



SpiraTeam® | Quick Start Guide

Inflectra Corporation

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The Inflectra logo consists of the word "inflectra" in a lowercase, black, sans-serif font. The letter "i" has a small dot above it. Below the word is a thick, yellow, horizontal wavy line. Above the "r" in "inflectra" is a small registered trademark symbol (®).

Contents

Introduction	2
1. Logging In and Selecting a Project	3
2. Define the Requirements	4
3. Create the Release and Iteration Plan	7
4. Adding Requirement Tasks	9
5. Adding the Test Cases	12
6. Planning the Iteration	16
7. Assigning the Requirements & Tasks	18
8. Scheduling the Testing Activities	22
9. Running Tests and Logging Incidents	24
10. Triaging Issues and Defects	28
11. Reviewing Your Project	32
Legal Notices	33

Introduction

The Spira™ family of applications from Inflectra® are a powerful set of tools that help you manage your software lifecycle.

SpiraTeam® is our integrated Application Lifecycle Management (ALM) system that manages your project's requirements, releases, test cases, issues and tasks in one unified environment.

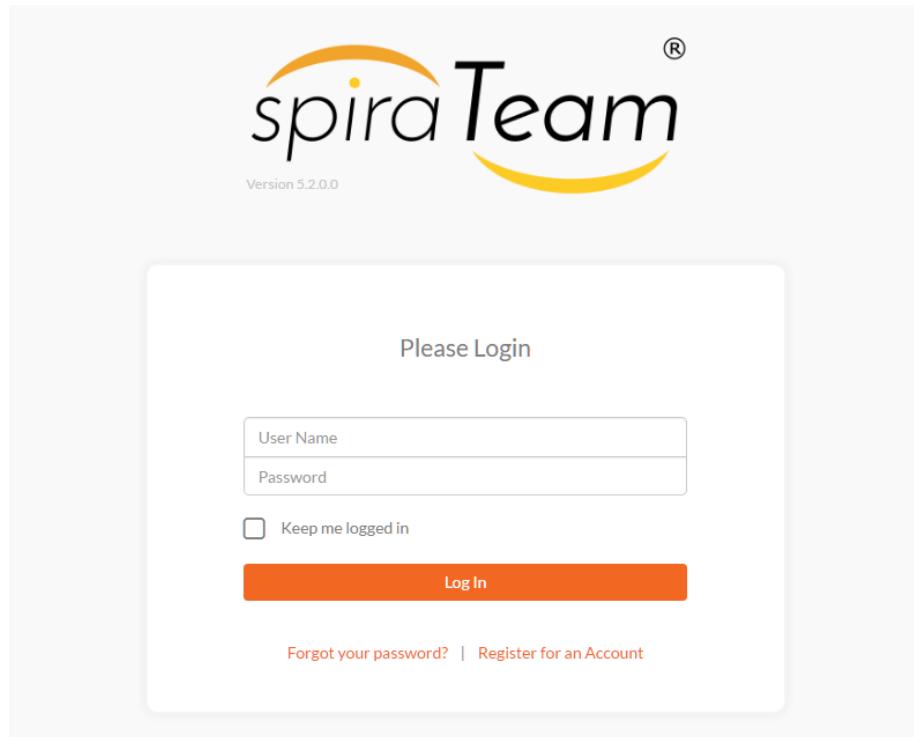
This guide provides a quick step-by-step tutorial for creating a sample SpiraTeam project, adding some requirements and releases, building the test plan, assigning the backlog items to the various sprints, executing the tests and logging defects, and finally triaging and resolving the bugs/issues raised.

For further information on using SpiraTeam, please refer to the more comprehensive *SpiraTeam User Manual*.

For information on setting up a new SpiraTeam instance, creating projects and users and other administration tasks, please refer to the *SpiraTeam Administration Guide*.

1. Logging In and Selecting a Project

Once you have either downloaded and installed a trial version of SpiraTeam or signed up for a hosted trial, you should be able to see the following login screen in your web browser:



Enter the following default login and password to start using the system:

- Login: administrator
- Password: PleaseChange

Once you have logged-in, you should be taken to the “My Page” for your user. Please note, that the very first time you log in you will be asked if you want to take a quick orientation tour of the application (which will look similar to the screenshot below).

The image shows the "My Page" interface. At the top, there's a navigation bar with a dropdown for "Choose Project", a search bar, and a user dropdown for "System Admin.". The main area has a sidebar with "My Projects" (listing "Library Information System", "Sample Application One", and "Sample Application Two"), "My Saved Search" (empty), and "My Assigned Requests" (empty). The central content area features the Spira logo and the text "Welcome to Spira!". It includes a message about taking a tour and two buttons: "Yes Please" and "No Thanks". On the right, there's a sidebar for "Publish Date" showing recent activity: "14 hours 22 minutes ago", "4/17/2017", "4/10/2017", "4/7/2017", and "4/4/2017". A "Quick Launch" section at the bottom allows creating incidents.

Initially this page will be fairly empty, with only the list of sample projects populated. This is normal.

The screenshot shows the 'My Page' dashboard for the 'Library Information System' project. The top navigation bar includes links for 'Planning', 'Testing', 'Tracking', and 'Reporting'. The main content area is divided into several sections:

- My Projects:** A table showing three projects: 'Library Information System' (Internal Projects, 30-Nov-2005), 'Sample Application One' (Internal Projects, 30-Nov-2005), and 'Sample Application Two' (External Projects, 30-Nov-2005).
- My Saved Searches:** A table with columns for 'Name' and 'Project'.
- My Assigned Requirements:** A table with columns for 'Name', 'Project', 'Importance', and 'Status'.
- My Assigned Test Cases:** A section with a link to 'View All'.
- My News Feeds:** A list of news items with columns for 'Headline', 'Author', and 'Publish Date'.
- Quick Launch:** A section for creating incidents, with a dropdown for 'Create Incident in:' set to 'Library Information System'.

For this tutorial we want to start out with an empty project that has no data in it, so click the hyperlink under "My Projects" for "Sample Application Two". That will bring up the homepage for the empty project:

The screenshot shows the homepage for the 'Sample Application Two' project. The top navigation bar includes links for 'Planning', 'Testing', 'Tracking', and 'Reporting'. The main content area is divided into several sections:

- Project Overview:** Displays project details: Group: External Projects, Web Site: [View All](#), Owner(s): System Administrator.
- Activity Stream:** A section with a 'View All' button.
- Shared Searches:** A table with columns for 'Name' and 'Creator'.
- Requirements Summary:** A table showing requirement status: Status (1 - Critical, 2 - High, 3 - Medium, 4 - Low, (None)), TOTAL, and a 'View Details' button.
- Top Open Issues:** A table with columns for 'Description', 'Priority', 'Owned By', and 'Date Opened'.
- Top Open Risks:** A table with columns for 'Description', 'Priority', 'Owned By', and 'Date Opened'.
- Test Execution Status:** A chart showing test execution status with categories Failed, Passed, Run, Blocked, and Caution. It includes metrics: Total # Runs: 0, Daily Run Count: 0, and a 'View Details' button.

The project home page will display various widgets containing key project metrics; however they will be initially empty. The next step will be to start entering your project's data.

2. Define the Requirements

Click on the Planning > Requirements menu option to display the project's requirements list page:

The terminology in SpiraTeam is designed to be methodology agnostic, however the following table illustrates the nomenclature used in SpiraTeam and how it relates to some common agile methodologies:

SpiraTeam	Extreme Programming	Scrum	AgileUP / DSDM
Summary Requirement	Epic	Epic	Feature Group
Requirement	User Story	Backlog Item	Requirement
Task	Task	Task	Task
Release	Release	Release	Release
Iteration	Iteration	Sprint	Iteration

Initially the requirements list will be empty. Click on the “Insert” button in the main toolbar to create the following requirements in turn:

- Functional Requirements
- Module 1
- System must allow entry of users
- System must allow the modification of users
- System must allow the deletion of users
- Module 2
- System should allow administrators to setup notifications

You should now have a simple flat requirements list, as illustrated below:

Now to correctly indent the requirements, select the checkboxes of all the requirements under “Functional Requirements” and click ‘Indent’. Then select the three requirements under “Module 1” and click ‘Indent’ again. Finally, right-click on the last requirement and choose ‘Indent’ from the popup context menu. You should now have a list that looks like:

Requirements / Planning Board / Releases / Documents											Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="--- Show Level ---"/> <input type="button" value="▼ Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value=">Show/hide columns"/>											
Displaying 7 out of 7 requirement(s) for this project.											
▼ Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID	Edit		
Functional Requirements	Not Covered	No Tasks	Requested	System Administrator	Package	RQ:37	Feature	RQ	<input type="button" value="Edit"/>		
Module 1	Not Covered	No Tasks	Requested	System Administrator	Package	RQ:38	Feature	RQ	<input type="button" value="Edit"/>		
System must allow entry of users	Not Covered	No Tasks	Requested	System Administrator	Feature	RQ:39	Feature	RQ	<input type="button" value="Edit"/>		
System must allow the modification of users	Not Covered	No Tasks	Requested	System Administrator	Feature	RQ:40	Feature	RQ	<input type="button" value="Edit"/>		
System must allow the deletion of users	Not Covered	No Tasks	Requested	System Administrator	Feature	RQ:41	Feature	RQ	<input type="button" value="Edit"/>		
Module 2	Not Covered	No Tasks	Requested	System Administrator	Package	RQ:42	Feature	RQ	<input type="button" value="Edit"/>		
System should allow administrators to setup notifications	Not Covered	No Tasks	Requested	System Administrator	Feature	RQ:43	Feature	RQ	<input type="button" value="Edit"/>		

We finally want to set a type and priority value for the different requirements, to do that we can simply click the “select all” checkbox at the top of the list and then click on the top ‘Edit’ button in the right-hand column of that same row. That will make all the requirement rows editable:

Requirements / Planning Board / Releases / Documents											Role: Project Owner	
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="--- Show Level ---"/> <input type="button" value="▼ Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value=">Show/hide columns"/>											Current Project	All Projects
Displaying 7 out of 7 requirement(s) for this project.												
▼ Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID	Edit			
<input checked="" type="checkbox"/> Functional Requirement	Not Covered	No Tasks	None	Requested	System Admin	None	Feature	RQ:37	<input type="button" value="Edit"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>		
<input checked="" type="checkbox"/> Module 1	Not Covered	No Tasks	None	Requested	System Admin	None	Package	RQ:38	<input type="button" value="Edit"/>			
<input checked="" type="checkbox"/> System must allow entry of users	Not Covered	No Tasks	None	Requested	System Admin	None	Feature	RQ:39	<input type="button" value="Edit"/>			
<input checked="" type="checkbox"/> System must allow the modification of users	Not Covered	No Tasks	None	Requested	System Admin	None	Feature	RQ:40	<input type="button" value="Edit"/>			
<input checked="" type="checkbox"/> System must allow the deletion of users	Not Covered	No Tasks	None	Requested	System Admin	None	Feature	RQ:41	<input type="button" value="Edit"/>			
<input checked="" type="checkbox"/> Module 2	Not Covered	No Tasks	None	Requested	System Admin	None	Package	RQ:42	<input type="button" value="Edit"/>			
<input checked="" type="checkbox"/> System should allow administrators to setup notifications	Not Covered	No Tasks	None	Requested	System Admin	None	Feature	RQ:43	<input type="button" value="Edit"/>			

Now, set the type of all your requirements to ‘User Story’ and choose some different values for the ‘Importance’ field and click Update. Now you will have a prioritized list of user story requirements:

Requirements / Planning Board / Releases / Documents											Role: Project Owner	
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="--- Show Level ---"/> <input type="button" value="▼ Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value=">Show/hide columns"/>											Current Project	All Projects
Displaying 7 out of 7 requirement(s) for this project.												
▼ Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	ID	Edit			
Functional Requirements	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	Package	Feature	RQ:37	<input type="button" value="Edit"/>			
Module 1	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	User Story	User Story	RQ:38	<input type="button" value="Edit"/>			
System must allow entry of users	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	User Story	User Story	RQ:39	<input type="button" value="Edit"/>			
System must allow the modification of users	Not Covered	No Tasks	2 - High	Requested	System Administrator	User Story	User Story	RQ:40	<input type="button" value="Edit"/>			
System must allow the deletion of users	Not Covered	No Tasks	2 - High	Requested	System Administrator	User Story	User Story	RQ:41	<input type="button" value="Edit"/>			
Module 2	Not Covered	No Tasks	2 - High	Requested	System Administrator	Package	Feature	RQ:42	<input type="button" value="Edit"/>			
System should allow administrators to setup notifications	Not Covered	No Tasks	2 - High	Requested	System Administrator	User Story	User Story	RQ:43	<input type="button" value="Edit"/>			

Now that we have prioritized the requirements, the developers or business analysts responsible for estimating the complexity of each requirement need to enter estimates. To do that we first need to display the estimate column in the grid. To do that, click on the “Show/Hide Columns” dropdown list and show the Estimate column. This will display the requirements’ estimates in the grid:

Requirements / Planning Board / Releases / Documents											Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>											
Displaying 7 out of 7 requirement(s) for this project.											
Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	Estimate	ID	Edit	
Functional Requirements	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	Package	4.0	RQ:37		<input type="button" value="Edit"/>	
Module 1	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	Package	3.0	RQ:38		<input type="button" value="Edit"/>	
System must allow entry of users	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	User Story	1.0	RQ:39		<input type="button" value="Edit"/>	
System must allow the modification of users	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	User Story	1.0	RQ:40		<input type="button" value="Edit"/>	
System must allow the deletion of users	Not Covered	No Tasks	3 - Medium	Requested	System Administrator	User Story	1.0	RQ:41		<input type="button" value="Edit"/>	
Module 2	Not Covered	No Tasks	2 - High	Requested	System Administrator	Package	1.0	RQ:42		<input type="button" value="Edit"/>	
System should allow administrators to setup notifications	Not Covered	No Tasks	2 - High	Requested	System Administrator	User Story	1.0	RQ:43		<input type="button" value="Edit"/>	

By default, all the requirements will have been assigned a default estimate of 1.0 points. The points are not a defined number of hours, but are instead an indication of the size of the requirement. The estimates should reflect how big each of the requirements are relative to each other.

Now, we can simply click the “select all” checkbox at the top of the list and then click on the top ‘Edit’ button in the right-hand column. The requirements will be displayed in editable mode again. Enter the following initial estimates for the requirements:

Requirement	Estimate
System must allow entry of users	1.5 points
System must allow the modification of users	2.0 points
System must allow the deletion of users	1.0 points
System should allow administrators to setup notifications	2.0 points

You should now have the requirements' estimates displayed in the system:

Requirements / Planning Board / Releases / Documents											Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>											
Displaying 7 out of 7 requirement(s) for this project.											
Name	Test Coverage	Progress	Importance	Status	Author	Release	Type	Estimate	ID	Edit	
Functional Requirements	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	Package	6.5	RQ:37		<input type="button" value="Edit"/>	
Module 1	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	Package	4.5	RQ:38		<input type="button" value="Edit"/>	
System must allow entry of users	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	User Story	1.5	RQ:39		<input type="button" value="Edit"/>	
System must allow the modification of users	Not Covered	No Tasks	1 - Critical	Requested	System Administrator	User Story	2.0	RQ:40		<input type="button" value="Edit"/>	
System must allow the deletion of users	Not Covered	No Tasks	3 - Medium	Requested	System Administrator	User Story	1.0	RQ:41		<input type="button" value="Edit"/>	
Module 2	Not Covered	No Tasks	2 - High	Requested	System Administrator	Package	2.0	RQ:42		<input type="button" value="Edit"/>	
System should allow administrators to setup notifications	Not Covered	No Tasks	2 - High	Requested	System Administrator	User Story	2.0	RQ:43		<input type="button" value="Edit"/>	

Now that we have a list of prioritized, estimated requirements, the next task is to enter in our planned list of releases and iterations for the project.

3. Create the Release and Iteration Plan

Click on the Planning > Releases menu option to display the project's release list page:

Requirements / Planning Board / Releases / Documents												Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>												
Displaying 0 out of 0 release(s) for this project.												
Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit	
		.. Any Any Any Any ..	RL	<input type="button" value="Edit"/>	

Initially the release list will be empty. Click on the “Insert” button in the main toolbar to enter the following releases in turn:

- Release 1.0 – version number 1.0.0.0

- Start Date: Today's Date
- End Date: Today's Date + 2 months
- Release 1.1 – version number 1.1.0.0
 - Start Date: Today's Date + 2 months
 - End Date: Today's Date + 4 months

You should now have a list of releases that looks like the following:

Requirements / Planning Board / Releases / Documents													Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="Delete"/> <input type="button" value="Indent"/> <input type="button" value="Outdent"/> <input type="button" value="Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>													
Displaying 0 out of 0 release(s) for this project.													
▼ %	Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit	
	Release 1.0	1.0.0.0	No Tests	No Tasks	31-May-2016	31-Jul-2016	352.0h		Major Release	Planned	RL:20	<input type="button" value="Edit"/>	
	Release 1.1	1.1.0.0	No Tests	No Tasks	1-Aug-2016	30-Sep-2016	360.0h		Major Release	Planned	RL:21	<input type="button" value="Edit"/>	

Now that we have the releases defined, we need to add one additional level of detail to each release – the list of *iterations* or *sprints* that will take place in each release. We shall enter in some sample iterations for the first release only.

Select the checkbox for the second release (Release 1.1) and choose the menu option Insert > New Iteration. A new iteration will be inserted between Release 1.0 and Release 1.1. Choose a name for the iteration, specify the date-range for the iteration, and click 'Update'. Now repeat this process twice and you should now have three iterations added to the list. We recommend making each iteration last 2-weeks and have each one scheduled in series:

Requirements / Planning Board / Releases / Documents													Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="Delete"/> <input type="button" value="Indent"/> <input type="button" value="Outdent"/> <input type="button" value="Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>													
Displaying 5 out of 5 release(s) for this project.													
▼ %	Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit	
	Release 1.0	1.0.0.0	No Tests	No Tasks	31-May-2016	31-Jul-2016	352.0h		Major Release	Planned	RL:20	<input type="button" value="Edit"/>	
	Release 1.0-Iteration 1	1.0.0.0001	No Tests	No Tasks	31-May-2016	30-Jun-2016	184.0h		Iteration	Planned	RL:22	<input type="button" value="Edit"/>	
	Release 1.0-Iteration 2	1.0.0.0002	No Tests	No Tasks	31-May-2016	30-Jun-2016	184.0h		Iteration	Planned	RL:23	<input type="button" value="Edit"/>	
	Release 1.0-Iteration 3	1.0.0.0003	No Tests	No Tasks	31-May-2016	30-Jun-2016	184.0h		Iteration	Planned	RL:24	<input type="button" value="Edit"/>	
	Release 1.1	1.1.0.0	No Tests	No Tasks	1-Aug-2016	30-Sep-2016	360.0h		Major Release	Planned	RL:21	<input type="button" value="Edit"/>	

Finally, to indent the three iterations under the parent release, select the checkboxes of the three iterations and click the 'Indent' button. You should now have a release hierarchy that looks like:

Requirements / Planning Board / Releases / Documents													Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="Delete"/> <input type="button" value="Indent"/> <input type="button" value="Outdent"/> <input type="button" value="Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>													
Displaying 5 out of 5 release(s) for this project.													
▼ %	Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	Status	ID	Edit	
	Release 1.0	1.0.0.0	No Tests	No Tasks	31-May-2016	31-Jul-2016	352.0h		Major Release	Planned	RL:20	<input type="button" value="Edit"/>	
	Release 1.0-Iteration 1	1.0.0.0001	No Tests	No Tasks	31-May-2016	30-Jun-2016	184.0h		Iteration	Planned	RL:22	<input type="button" value="Edit"/>	
	Release 1.0-Iteration 2	1.0.0.0002	No Tests	No Tasks	31-May-2016	30-Jun-2016	184.0h		Iteration	Planned	RL:23	<input type="button" value="Edit"/>	
	Release 1.0-Iteration 3	1.0.0.0003	No Tests	No Tasks	31-May-2016	30-Jun-2016	184.0h		Iteration	Planned	RL:24	<input type="button" value="Edit"/>	
	Release 1.1	1.1.0.0	No Tests	No Tasks	1-Aug-2016	30-Sep-2016	360.0h		Major Release	Planned	RL:21	<input type="button" value="Edit"/>	

Finally, we need to specify the number of resources that will be assigned to each iteration and release. To do that, click on the "Show/Hide Columns" dropdown list and Show the "# Resources" column. To make room you can hide the "Iteration?" column. Once the column is visible, select the checkboxes for "Release 1.0" and click the Bulk Edit button again. Now you should be able to adjust the # resources for the release and its iterations to 2. Then click Update:

Requirements / Planning Board / Releases / Documents														Role: Project Owner
<input type="button" value="+ Insert"/> <input type="button" value="x Delete"/> <input type="button" value="→ Indent"/> <input type="button" value="← Outdent"/> <input type="button" value="↻ Refresh"/> <input type="button" value="-- Show Level ---"/> <input type="button" value="▼ Filter"/> <input type="button" value="Edit"/> <input type="button" value="Tools"/> <input type="button" value="-- Show/hide columns --"/>														
Displaying 5 out of 5 release(s) for this project.														
✓ %	Name	Version #	Test Coverage	Progress	Start Date	End Date	Plan Effort	Task Effort	Type	# Resources	Status	ID	Edit	
		-- Any --	-- Any --							-- Any --		-- Any --		
	Release 1.0	1.0.0.0	No Tests	No Tasks	31-May-2016	31-Jul-2016	704.0h		Major Release	2	Planned	RL:20	<input type="button" value="Edit"/>	
	Release 1.0 - Iteration 1	1.0.0.0001	No Tests	No Tasks	31-May-2016	30-Jun-2016	368.0h		Iteration	2	Planned	RL:22	<input type="button" value="Edit"/>	
	Release 1.0 - Iteration 2	1.0.0.0002	No Tests	No Tasks	31-May-2016	30-Jun-2016	368.0h		Iteration	2	Planned	RL:23	<input type="button" value="Edit"/>	
	Release 1.0 - Iteration 3	1.0.0.0003	No Tests	No Tasks	31-May-2016	30-Jun-2016	368.0h		Iteration	2	Planned	RL:24	<input type="button" value="Edit"/>	
	Release 1.1	1.1.0.0	No Tests	No Tasks	1-Aug-2016	30-Sep-2016	360.0h		Major Release	1	Planned	RL:21	<input type="button" value="Edit"/>	
Show:	15	rows per page	Displaying page 1 of 1											

The screen now shows that the Plan Effort for each of the iterations has been doubled. This is the amount of time that you have available to allocate.

4. Adding Requirement Tasks

Now that we have defined the macro-schedule for Release 1.0, the next stage is to have the developers take each of the requirements defined so far and define the various tasks that will need to be carried out to develop the functionality outlined in the requirement. Each task will have its own estimate associated with it. In addition, you can optionally specify date-ranges and priorities to each of the individual tasks.

To start adding tasks, click on Planning > Requirements to display the requirements list. Now, click on the hyperlink for the first requirement ("System must allow entry of users") and the requirements details page will be displayed:

The screenshot shows the Requirements Details page for a requirement titled "System must allow entry of users". The requirement is identified as [RQ:187] and is categorized as a User Story. The page includes a sidebar showing the requirement's location in the hierarchy under Functional Requirements, Module 1, and System must allow entry. The main content area displays the requirement details across several tabs: Overview, Test Coverage, Tasks, Attachments, History, and Associations. Under the Overview tab, the requirement is listed as a Release with no specific date assigned. Properties include Importance set to 1 - Critical and Component set to none. Dates and Times show the creation date as 1/30/2018 5:47:31 PM and the last update as 1/30/2018 9:28:55 PM. An Estimate (points) field shows 15 hours at 12.00. The Tasks tab is visible at the bottom of the main content area.

Notice that the system displays an initial resource estimate of 12.00 hours for this requirement. This is simply based on an initial project setting of 8 hours per story point. Once you start adding tasks and getting metrics based on the actual team velocity (how many story points they can accomplish in a given time frame), the system can update that conversion metric.

Now click on the "Tasks" tab to display the list of tasks defined for this requirement:

Initially the list of tasks will be empty. Before entering the tasks, first click on the “Show/Hide Columns” dropdown list and show the “Show Est. Effort” column. This will display the estimated effort for each Task.

Now, click on the “New Task” button to add a new task associated with this requirement:

Enter the name of the task “Create user data tables” and the estimated effort 10.0h and click Update. The new task should now have been added:

Now we need to add the remaining tasks; the following table outlines all the tasks that need to be added under each of the requirements (we have included the one already created for completeness):

Requirement / Task	Est. Estimate
System must allow entry of users	
Create user data tables	10.0h
Develop user business object	10.0h
Build user creation screens	20.0h
System must allow the modification of users	
Extend user business object to handle updates	5.0h
Add user list page	15.0h
Add user details page	20.0h

Add user permissions page	15.0h
System must allow the deletion of users	
Extend user business object to handle deletes	5.0h
Update user list page to add delete functionality	10.0h
System should allow administrators to setup notifications	
Create user administration home page	15.0h
Add user settings for notifications to database	10.0h
Create user notifications administration page	20.0h

You should now have the following requirements list page:

Name	Test Coverage	Progress	Importance	Status	Release	Task Effort	Type	Estimate	ID	Edit
Functional Requirements	Not Covered			Planned	155.0h	Package	6.5	RQ:37		Edit
Module 1	Not Covered		1-Critical	Planned	110.0h	Package	4.5	RQ:38		Edit
System must allow entry of users	Not Covered		1-Critical	Planned	40.0h	User Story	1.5	RQ:39		Edit
System must allow the modification of users	Not Covered		1-Critical	Planned	55.0h	User Story	2.0	RQ:40		Edit
System must allow the deletion of users	Not Covered		3-Medium	Planned	15.0h	User Story	1.0	RQ:41		Edit
Module 2	Not Covered		2-High	Planned	45.0h	Package	2.0	RQ:42		Edit
System should allow administrators to setup notifications	Not Covered		2-High	Planned	45.0h	User Story	2.0	RQ:43		Edit

Note that we've hidden the "Author" field and shown the "Task Effort" field to show the detailed task effort aggregated up to the parent requirements.

Now when we add new requirements, it would be nice if the system would use this updated information when determining the estimated number of hours to deliver requirements with a specified number of story points. To update the metric the system uses, go to the dropdown menu to the right of the "S" logo and select Administration > Planning> Planning Options:

Planning Options Sample Application Two

General

Work Hours Per Day: * 8 hours

Work Days Per Week: * 5 days

Non-Working Hours Per Month: * 0 hours

Effort Calculations: *

Include Task Effort

Include Incident Effort

Include Test Case Effort

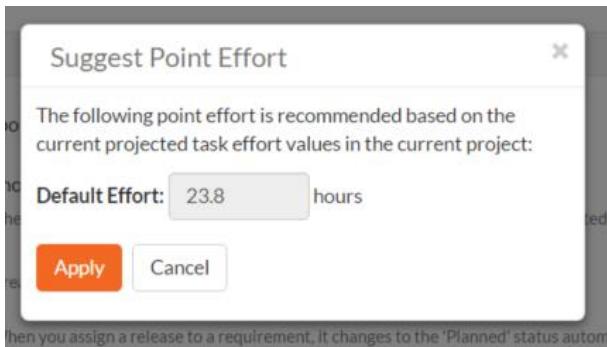
Requirements

Default Estimate: 1.0 points

Point Effort: 8.0 hours

This is the conversion factor used to determine the number of person-hours per estimated point.

As you can see, the system lists 8.0 hours as the current number of hours required to deliver a single story point of functionality. Now that we have some actual tasks in the project, click on the "Suggest" button to have the system provide its suggestion of the new metric:



Click the ‘Apply’ button to update the planning metric, and then click the main ‘Save’ button to confirm the change.

5. Adding the Test Cases

Click on the Testing > Test Cases menu option to display the project’s test case list page:

Initially the test case list will be empty and the only folder visible in the folder tree on the left hand side will be “root”. Click on the “Add” button underneath the folder tree on the left, enter the new folder name “Functional Tests” and click the ‘Save’ button. You now should have a new folder in the tree view, and after clicking the “Refresh” button above the list on the right, you will see a single folder:

Now click on this folder from the folder tree on the left, and click “New Test Case” from the main toolbar. Enter the name of the new test case:

- Test ability to add new users

and click “Save”. Now repeat this for the following other test cases:

- Test ability to edit existing users
- Test ability to delete existing users
- Test ability to edit notifications

You should now have the following test case list:

Functional Tests										
Name	Execution Status	Owner	Last Executed	Author	Status	Type	ID	Edit		
Test ability to add new users	Not Run	System Administrator	Draft	Functional	TC:23			Edit		
Test ability to edit existing users	Not Run	System Administrator	Draft	Functional	TC:24			Edit		
Test ability to delete existing users	Not Run	System Administrator	Draft	Functional	TC:25			Edit		
Test ability to edit notifications	Not Run	System Administrator	Draft	Functional	TC:26			Edit		

The next step will be to enter the detailed test steps and assign the test cases to the appropriate requirements that we previously entered.

Click on the hyperlink for the first test case “Test ability to add new users”. This will bring up the test case details page:

Test Case [TC:184] Status: Draft Operations Execution Status Not Run

People Properties Dates and Times

Description

In the Description box, enter a brief overview of the test case (e.g. “this test case verifies that you can add new users to the system and that all of the fields get saved correctly.”). In the “Test Steps” section, you will see a single test step is already automatically created for you with some suggested text:

Test Steps						
<input type="button" value="Insert Step"/> <input type="button" value="Insert Link"/> <input type="button" value="Refresh"/> <input type="button" value="Clone"/> <input type="button" value="Import"/> <input type="button" value="Delete"/> <input type="button" value="-- Show/hide columns --"/>						
Step #	Description	Expected Result	Sample Data	Execution Status	ID	Edit
Step_1	New Test Case	Works as expected.	Not Run	TS:48		Edit
Showing 15 rows per page						

Enter the following three test steps (click on the ‘Insert Step’ link twice to add two more new test steps):

Test Step Description	Expected Result	Sample Data
Click on the link to add new user	New user screen displayed	
Enter the name, email address and password of the new user.	Data accepted	Fred Bloggs fredblogs@aol.com
Click the ‘Submit’ button to create the user.	The user is created	

After the first two, click the 'Insert' button to commit the change and add another row. After the third and final test step, click the 'Save' button to commit the change.

You should now have the following test steps in the test case:

Test Steps						
		Description	Expected Result	Sample Data	Execution Status	ID
<input type="checkbox"/>	 Step_1	Click on the link to add new user	New user screen displayed		Not Run	TS:48
<input type="checkbox"/>	 Step_2	Enter the name, email address and password of the new user.	Data accepted	Fred Bloggs fredblogs@aol.com	Not Run	TS:52
<input type="checkbox"/>	 Step_3	Click the 'Submit' button to create the user.	The user is created		Not Run	TS:53

Now we need to link this test case to the requirement(s) that it validates. To do this, click on the "Req. Coverage" tab:

Test ability to add new users						
Test Case [TC:184] Status: Draft Operations						
Overview Req. Coverage Test Runs Releases Incidents Attachments Test Sets Tasks History						
+ Add	x Remove	Refresh	Filter			
Displaying 1 - 0 out of 0 association(s).						
<input checked="" type="checkbox"/> Type	Name	Status	Importance	Project Name	ID	RQ
<input type="checkbox"/> -- Any --		<input type="checkbox"/> -- Any --				
Show 15	rows per page					
« « Displaying page 1 » » of 0 »»»						

Click on the '+ Add' button to display the association adding panel:

Test Case [TC:184] Requirements						
Overview Req. Coverage Test Runs Releases Incidents Attachments Test Sets Tasks History						
Current Project: All Packages <input style="width: 200px;" type="text" value="Filter by name, or search by ID (e.g. RQ:4)"/> Search						
<input checked="" type="checkbox"/> ID	Name			Project		
<input type="checkbox"/> RQ:185	Functional Requirements			Sample Application Two		
<input type="checkbox"/> RQ:186	Module 1			Sample Application Two		
<input type="checkbox"/> RQ:187	System must allow entry of users			Sample Application Two		
<input type="checkbox"/> RQ:188	System must allow the modification of users			Sample Application Two		
<input type="checkbox"/> RQ:189	System must allow the deletion of users			Sample Application Two		
<input type="checkbox"/> RQ:190	Module 2			Sample Application Two		
<input type="checkbox"/> RQ:191	System should allow administrators to setup notifications			Sample Application Two		
Save Cancel				+ Create Requirement From This Test Case		

Choose the "System must allow the entry of users" requirement. Now click on the 'Save' button to add the test case to this requirement:

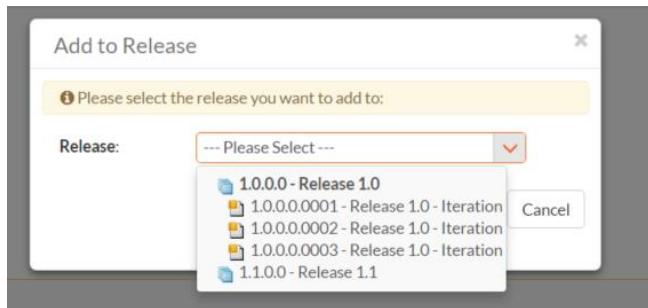
The screenshot shows a table listing requirements. One requirement, "System must allow entry of users", is selected and linked to a test case named "Test ability to add new users". The test case has a status of "Planned" and is categorized under "1 - Critical".

Type	Name	Status	Importance	Project Name	ID
-- Any --		-- Any --	-- Any --	-- Any --	RQ
Feature	System must allow entry of users	Planned	1 - Critical	Sample Application Two	RQ1B7

Now repeat the process for the other test cases, adding a couple of test steps for each one and linking the test cases to the requirements according to this table:

Test Case	Requirement
Test ability to add new users	System must allow entry of users
Test ability to edit existing users	System must allow the modification of users
Test ability to delete existing users	System must allow the deletion of users
Test ability to edit notifications	System should allow administrators to setup notifications

Now that we have our test cases entered and test coverage established, we need to specify which releases and iterations they can be tested in. To do that, first navigate to the project's test case list page again. Next, you need to select all of the contents of the "Functional Tests" folder. To do so you can put a checkbox in the box to the left of the folder name. Alternatively, you can click on the folder to show its contents. To quickly select all the test cases shown in the folder, you can check the checkbox in the header row of the table. Once the right selection has been made, click on Tools > Add to Release:



Now select "Release 1.0" and click "Add". You will now have added all the tests to the overarching Release. To add the tests to the different iterations, simply select the checkboxes of the different tests and then choose the Tools > Add to Release and add the individual tests to the appropriate iterations:

Test Case	Iteration(s)
Test ability to add new users	Release 1.0 - Iteration 1 Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to edit existing users	Release 1.0 - Iteration 1 Release 1.0 - Iteration 2 Release 1.0 - Iteration 3

Test ability to delete existing users	Release 1.0 - Iteration 2 Release 1.0 - Iteration 3
Test ability to edit notifications	Release 1.0 - Iteration 3

As illustrated, you typically want to include previous functionality in each of the successive iterations to ensure regression coverage. So, each iteration includes all the new test cases for the additional requirements, plus the existing test cases for the pre-existing functionality.

6. Planning the Iteration

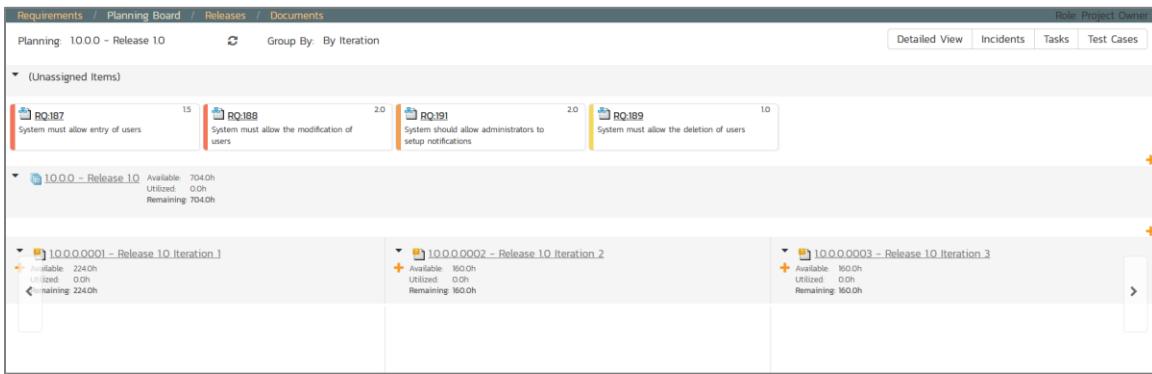
Now that the developers have elaborated each of the requirements to include the necessary tasks, the next step is to scope out the plan for each iteration / sprint. Click on the Planning > Planning Board option on the main menu to display the product backlog planning board. Make sure the “Group By” dropdown on the left is set to “By Priority”:

The screenshot shows the Inflectra Requirements Management software's Planning Board. The top navigation bar includes 'Sample Application Two', 'Search', 'Planning', 'Testing', 'Tracking', and 'Reporting'. A 'System Administrator' dropdown is on the right. The main area has tabs for 'Requirements', 'Planning Board', 'Releases', and 'Documents'. A 'Planning' dropdown shows 'Product Backlog' and a 'Group By' dropdown set to 'By Priority'. Below this, a tree view shows requirement items categorized by priority: '1 - Critical', '2 - High', '3 - Medium', and '4 - Low'. Each category contains specific requirements like RQ:187, RQ:188, RQ:189, and RQ:190, each with a brief description and a progress bar indicating completion status.

Now to view the iteration plan for a specific release, select ‘Release 1.0’ and ‘Group by Priority’ from the drop-down menus at the top-left of the screen. That will display the iteration plan for the selected release:

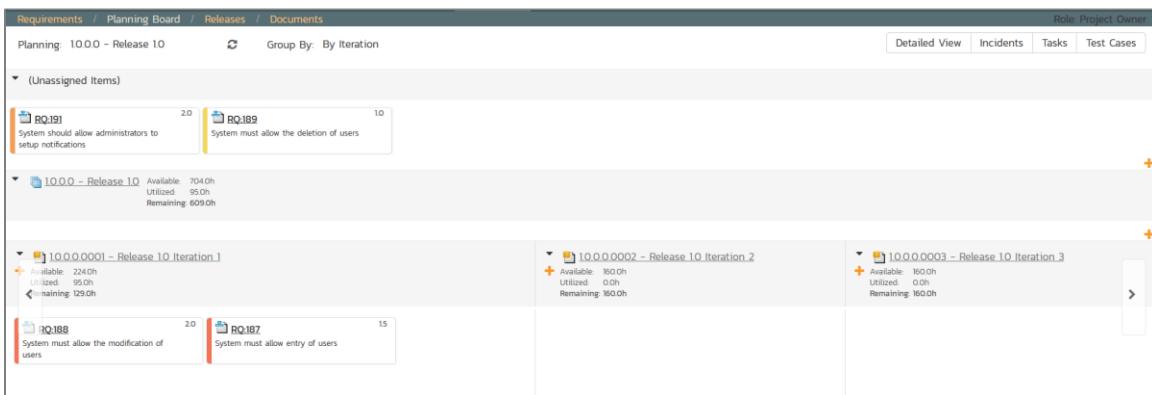
This screenshot shows the same Planning Board interface, but with the 'Group By' dropdown set to 'By Iteration'. The main area now displays the iteration plan for 'Release 1.0'. It shows three iterations: '10.0.0.0001 - Release 10 Iteration_1', '10.0.0.0002 - Release 10 Iteration_2', and '10.0.0.0003 - Release 10 Iteration_3'. Each iteration is shown with its available, utilized, and remaining hours. The requirement items from the previous screenshot are now listed under their respective iteration columns.

Expand the ‘(Unassigned Items)’ entry to display the requirements that are in the product backlog:

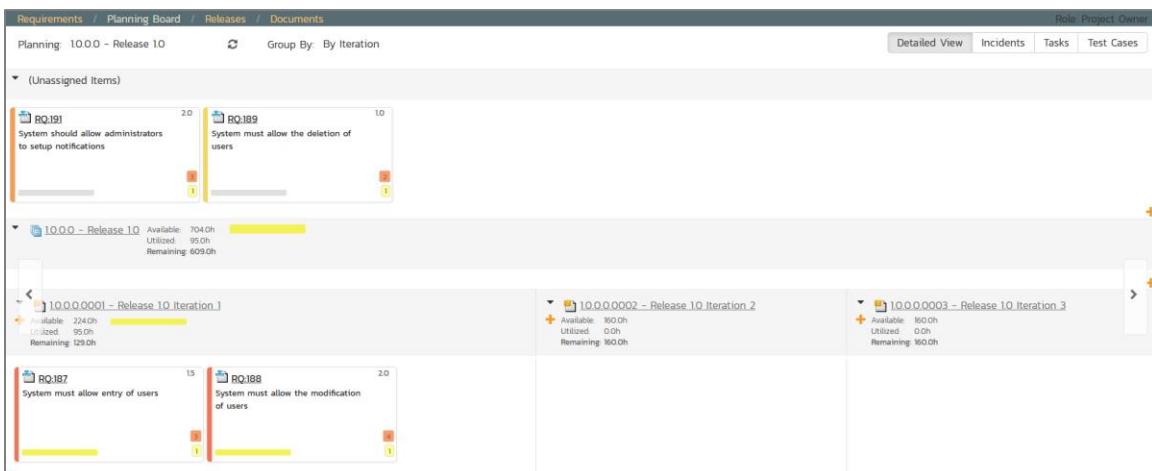


Each backlog item (requirement or incident) is represented by a virtual “story card” in the iteration. The left-hand side of each item displays the priority color and the progress bar at the bottom of each item depicts the progress of the item. You can flip through each iteration to see the work planned by clicking the left/right arrow buttons at the sides of the screen.

Now drag the two highest priority requirements (the ones with Importance = 1-Critical) to the first iteration:



If you would like to see more information about each requirement, simply enable the ‘Detailed View’ option:



To see the individual tasks associated with each requirement, you can also select the ‘Tasks’ option:

The screenshot shows a Requirements Planning Board interface. At the top, it says "Planning: 10.0.0 - Release 1.0" and "Group By: By Iteration". There are tabs for "Detailed View", "Incidents", "Tasks", and "Test Cases". The main area shows requirements RQ.189 and RQ.188 assigned to Release 1.0. Iteration 1 has 24 hours available, 95 utilized, and 129 remaining. Iteration 2 has 80 hours available, 0 utilized, and 160 remaining.

You can now determine how much time has been scheduled in the first iteration and how much time is remaining. Although we do have spare time available in Iteration 1 we will leave room left for fixing incidents, so next, drag and drop the remaining two requirements to the second iteration:

The screenshot shows the Requirements Planning Board after dragging requirement RQ.189 from Iteration 1 to Iteration 2. Iteration 1 now has 224 hours available, 95 utilized, and 129 remaining. Iteration 2 now has 160 hours available, 60 utilized, and 100 remaining.

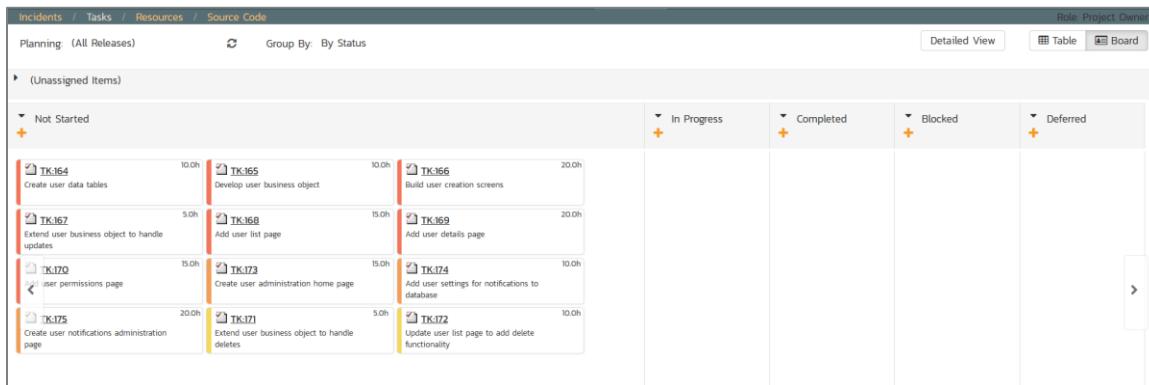
7. Assigning the Requirements & Tasks

Now that we have planned which requirements (user stories) and tasks are planned for each iteration, we can assign the individual tasks to the appropriate developer(s). The process you follow will depend on your methodology (e.g. in Scrum the developers simply pick the tasks, whereas in Extreme Programming the project manager will usually do the assignment).

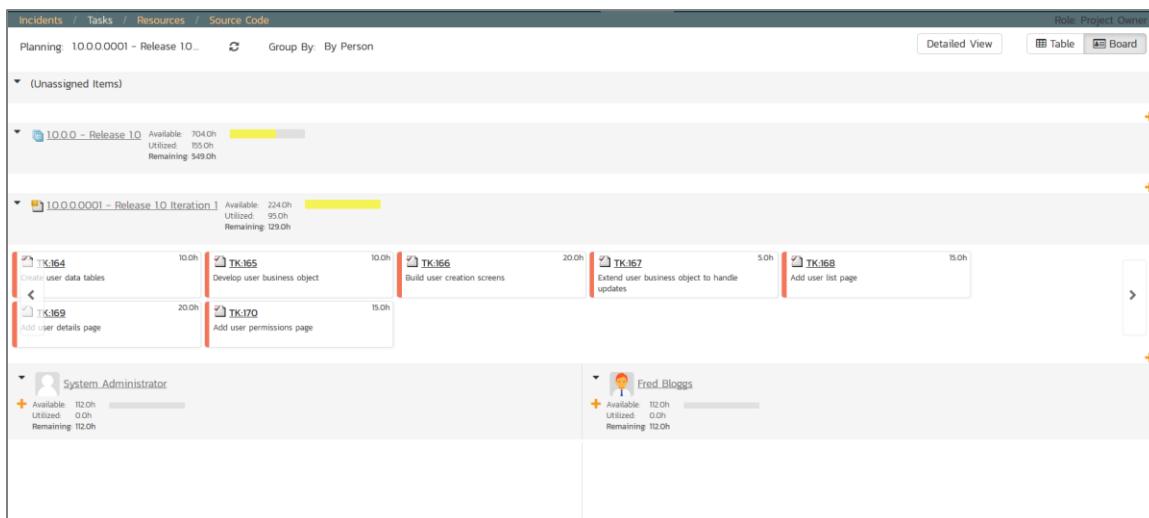
To assign the tasks, click on Tracking > Tasks to display the main tasks list page:

The screenshot shows the Tasks list page. It displays a grid of tasks with columns for Name, Progress, Status, Priority, Owner, Release, Est. Effort, ID, and Edit. A pie chart on the left indicates task status distribution: 38% On Schedule, 62% Not Started. The tasks listed include various user story items like "Create user data tables", "Develop user business object", etc., each with its corresponding status, priority, and assigned developer.

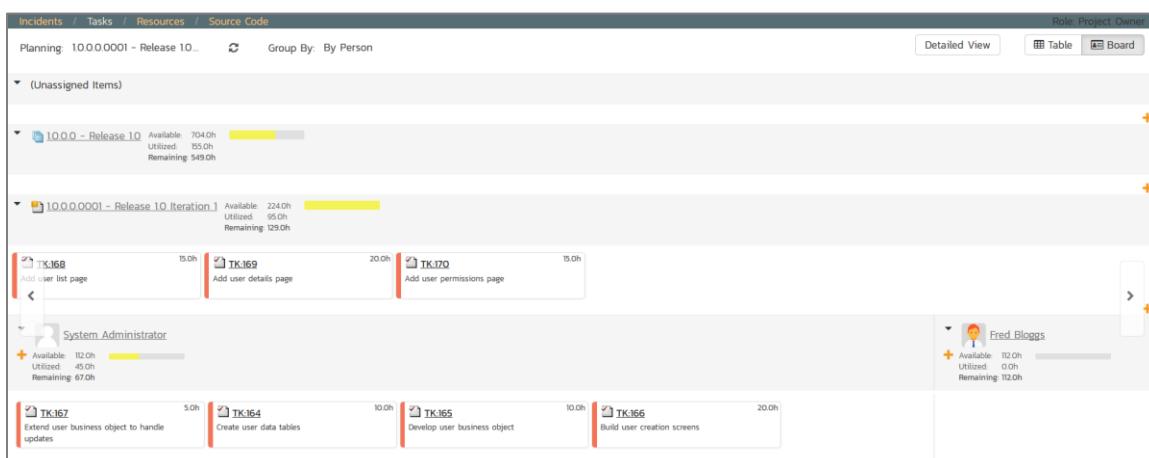
Click on the 'Board' option on the top-right of the screen to change to the Kanban board view:



You can see at a glance which tasks are in each status (in this case, they are all marked as 'not started'). To see the distribution of tasks by person for specific iteration, change the release selection to 'Release 1.0 Iteration 1', and the 'Group By' dropdown to 'By Person':



For our sample project we have two project members listed (included ourselves). As an example, select the first four tasks (which are all priority = 1 – Critical) and drag them to your user's section:



Now you can clearly see the four tasks that have been assigned to your user. To simulate how this would appear to a developer, click on the main SpiraTeam icon (in the top-left) to display your user's "My Page" dashboard:

My Projects

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Two	External Projects	30-Nov-2005

My Saved Searches

Name	Project

My Assigned Requirements

Name	Project	Importance	Status

My Assigned Test Cases

Name	Project	Status	Last Executed

My Assigned Test Sets

Name	Project	Due Date	Status

Quick Launch

Create Incident in: Sample Application Two [+ New](#)

My Contacts

Name	Department	Online	Operations

My Assigned Incidents

Name	Project	Type	Priority	Date Opened

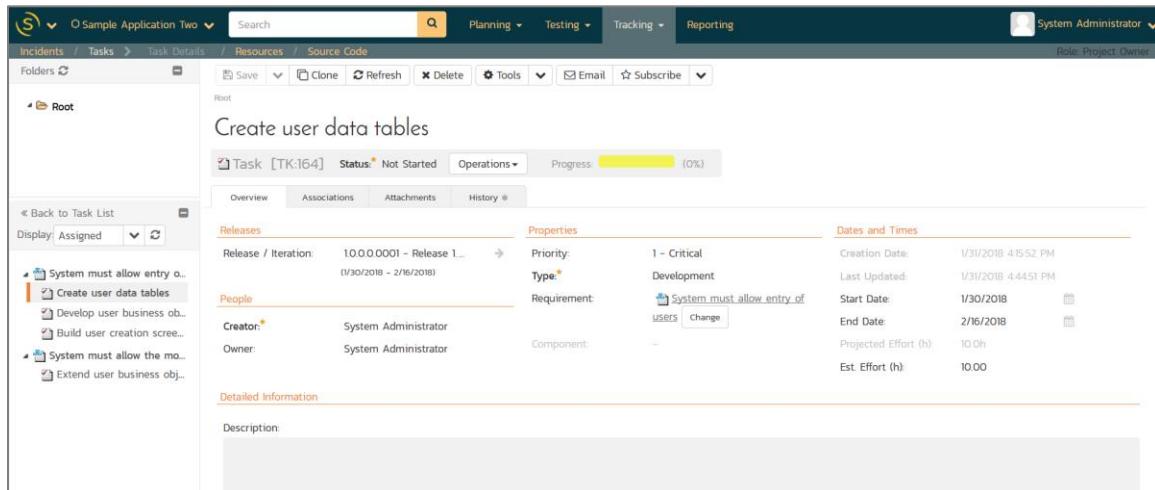
My Detected Incidents

Name	Project	Type	Priority	Date Opened

My Assigned Tasks

Name	Project	Progress	Priority	Due Date
1 Create User Data Tables	Sample Application T...	<div style="width: 100%;"> </div>	1 - Critical	30-Jun-2016
2 Develop user business obj...	Sample Application T...	<div style="width: 100%;"> </div>	1 - Critical	30-Jun-2016
3 Build user creation screens	Sample Application T...	<div style="width: 100%;"> </div>	1 - Critical	30-Jun-2016
4 Extend user business object to...	Sample Application T...	<div style="width: 100%;"> </div>	1 - Critical	30-Jun-2016

This page lists all the development tasks that have been assigned to your user. Click on the first task “Create user data tables” to display the task details page:



The screenshot shows the Inflectra System Manager interface with the following details:

- Project:** Sample Application Two
- Task ID:** TK:164
- Status:** Not Started
- Progress:** 0%
- Releases:** 1.0.0.0001 – Release 1 (1/30/2018 – 2/16/2018)
- Properties:**
 - Priority: 1 - Critical
 - Type: Development
 - Requirement: System must allow entry of users
 - Creator: System Administrator
 - Owner: System Administrator
 - Component: –
- Dates and Times:**
 - Creation Date: 1/31/2018 4:55:52 PM
 - Last Updated: 1/31/2018 4:44:51 PM
 - Start Date: 1/30/2018
 - End Date: 2/16/2018
 - Projected Effort (h): 10.0h
 - Est. Effort (h): 10.00
- Description:** (Empty)

This task has been estimated at 10.0 hours and is currently not started. The next step is to start working on the assigned task and report back progress. As an example, click the workflow operation “Start Task”, then enter an actual effort of 3.0 hours, a remaining effort of 5.0 hours and add a comment “Added initial set of data tables”. Upon clicking ‘Save’, the progress indicator will reflect the changes and the new comment will have been added to the list:

Create user data tables

Task [TKI64] Status: In Progress Operations Progress: (50%)

Successfully Saved Changes to Task

Releases	Properties	Dates and Times
Release / Iteration: 1.0.0.0001 – Release 1... (1/30/2018 – 2/16/2018)	Priority: 1 - Critical Type: Development Requirement: System must allow entry of users Change Component: –	Creation Date: 1/31/2018 4:15:52 PM Last Updated: 1/31/2018 4:47:08 PM Start Date: 1/30/2018 End Date: 2/16/2018 Projected Effort (h): 8.0h Est. Effort (h): 10.00 Actual Effort (h): 3.00 Remaining Effort (h): 5.00
People		
Creator: System Administrator Owner: System Administrator		
Detailed Information		
Comments		
Displaying newest first oldest first		
0 minute ago System Administrator Added initial set of data tables.		

Now click on the other three assigned tasks, start them, and specify the following:

Requirement / Task	Est. Estimate	Actual Effort	Remaining Effort
Create user data tables	10.0h	3.0h	5.0h
Develop user business object	10.0h	2.0h	7.5h
Build user creation screens	20.0h	3.0h	18.0h
Extend user business object to handle updates	5.0h	0.5h	4.0h

After updating the assigned tasks, the ‘My Page’ dashboard will now reflect the changes:

My Page System Administrator

Modify Layout/Settings + Add Items All Projects Current Project

My Projects

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Two	External Projects	30-Nov-2005

My Saved Searches

Name	Project

My Assigned Requirements

Name	Project	Importance	Status

My Assigned Test Cases

Name	Project	Status	Last Executed

My Assigned Test Sets

Name	Project	Due Date	Status

Quick Launch

Create Incident in: Sample Application Two

My Contacts

Name	Department	Online	Operations

My Assigned Incidents

Name	Project	Type	Priority	Date Opened

My Detected Incidents

Name	Project	Type	Priority	Date Opened

My Assigned Tasks

Name	Project	Progress	Priority	Due Date
Create User Data Tables	Sample Application T...		1 - Critical	30-Jun-2016
Develop user business object	Sample Application T...		1 - Critical	30-Jun-2016
Build user creation screens	Sample Application T...		1 - Critical	30-Jun-2016
Extend user business object to handle updates	Sample Application T...		1 - Critical	30-Jun-2016

Similarly, for the project manager, clicking on Planning > Requirements to display the requirements list will show the task progress as it impacts the various requirements:

Requirement List											
Name	Test Coverage	Progress	Importance	Status	Release	Task Effort	Type	Estimate	ID	Edit	
Functional Requirements	0%	0%	0%	In Progress	155.0h	Package	6.5	RQ:37	Edit		
Module 1	0%	0%	1 - Critical	In Progress	110.0h	Package	4.5	RQ:38	Edit		
System must allow entry of users	0%	0%	1 - Critical	In Progress	1.0.0.0001	40.0h	User Story	1.5	RQ:39	Edit	
System must allow the modification of users	0%	0%	1 - Critical	In Progress	1.0.0.0001	55.0h	User Story	2.0	RQ:40	Edit	
System must allow the deletion of users	0%	0%	3 - Medium	Planned	1.0.0.0002	15.0h	User Story	1.0	RQ:41	Edit	
Module 2	0%	0%	2 - High	Planned	45.0h	Package	2.0	RQ:42	Edit		
System should allow administrators to setup notifications	0%	0%	2 - High	Planned	1.0.0.0002	45.0h	User Story	2.0	RQ:43	Edit	

8. Scheduling the Testing Activities

Now that we have created our test plan for each release and iteration we now want to schedule the test cases for execution by our testers. As an example, we'll create a single test set (also known as test suites) that contains a list of test cases to be executed by a specific tester.

Click on the Testing > Test Sets menu option to display the project's test set list page:

Test Set List											
Name	Execution Status	Planned Date	Release	Last Executed	Owner	Status	ID	TX	Edit		
Root	Not Started	2018-01-01	1.0.0.0001	2018-01-01	Administrator	Not Started	TX:1	Edit			

Initially the test set list will be empty and the folder tree on the left will only show "root". Click on the "Add" button beneath the folder tree, enter the new folder name "Test Cycle #1" and click the 'Add' button.

Select that folder from the folder tree. After clicking 'Refresh' on the main toolbar, you now should have a single folder in the list on the right hand side:

Test Set List											
Name	Execution Status	Planned Date	Release	Last Executed	Owner	Status	ID	TX	Edit		
Root	Not Started	2018-01-01	1.0.0.0001	2018-01-01	Administrator	Not Started	TX:1	Edit			
Test Cycle #1	Not Started	2018-01-01	1.0.0.0001	2018-01-01	Administrator	Not Started	TX:2	Edit			

Now click on the folder and then click on the "New Test Set" from the main toolbar. Enter the name of the new test set "Testing new functionality" and click Save. You should now have the following test set list:

Test Set List											
Name	Execution Status	Planned Date	Release	Last Executed	Owner	Status	ID	TX	Edit		
Root	Not Started	2018-01-01	1.0.0.0001	2018-01-01	Administrator	Not Started	TX:1	Edit			
Test Cycle #1	Not Started	2018-01-01	1.0.0.0001	2018-01-01	Administrator	Not Started	TX:2	Edit			
Testing new functionality	Not Started	2018-01-01	1.0.0.0002	2018-01-01	Administrator	Not Started	TX:8	Edit			

Click on the hyperlink for the test set to bring up the test set details page:

The screenshot shows the 'Test Set' configuration page. At the top, it displays 'Testing new functionality' under 'Test Cycle #1'. Below this, there are tabs for 'Overview', 'Test Runs', 'Attachments', 'Incidents', and 'History'. The 'Properties' section includes fields for Owner (None), Creator (System Administrator), Release (None), Type (Manual), Automation Host (None), Configuration (None), Creation Date (1/30/2018 8:36:47 PM), Last Executed (None), Last Updated (1/30/2018 8:36:50 PM), Planned Date (None), Recurrence (One Time), Schedule on Build (No), and Post-Build Delay (None). The 'Detailed Information' section contains a 'Description' field which is currently empty.

The first task is to add the appropriate test cases to this set. To do this, click on the “Add” button in the “Test Cases” section half way down the page to bring up the following dialog box:

The screenshot shows the 'Test Cases' dialog box. It has a search bar at the top with 'Current Project' and 'Root' dropdowns, and a 'Search' button. Below the search bar, it says 'No available matches found.' There are 'Save' and 'Cancel' buttons. At the bottom, there are buttons for '+ Add', 'Remove', 'Refresh', 'Edit Parameters', 'Show/hide columns', 'Execute Tests', and filters for 'Est. Dur.', 'Act. Dur.', 'Owner', 'Priority', 'Last Executed', 'Type', 'Execution Status', and 'ID'. A pagination control at the bottom right shows 'Displaying page 1 of 0'.

Choose the ‘Functional Tests’ folder and the test cases in that folder will be displayed:

The screenshot shows the 'Test Cases' dialog box with 'Functional Tests' selected in the 'Project' dropdown. It lists four test cases: TC184 (Test ability to add new users), TC182 (Test ability to delete existing users), TC181 (Test ability to edit existing users), and TC183 (Test ability to edit notifications). Each test case has a checkbox next to its name. The 'Project' column shows they are all assigned to 'Sample Application Two'. There are 'Save' and 'Cancel' buttons at the bottom.

Select the following test cases and click the ‘Add’ button:

- Test ability to add new users
- Test ability to edit existing users

You should now have the following displayed:

The screenshot shows the 'Test Set [TX:16]' configuration page. The 'Properties' section includes fields for Owner (System Administrator), Creator (System Administrator), Release (10.0.0.0001 - Release 1.0), Type (Manual), Automation Host, Configuration, Creation Date (1/30/2018 8:36:47 PM), Last Executed, Last Updated (1/30/2018 8:55:55 PM), Planned Date (01/30/2018 8:55 PM), Recurrence (One Time), Schedule on Build (No), and Post-Build Delay (s). The 'Test Cases' section lists two entries:

Test Case Name	Owner	Priority	Est. Dur.	Act. Dur.	Last Executed	Type	Execution Status	ID	Edit
Test ability to add new users						Functional	Not Run	TC:1B4	<button>Edit</button>
Test ability to edit existing users						Functional	Not Run	TC:1B1	<button>Edit</button>

The next step is to assign this test set to a specific release/iteration and to a particular tester. To do that, choose the following values for the following fields and click ‘Save’:

- Owner = System Administrator (your user)
- Release = Release 1.0 - Iteration 1
- Planned Date = (Today’s Date).

You have now scheduled this test set to be executed by your user by the end of today against the first iteration of release 1.0:

The screenshot shows the 'Test Set [TX:16]' configuration page after changes have been saved. A blue banner at the top states 'Successfully Saved Changes to Test Set'. The 'Properties' section remains the same as in the previous screenshot. The 'Test Cases' section also remains the same.

9. Running Tests and Logging Incidents

Now that you have scheduled the test set, if you go to the ‘My Page’ by clicking on the orange SpiraTeam application logo in the top-left, you’ll see your newly assigned test set down on the left:

My Projects

Project Name	Group	Creation Date
Library Information System	Internal Projects	30-Nov-2005
Sample Application One	Internal Projects	30-Nov-2005
Sample Application Two	External Projects	30-Nov-2005

My Saved Searches

Name	Project

My Assigned Requirements 

Name	Project	Importance	Status

My Assigned Test Cases 

Name	Project	Status	Last Executed

My Assigned Test Sets 

Name	Project	Due Date	Status
Testing new functionality	Sample Application T...	31-May-2016	Not Started

Quick LaunchCreate Incident In: Sample Application Two  **My Contacts**

Name	Department	Online	Operations

My Assigned Incidents 

Name	Project	Type	Priority	Date Opened

My Detected Incidents 

Name	Project	Type	Priority	Date Opened

My Assigned Tasks 

Name	Project	Progress	Priority	Due Date
Create User Data Tables	Sample Application T...	<div style="width: 80%; background-color: #2e6b2e; height: 10px;"></div>	1 - Critical	30-Jun-2016
Develop user business object	Sample Application T...	<div style="width: 60%; background-color: #2e6b2e; height: 10px;"></div>	1 - Critical	30-Jun-2016
Build user creation screens	Sample Application T...	<div style="width: 20%; background-color: #2e6b2e; height: 10px;"></div>	1 - Critical	30-Jun-2016
Extend user business object to...	Sample Application T...	<div style="width: 40%; background-color: #2e6b2e; height: 10px;"></div>	1 - Critical	30-Jun-2016

Click on the 'Execute' button (with the play icon) to the right of this new test set. That will start the test execution wizard:

Test Execution Wizard

Please Choose the Release and Custom Properties To Execute Against:

Release: * 1.0.0.0001 - Release 1.0 - Iteration 1

Build: -- None --

(Note: Any custom properties that are read-only have already been populated from the Test Set.)

[Cancel](#)[Next](#)

On the first screen, the release dropdown list will have been automatically pre-selected to the release/iteration specified in the test set, so just click the 'Next' button to move to the first test step in the first test case:

Testing new functionality Release 1.0.0.0001

Progress (0 / 4 Steps)

Test ability to add new users (TC 22)
 Step 1 Click on the link to add new user
 Step 2 Enter the name, email address and password of the new user.
 Step 3 Click the 'Submit' button to create the new user.

Test ability to edit existing users
 Step 1 New Test Case

Display: Split Table Mini

Pass Blocked Caution Fail N/A

Test ability to add new users (TC 22)
 this test case verifies that you can add new users to the system and that all of the fields get saved correctly.

Step 1 Click on the link to add new user
 Expected Result: New user screen displayed

Actual Result Attachments Incidents

Note that when you first visit this page, you will be shown a quick guided tour of how the page works.

As a tester, you can progress through each of the test steps in each test case in the test set in turn. For each test step you can enter **Pass**, **Fail**, **Blocked**, **Caution**, or **Not Applicable**. If you enter any status other than Pass you need to enter a value for the ‘Actual Result’. For a pass status, the Actual Result is optional.

First, click on the Pass button to pass the first test step. As soon as you do, the test will automatically progress to the second test step:

Testing new functionality Release 1.0.0.0001

Progress (1 / 4 Steps)

Test ability to add new users (TC 22)
 Step 1 Click on the link to add new user
 Step 2 Enter the name, email address and password of the new user.
 Step 3 Click the 'Submit' button to create the new user.

Test ability to edit existing users
 Step 1 New Test Case

Display: Split Table Mini

Pass Blocked Caution Fail N/A

Test ability to add new users (TC 22)
 this test case verifies that you can add new users to the system and that all of the fields get saved correctly.

Step 1 Click on the link to add new user
 Expected Result: Data accepted
 Sample Data: Fred Bloggs
fredblogs@aol.com

Actual Result Attachments Incidents

Now for the second test step, enter in the actual result field “Unable to enter the sample data as the fields were disabled”. Before clicking the Fail button we also want to enter in the following fields in the Incident form (accessed by clicking the “Incidents” tab):

- Name = Error displaying user fields
- Type = Bug
- Priority = 2 – High

Now click the Fail button and you will have recorded a test failure and a new incident/defect:

The screenshot shows a test case named "Testing new functionality" for "Release 1.0.0.00001". A progress bar indicates 2 out of 4 steps completed. Step 3 is currently being edited, showing a green "Pass" status. The "Actual Result" section contains a rich text editor with various toolbar options like bold, italic, and code.

Now that we have logged the test failure and the new incident/defect, if you click on the main “Sample Application Two” option on the top-navigation bar, you’ll be taken to the project homepage with the requirements and test case metrics now visible:

The Project Overview page displays several key metrics and charts:

- Project Overview:** Shows group (External Projects), web site, and owner (System Administrator).
- Requirements Summary:** A table showing requirement counts by priority:

Status	1 - Critical	2 - High	3 - Medium	4 - Low	(None)	TOTAL
Planned	2		1			3
In Progress	3				1	4
TOTAL	3	2	1		1	7
- Requirements Coverage:** A bar chart showing coverage levels: Passed (red), Failed (orange), Blocked (grey), Caution (light grey), Not Run (white), and Not Covered (white).
- Top Open Issues:** A table listing issues by description, priority, owned by, and date opened.
- Top Open Risks:** A table listing risks by description, priority, owned by, and date opened.
- Test Execution Status:** A bar chart showing execution status: Failed (red), Passed (orange), Not Run (grey), Blocked (light grey), and Caution (white). It also shows a daily run count of 1 on 5/31/2016.
- Release Test Summary:** A table showing release/iteration, number of tests, and execution status.

If you go to the Testing > Test Sets page, you also see the status of our test set:

The Test Sets page lists one test set named "Testing new functionality" under "Test Cycle #1". The table columns include Name, Execution Status, Planned Date, Release, Last Executed, Owner, Status, ID, and Edit. The test set is marked as In Progress with ID TX:8.

Name	Execution Status	Planned Date	Release	Last Executed	Owner	Status	ID	Edit
Testing new functionality	Failed	31-May-2016	1.0.0.0001	31-May-2016	System Administrator	In Progress	TX:8	Edit

If you go to the Planning > Requirements page, you’ll see the different requirements’ test coverage and the status of the tests associated with each requirement:

Requirements / Planning Board / Releases / Documents									Role: Project Owner																																																															
+ Insert		Delete	Indent	Outdent	Refresh	Show Level	Filter	Edit	Tools																																																															
-- Show/hide columns --																																																																								
Displaying 7 out of 7 requirement(s) for this project.										X																																																														
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Show 15 rows per page										Displaying page 1 of 1																																																														

The final step in the process is to triage the logged defect and assign it to a developer to be fixed.

10. Triaging Issues and Defects

Now that a new incident has been logged, the next step in the process is to review the incident and assign it to a developer to be fixed. First, click on the Tracking > Incidents menu item. This will display the incident list page for the project:

Incidents / Tasks / Resources / Source Code											Role: Project Owner																					
Planning / Testing / Tracking / Reporting											System Administrator																					
Quick Filter																																
(No filters available)																																
Displaying 1 - 1 out of 1 incidents(s) for this project.																																
<table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Status</th> <th>Priority</th> <th>Detected By</th> <th>Creation Date</th> <th>Owner</th> <th>Progress</th> <th>ID</th> <th>Edit</th> </tr> </thead> <tbody> <tr> <td>Error displaying user fields</td> <td>Bug</td> <td>New</td> <td>2 - High</td> <td>System Administrator</td> <td>30-Jan-2018</td> <td>IN</td> <td>Edit</td> <td>IN192</td> <td>Edit</td> </tr> </tbody> </table>													Name	Type	Status	Priority	Detected By	Creation Date	Owner	Progress	ID	Edit	Error displaying user fields	Bug	New	2 - High	System Administrator	30-Jan-2018	IN	Edit	IN192	Edit
Name	Type	Status	Priority	Detected By	Creation Date	Owner	Progress	ID	Edit																							
Error displaying user fields	Bug	New	2 - High	System Administrator	30-Jan-2018	IN	Edit	IN192	Edit																							
Show 15 rows per page										Displaying page 1 of 1																						

You can also view the same list of incidents in a Kanban board view:

Incidents / Tasks / Resources / Source Code											Role: Project Owner																													
Planning / Testing / Tracking / Reporting											System Administrator																													
Planning: (All Releases)																																								
Group By: By Status																																								
(Unassigned Items)																																								
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New	Assigned	Open	Closed	Duplicate	Not Reproducible	Resolved																																		
IN192																																								
Enter the name, email address and password of the user. Expected: Should be reported. Actual: Unable to enter the sample data.																																								
Detailed View Table Board																																								

In either view, click on the hyperlink for the new incident “Error displaying user fields”. This will display the incident details page:

The screenshot shows the Spira Incident Details page. At the top, there's a toolbar with Save, Clone, Refresh, Delete, Find, Tools, Email, and Subscribe buttons. The main title is "Error displaying user fields". Below the title, there's a sub-header "[IN:62] Incident". The page has several tabs: Overview (selected), Attachments, Associations, and History. Under the Overview tab, there are sections for Releases, Properties, and Dates and Times. The Properties section shows "Priority: 2 - High", "Severity: -- None --", and "Component: -- None --". The Dates and Times section shows "Creation Date: 4/18/2017 14:55:44 PM", "Last Updated: 4/18/2017 20:03:11 PM", and "Start Date:". There's also a "Projected Effort (h):" field. The "Description" section contains a placeholder "Description:" and instructions "Enter the name, email address and password of the new user".

Click on the “Assign Incident” option in the “Operations” dropdown underneath the large incident name near the top of the page. This will switch the status of the incident from New > Assigned. You now need to enter the following fields:

- Owner = System Administrator (your user)

Also add a new comment in the “Comments” section – “Assigning this to you to fix. Issue was found during testing.” Now click the Save button in the toolbar and the incident will be assigned to your user for fixing.

To simulate this process, go back to the “My Page” by clicking on the orange Spira icon in the top-left of the screen:

The screenshot shows the Spira "My Page" interface. At the top left is a "Quick Launch" section with a dropdown "Create Incident in: Sample Application Two" and a plus sign button. Below it is a "My Contacts" section with columns for Name, Department, Online, and Operations. At the bottom is a "My Assigned Incidents" section with a feed icon. It lists incidents with columns for Name, Project, Type, Priority, and Date Opened. One incident is highlighted: "Error displaying user fields" (Type: Bug, Priority: 2 - High, Date Opened: 18-Apr-2017).

You can now see that you've been assigned an incident under the “My Assigned Incidents” widget (on the right-hand side). Now click on the hyperlink for the incident to bring up the incident details page:

Error displaying user fields

The screenshot shows a bug incident details page. At the top, the status is "Assigned". The "Associations" tab is selected. In the "Properties" section, the "Priority" is listed as "2 - High". In the "Dates and Times" section, the "Creation Date" is "4/18/2017 1:45:54 PM". The "People" section shows "Detected By" and "Owner" both assigned to "System Administrator". There is a "Comments" section with one entry from "System Administrator" stating: "Assigning this to you to fix. Issue was found during testing".

You can see that the status has been changed to “Assigned” and the comment from the project manager is clearly visible. To help you reproduce the issue to be fixed, you can also click on the “Associations” tab to display the test run and requirements associated with this incident:

Error displaying user fields

The screenshot shows the "Associations" tab selected. It displays a list of 1 association. The first association is for a "Test Run" artifact type, titled "Test ability to add new users", which failed on 18-Apr-2017 by System Administrator. The second association is for a "Requirement" artifact type, titled "System must allow entry of users", which is requested on 18-Apr-2017 by System Administrator.

Type	Artifact Type	Artifact Name	Status	Creation Date	Creator	Comment	Project Name	ID	Edit
-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	-- Any --	Edit
Implicit	Test Run	Test ability to add new users	Failed	18-Apr-2017	System Administrator	Test Run: test ability to add new users	Sample Application Two	[TR:23]	Edit
Implicit	Requirement	System must allow entry of users	Requested	18-Apr-2017	System Administrator	Test Run: test ability to add new users	Sample Application Two	[RQ:39]	Edit

If you click on the test run hyperlink “Test ability to add new users”, you will see the detailed information about the test execution that resulted in the bug being logged:

The screenshot shows the Test Run Details page for a test run named "31-May-2016 (TR23)". The "Overview" tab is selected. In the "Details" section, the "Test Case #" field contains "Test ability to add new users [TC.23]". The "Execution Status" is "Failed". The "Test Steps" table has three rows:

Step	Test Step Description	Expected Result	Sample Data	Test # / Step #	Actual Result	Execution Status
1	Click on the link to add new user	New user screen displayed		TC23 / TS48		Passed
2	Enter the name, email address and password of the new user.	Data accepted	Fred Bloggs fredblogs@aol.com	TC23 / TS52	Unable to enter the sample data as the fields were disabled View Incidents 1	Failed
3	Click the 'Submit' button to create the user. The user is created			TC23 / TS53		Not Run

This allows the developer to retrace the steps taken by the tester and attempt to reproduce the issue. Assuming that we have been able to reproduce and fix the issue, we will now resolve the incident.

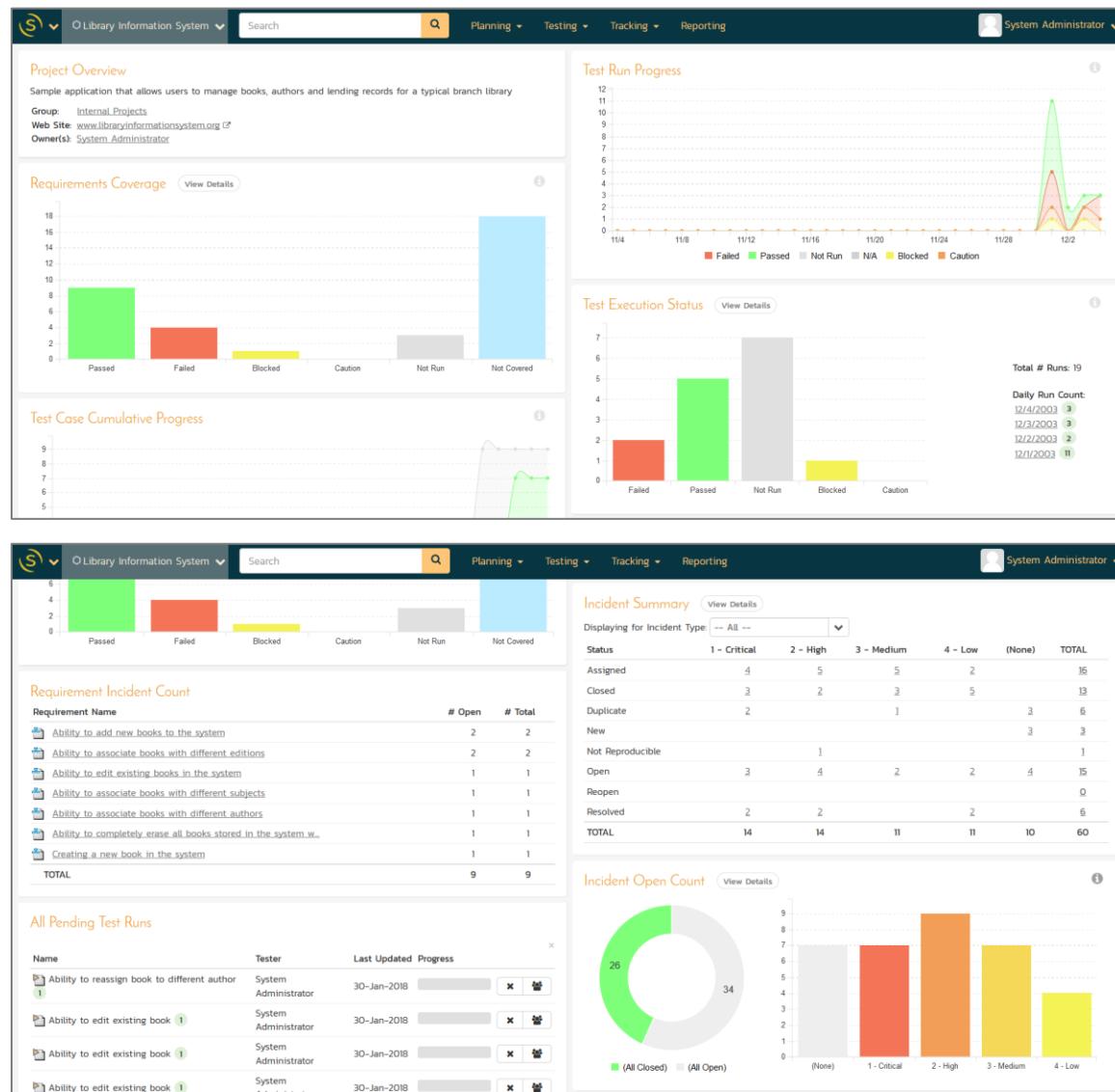
Back on the incident details screen, click on the workflow operation link “Resolve Incident”, fill in the following fields and click Save:

- Resolved Release = Release 1.0 - Iteration 2
- New Comment = “Fixed the incident.”

The incident will now change from Assigned > Resolved and an email will be sent to the tester letting them know that they need to retest the test case and close the incident.

11. Reviewing Your Project

You can check on the overall status of the project by clicking the project name from the navigation bar. This will take you to the project home page. Below is what this home page looks like for a more complete project than we have been working through in this quick start guide. Note how you can change between several views (the buttons on the right) to show different information based on your role or current needs, or only show data for a particular release (see the dropdown beneath the project name on the left).



Congratulations! You have now completed the software development and testing lifecycle using SpiraTeam. For more information about any of the features, please refer to the SpiraTeam User Manual.

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