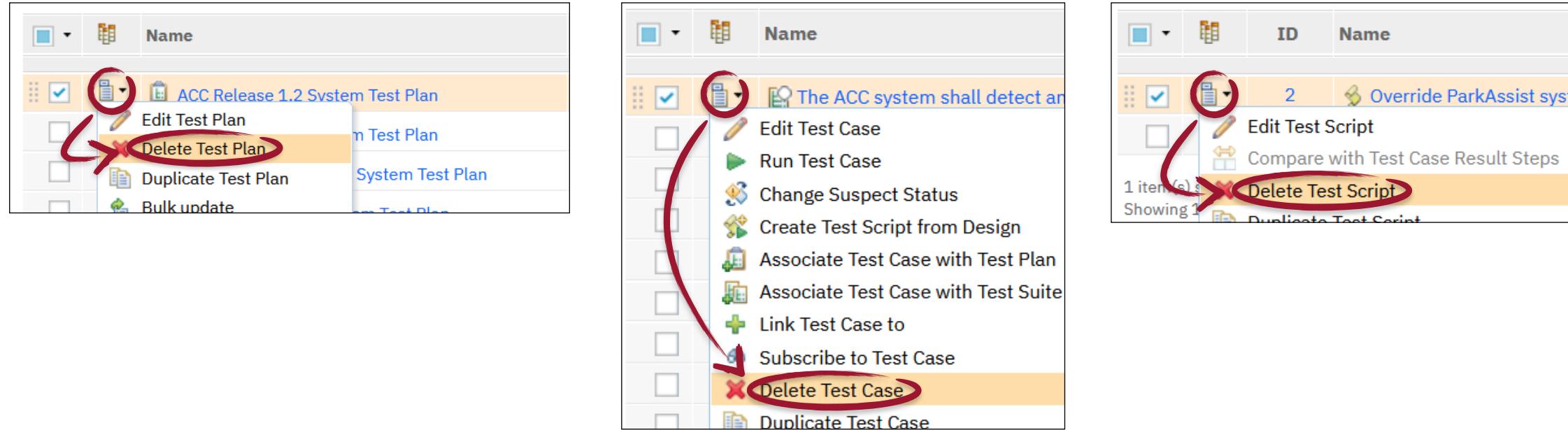


The values are *immediately* changed for the selected test plans and no additional click on a **Save** button is necessary (as is the case with an open test plan).

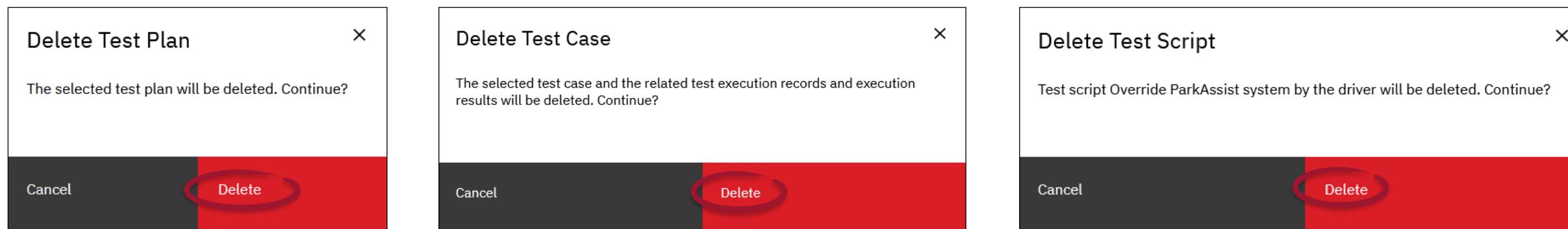
	Name	Priority	State
<input type="checkbox"/>	ACC Release 1.1 System Test Plan		Draft
<input type="checkbox"/>	ParkAssist Release 1.0 System Test Plan		Draft
<input type="checkbox"/>	ADAS Release 1.0 System Test Plan		Un

## 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

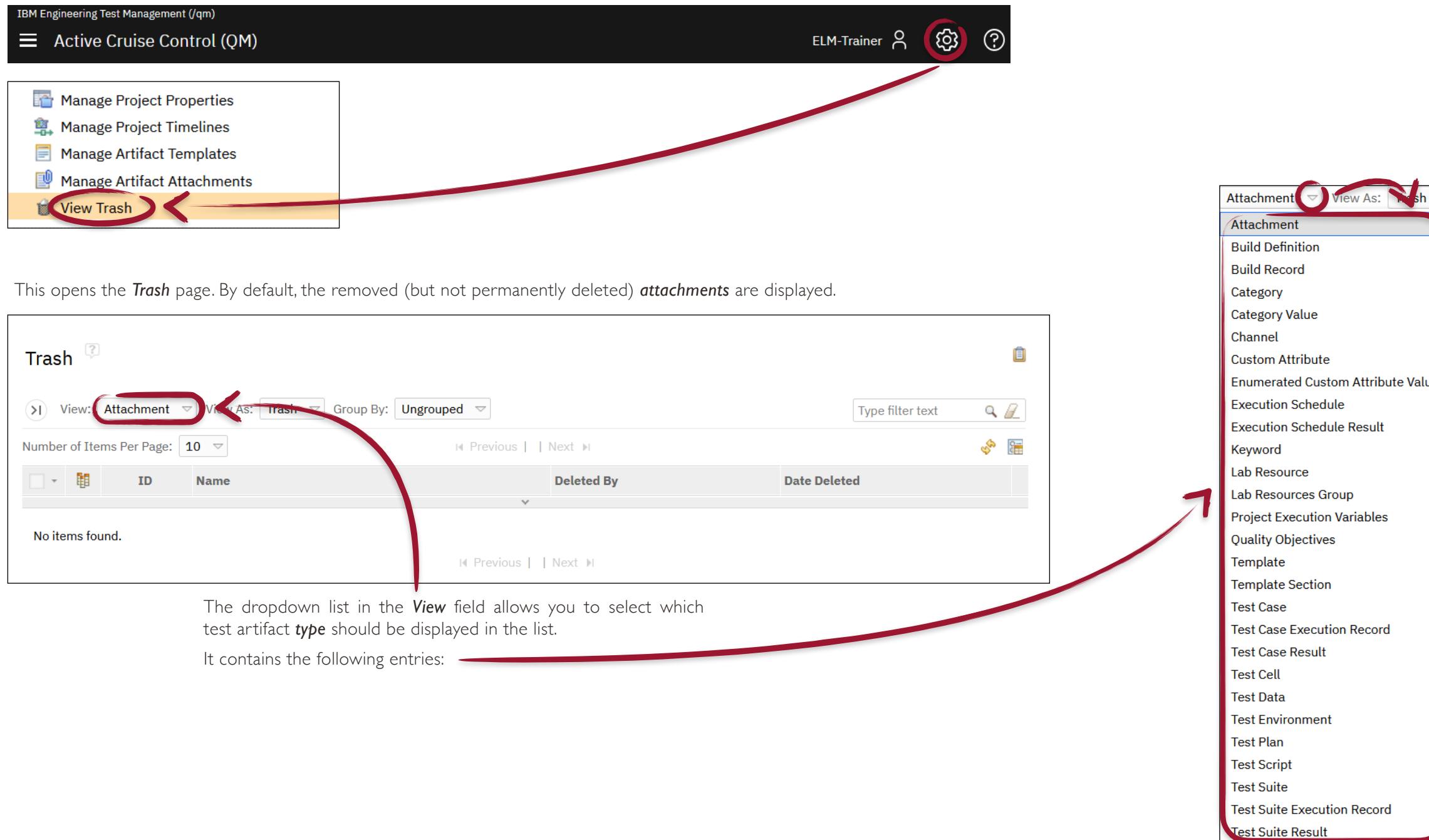
### Deleted Test Artifacts (e.g. from the List View)

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**.



The screenshot illustrates the process of navigating to the **Trash** page. It shows the **Administration Menu** (Gearwheel icon) and the **View Trash** option being selected. The **Trash** page displays a list of removed attachments, with a dropdown menu open showing various artifact types. A callout text at the bottom provides information about the dropdown menu.

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

The dropdown menu in the **View** field contains the following entries:

- Attachment
- Build Definition
- Build Record
- Category
- Category Value
- Channel
- Custom Attribute
- Enumerated Custom Attribute Value
- Execution Schedule
- Execution Schedule Result
- Keyword
- Lab Resource
- Lab Resources Group
- Project Execution Variables
- Quality Objectives
- Template
- Template Section
- Test Case
- Test Case Execution Record
- Test Case Result
- Test Cell
- Test Data
- Test Environment
- Test Plan
- Test Script
- Test Suite
- Test Suite Execution Record
- Test Suite Result

Example of a list of removed *test plans*:

Trash

View: Test Plan **View As: Trash** Group By: Ungrouped

Number of Items Per Page: 10

Type filter text

Previous | 1 | Next

ID	Name	Deleted By	Date Deleted
6	ADAS Release 1.3 System Test Plan	ELM-Trainer	3 minutes ago
7	ParkAssist Release 1.3 System Test Plan	ELM-Trainer	3 minutes ago

Showing 1-2 of 2 items

Trash

View: Test Plan **View As: Trash** Group By: Ungrouped

Number of Items Per Page: 10

Type filter text

Previous | 1 | Next

ID	Name
6	ADAS Release 1.3 System Test Plan
7	ParkAssist Release 1.3 System Test Plan

Showing 1-2 of 2 items

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

Number of Items Per Page: 10

Type filter text

Previous | 1 | Next

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

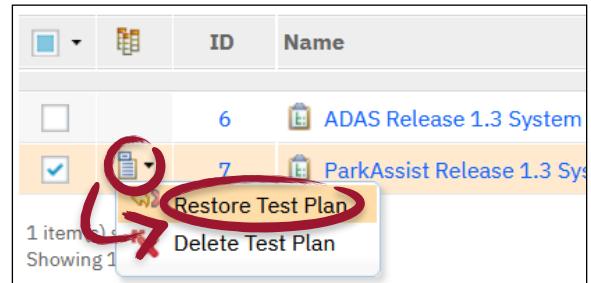
Showing 1-2 of 2 items



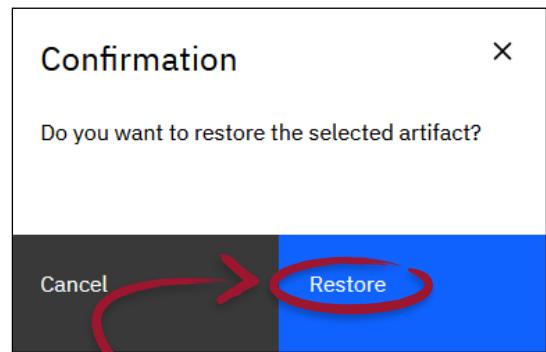
## Restoring a Test Artifact

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.

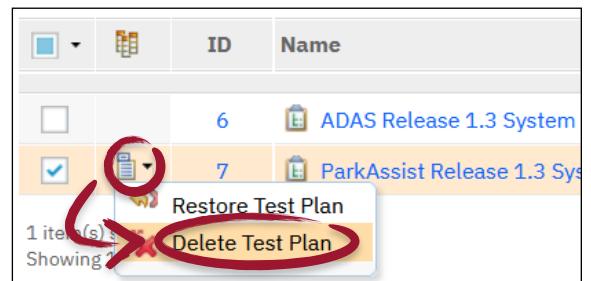


Click on **Restore** to actually restore the test artifact.

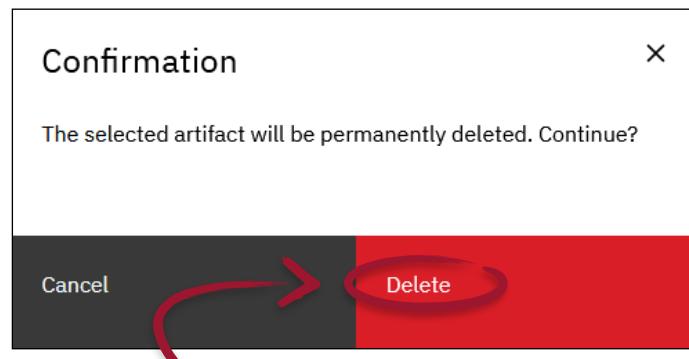
## Permanently deleting a Test Artifact

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.



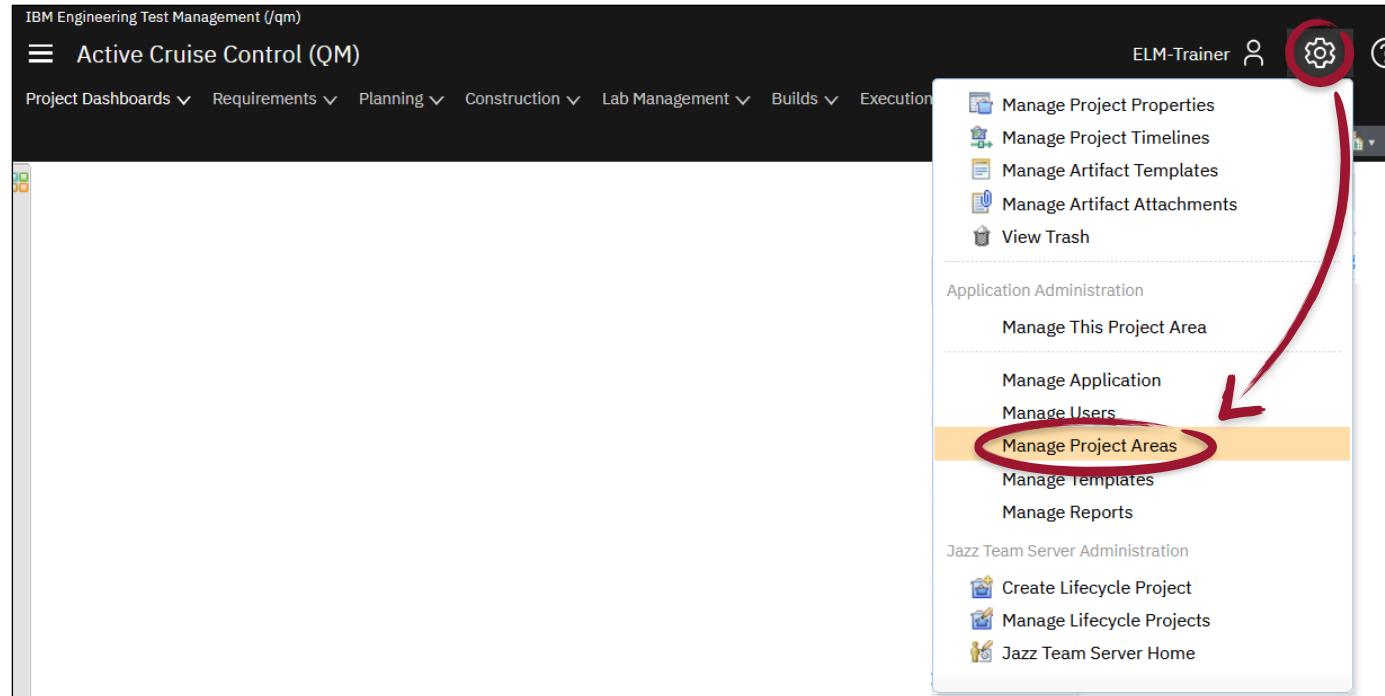
Because test artifacts often depend on other test artifacts, deleting or restoring one artifact *can affect several other artifacts*. In general, when an artifact is deleted or restored, its linked artifacts *remain unchanged*. For instance, deleting a test case, does not delete its associated test scripts. 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

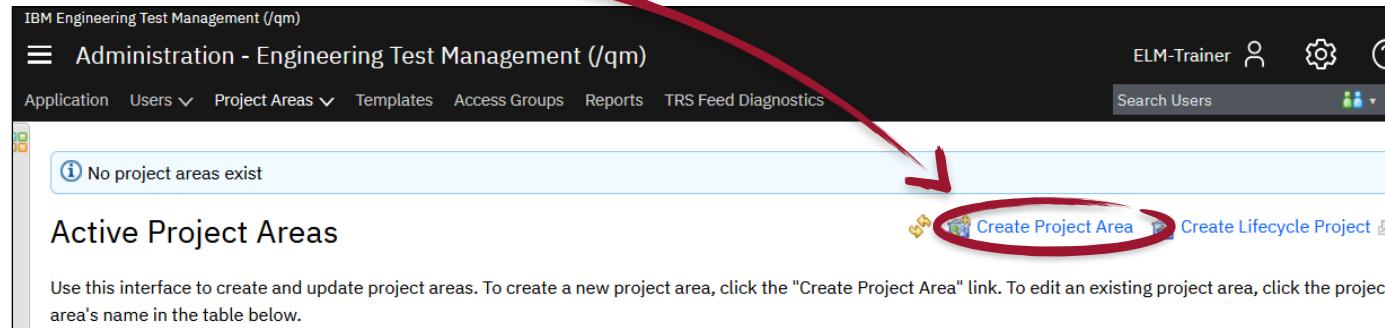
To *create a new project area*, do the following:

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



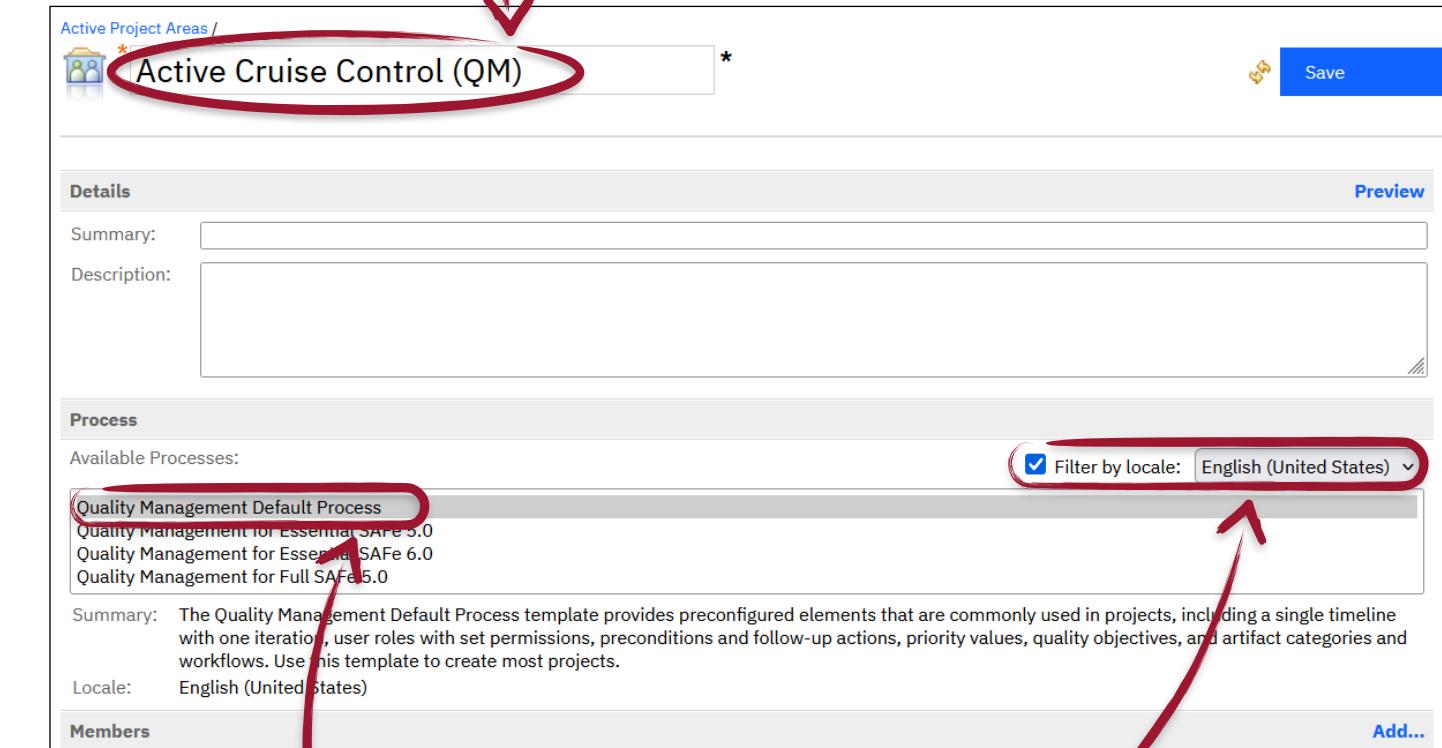
This opens the list of **Active Project Areas**.

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)**.

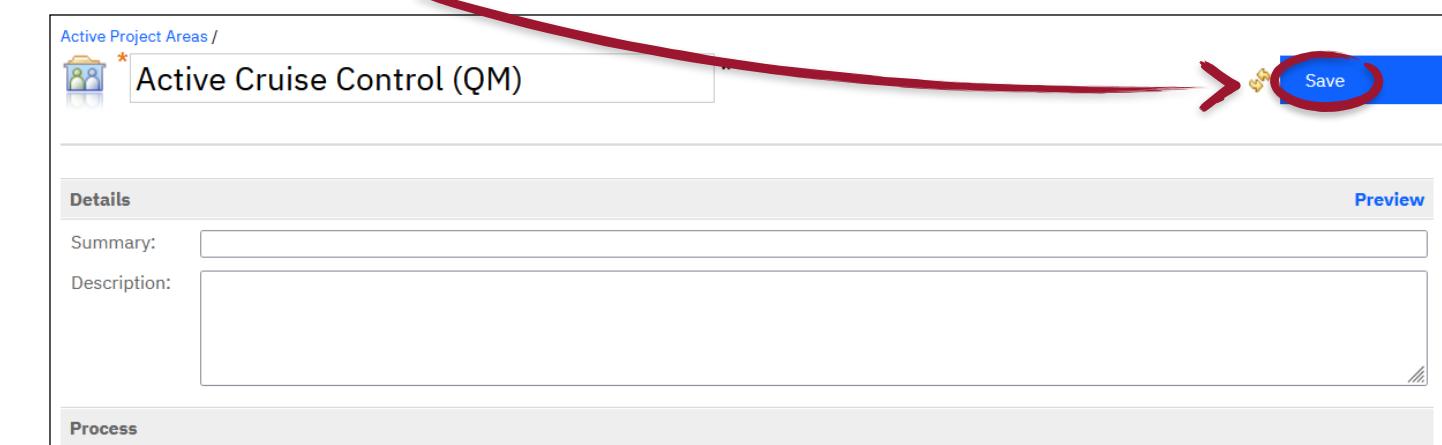


In section **Process**:

- 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.



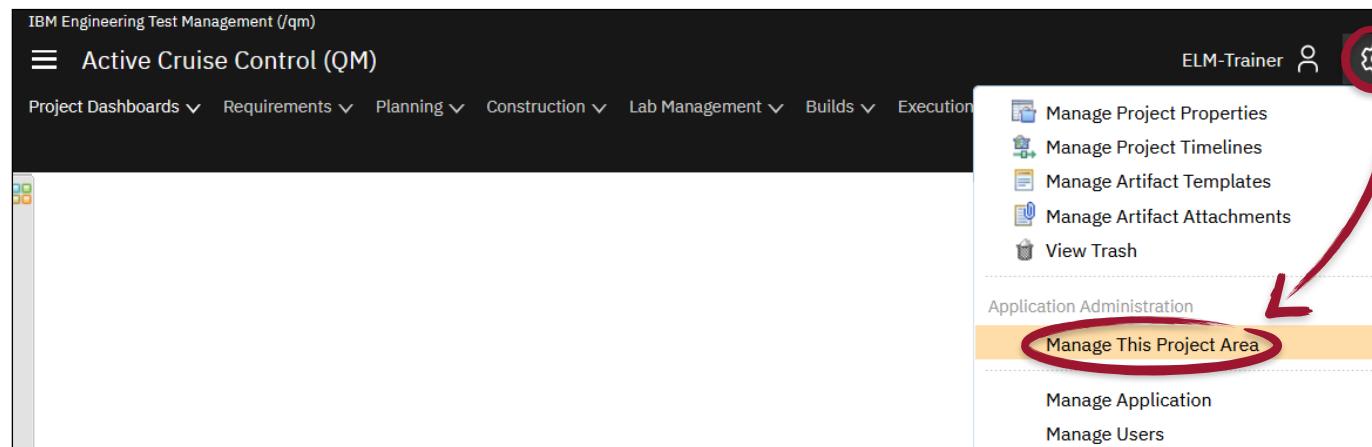
## 9 ADD ASSOCIATIONS TO DNG / EWM

### Associations between Project Areas

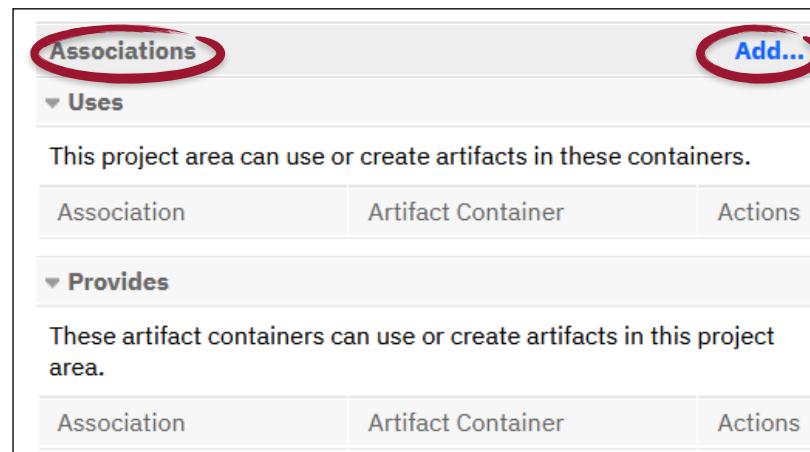
Associations between project areas of different ELM tools (such as ETM, DNG and EWM) makes it possible to link items between these different tools. For example, with the proper association its is possible to link a requirement (in DNG) with a test case (in ETM) or with a change request (in EWM).

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*.



Association	Artifact Container	Actions

**Provides**

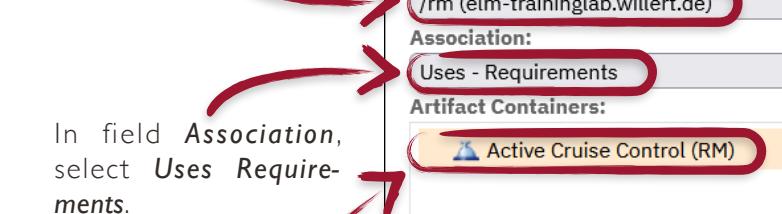
Association	Artifact Container	Actions

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

### Add Association to DNG

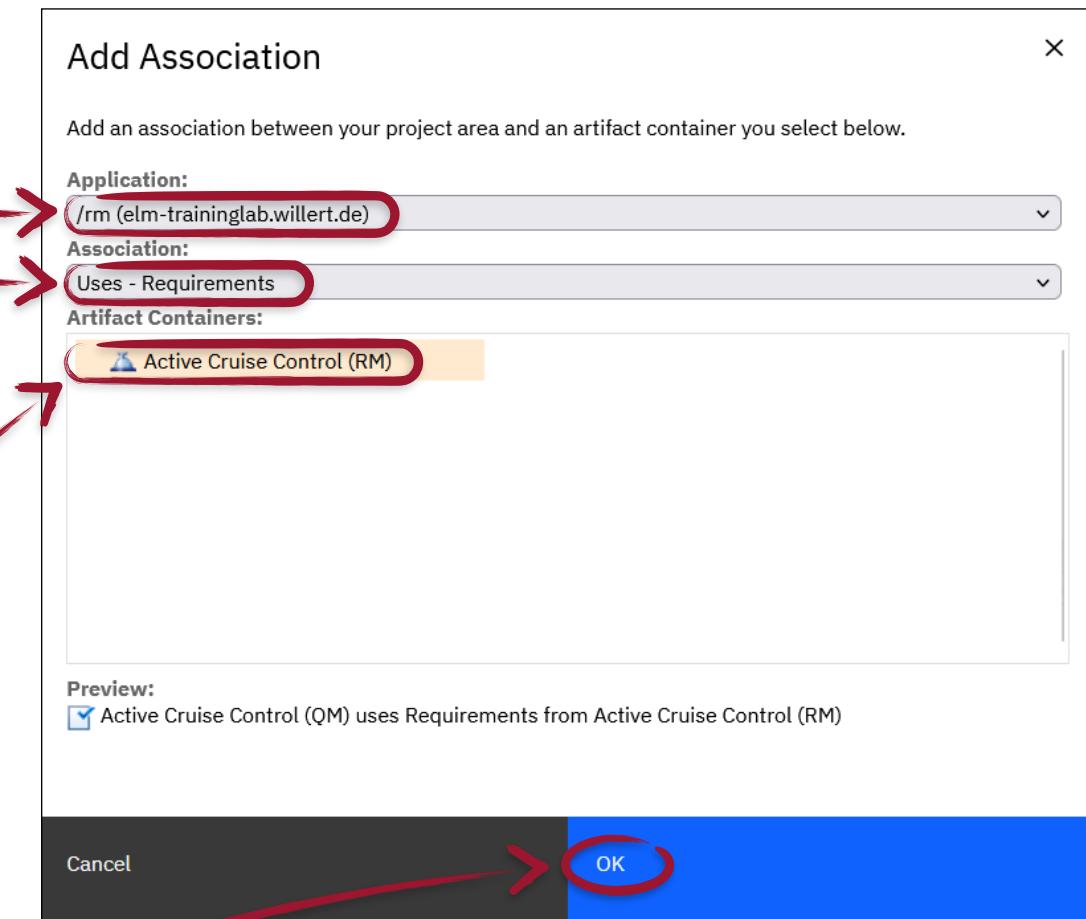
To define that ETM test artifacts can be linked to DNG artifacts (e.g. a test case to a requirement) ...

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

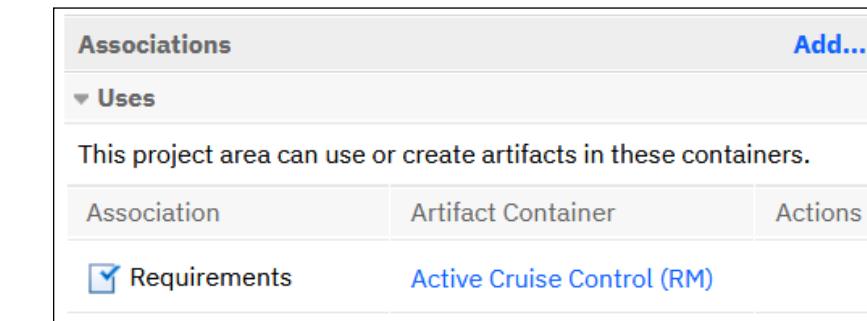


In field *Association*, select *Uses Requirements*.

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

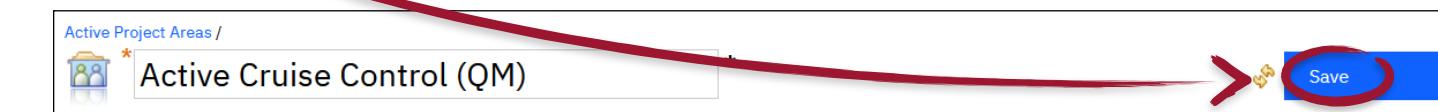


After clicking on *OK*, the new association will be displayed:



Association	Artifact Container	Actions
<input checked="" type="checkbox"/> Requirements	Active Cruise Control (RM)	

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)**.

**Add Association**

Add an association between your project area and an artifact container you select below.

**Application:** **/ccm (elm-traininglab.willert.de)**

**Association:** **Uses - Defects**

**Artifact Containers:** **Active Cruise Control (CCM)**

**Preview:**  Active Cruise Control (QM) uses Defects from Active Cruise Control (CCM)

**Cancel** **OK**

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)**.

**Add Association**

Add an association between your project area and an artifact container you select below.

**Application:** **/ccm (elm-traininglab.willert.de)**

**Association:** **Uses - Quality Management Tasks**

**Artifact Containers:** **Active Cruise Control (CCM)**

**Preview:**  Active Cruise Control (QM) uses Quality Management Tasks from Active Cruise Control (CCM)

**Cancel** **OK**

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

The additional associations will be displayed:

Associations			<a href="#">Add...</a>
▼ <b>Uses</b>			
This project area can use or create artifacts in these containers.			
Association	Artifact Container	Actions	
<input checked="" type="checkbox"/> 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.

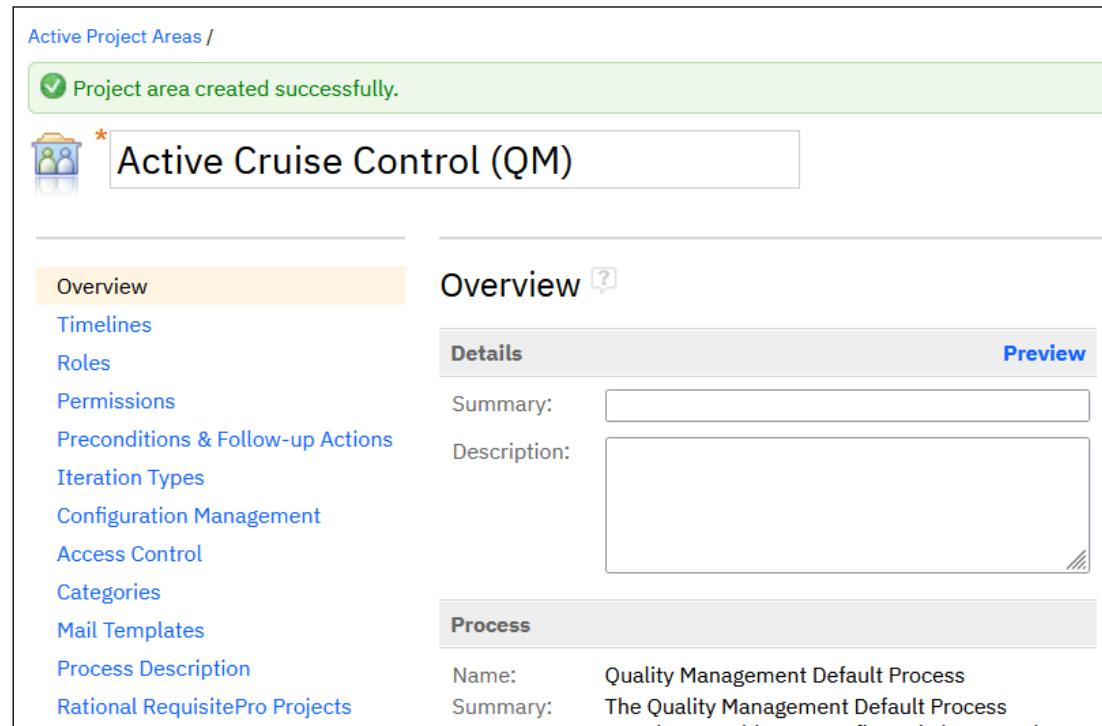
Active Project Areas / **Active Cruise Control (QM)**

**Save**

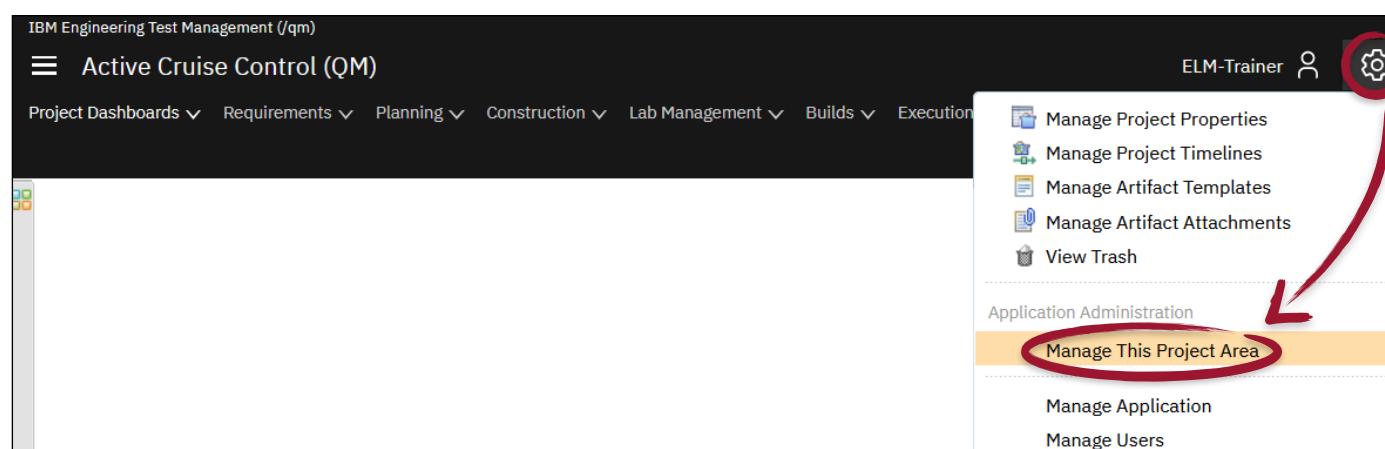
## 10 ADD USERS AND ASSIGN ROLES

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

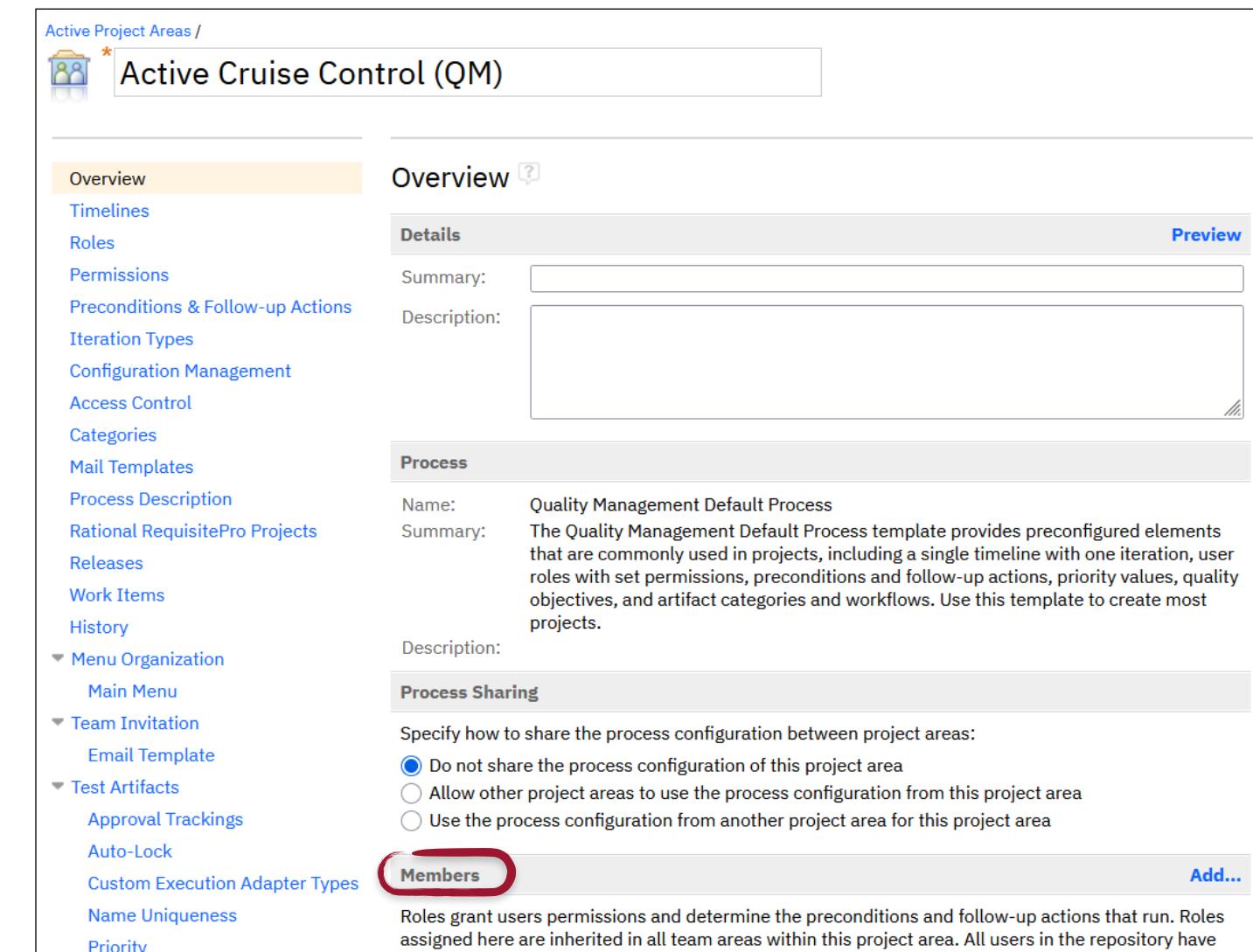
If a new project area has just been created (see previous chapter *Create a new Project Area*) you are already on its *administration page*.



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

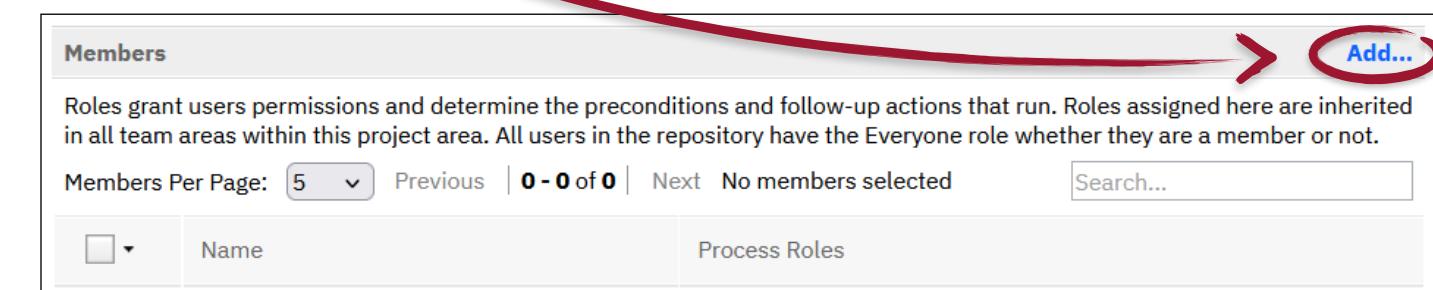


On the administration page of the current project area, scroll down to section **Members**.



Name	Process Roles	
		<input type="checkbox"/>

In section **Members** click on **Add**:

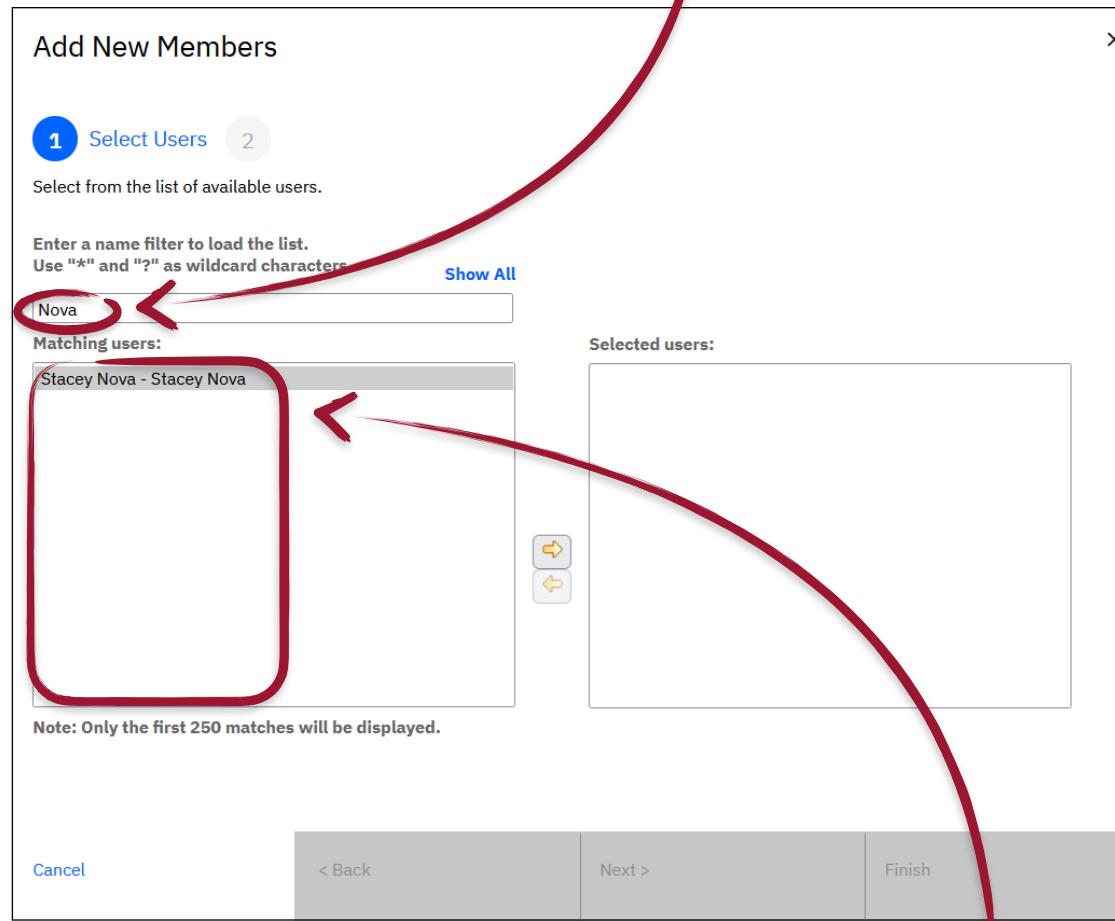


Name	Process Roles

An **Add New Members** dialog opens.

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

- I. 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:**

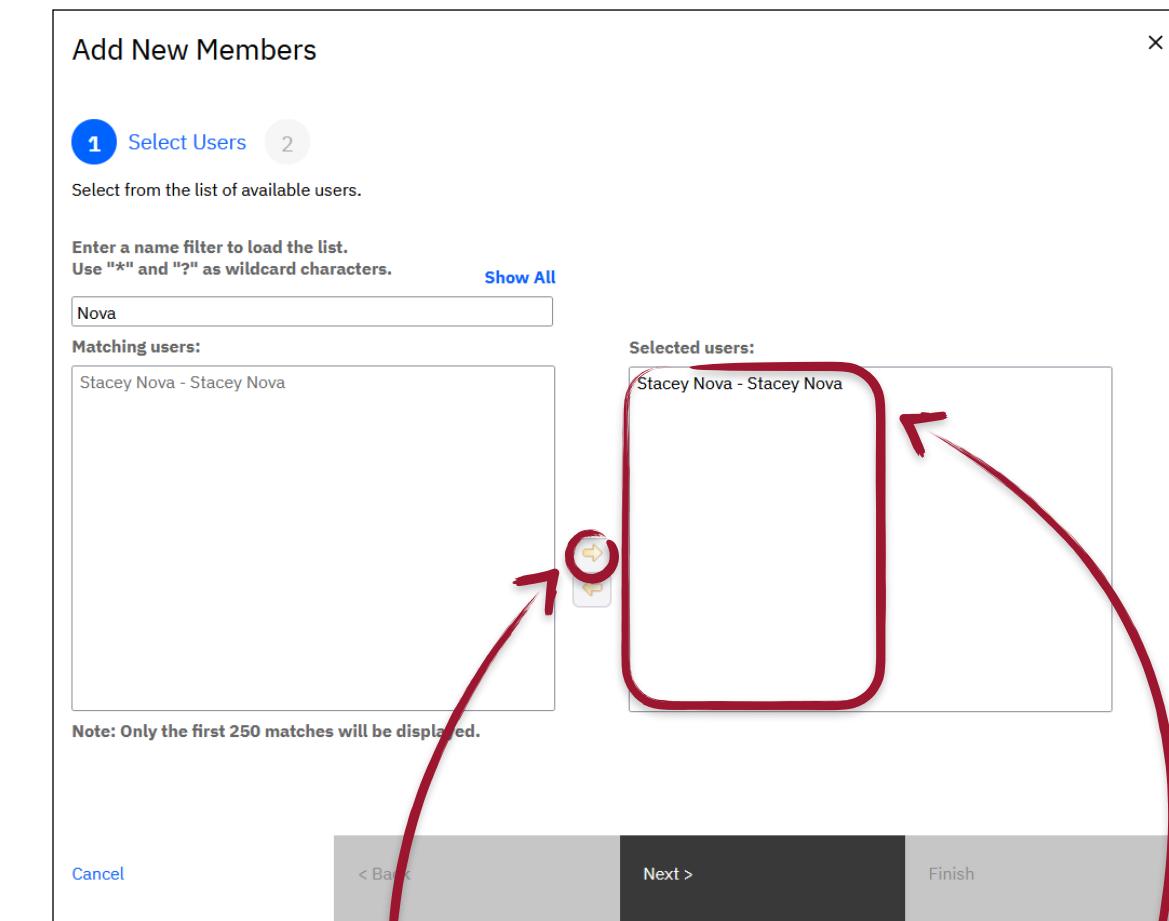
Stacey Nova - Stacey Nova

**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:**

- 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

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.



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

Members		
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
	Name	Process Roles
	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)**

**Save**

Overview Timelines Roles Permissions Details Preview Team Area Hierarchy Active Cruise Control (OM)

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

Active Project Areas / **Active Cruise Control (QM)**

**Explore Project** Save

Overview Timelines Roles Permissions Details Preview Team Area Hierarchy Active Cruise Control (OM)

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