!!! Virtual Image Information !!!

In order to complete the exercises for this course, please ensure you request the image named "**WBT – QM 10 Self-Study**"

Exercise: Log on to Site Administration

In this exercise, you perform the following task:

- Part 1: Log on to Site Administration.

Part 1: Log on to Site Administration

To log on to Site Administration:

1. Open a Web browser and in the address bar, type http://<Quality Center server name>: 8080/sabin. The Site Administration login page appears.
2. In the User Name and Password fields, type "training" and "welcome" respectively.
3. Click Login. The Site Administration home page appears.
4. From the menu bar, select Help □ Documentation Library. The Documentation Library page appears.
5. Under the Quality Center Guides section, click the **HP Quality Center Administrator's Guide** link to view the administrator's guide or the HP Quality Center Installation Guide link to view the installation guide.
6. Close the Documentation Library page
7. Log off from Site Administration.

Exercise: Creating Domains and Projects

BigBank Inc. has recently installed Quality Center. Currently, BigBank is developing projects for online investment services, online banking systems and global transaction services. These projects are based in different regions including Asia Pacific, Europe, America, and Middle East. You need to configure the basic structure of projects for Tysoft Inc.

In this exercise, you customize the projects at an organization level. This exercise consists of the following parts:

- Part 1: Create domains.
- Part 2: Create projects.
- Part 3: Create a template.
- Part 4: Deactivate and activate projects.
- Part 5: Check connectivity.

➲Time estimate: 20 minutes

Part 1: Create Domains

Create domains for the following regions:

To create a domain:

1 Log on to the SITE ADMINISTRATION page.

2 Ensure that the SITE PROJECTS tab is selected.

3 Click **CREATE DOMAIN**.

Region Name	**Domain Name**
Asia Pacific	APAC
Europe	EMEA
Americas	AMS
Middle East	MEAST

Table 4-3. Domains in Tysoft Inc.

4 In the **DOMAIN NAME** field, type **APAC**.

5 Click **OK**.

Repeat steps 3 through 5 to create domains for Europe, America, and Africa. Refer to Table 4-3 for the domain names.

Part 2: Create Projects

In this exercise, you will create the following projects in the specified regions:

Domain Name	Project Name
APAC	ONLINEINVESTMENTS
AMS	ONLINEBANKING
EMEA	GLOBALTRANSACTIONS
MEAST	ONLINELOANS

Table 4-4. Projects in the Domains

To create a project:

1. From the SITE PROJECTS list, select domain **APAC**.
2. Click **CREATE PROJECT**. The CREATE PROJECT dialog box appears.
3. In the CREATE PROJECT dialog box, ensure that CREATE AN EMPTY PROJECT is selected.
4. Click **NEXT**.
5. In the PROJECT NAME field, type **ONLINEINVESTMENTS**.
6. Click **NEXT**.
7. Under the DATABASE TYPE section, ensure that **MS-SQL** is selected.
8. For the SERVER NAME list, the DB ADMIN USER field, and the DB ADMIN PASSWORD field, use the default values.
9. Click **NEXT**.
1. **Note:** If you are using SQL Server 2000 as the database server for Quality Center, the WARNING message box appears. Check the **DO NOT SHOW ME THIS DIALOG AGAIN** check box and click **OK**.
10. From the AVAILABLE USERS list, select **ALEX_QC** and click **ADD SELECTED USERS** button to add the selected user to the SELECTED PROJECT ADMINISTRATORS list.
11. Click **NEXT**.
12. Verify the values for the PROJECT NAME, ON DOMAIN, and ON SERVER fields.
13. Ensure that the ACTIVATE PROJECT is checked and the ENABLE VERSIONING check box is unchecked. Click **CREATE**. After the project is created, the INFORMATION message box informs you that the project is successfully created.
14. Click **OK** to close the INFORMATION message box.
15. Verify that in the SITE PROJECTS list, the project is now displayed under the domain you selected.

Repeat steps 1 through 15 to create projects for Online Banking and Online Payroll. Refer to Table 4-4 for project and domain names.

Part 3: Create a template

To create a new template:

1. From the SITE PROJECTS list, click the **CREATE TEMPLATE** button.
2. The CREATE TEMPLATE dialog box appears.
3. In the CREATE TEMPLATE dialog box, ensure that CREATE AN EMPTY TEMPLATE is selected.
4. Click **NEXT**.
5. In the TEMPLATE NAME field, type **TRAININGTEMPLATE**. Select **DEFAULT** the Domain.
6. Click **NEXT**.
7. Under the DATABASE TYPE section, ensure that **MS-SQL** is selected.
8. For the SERVER NAME list, the DB ADMIN USER field, and the DB ADMIN PASSWORD field, use the default values.
9. Click **NEXT**.
10. From the AVAILABLE USERS list, select **TRAINING** and click **ADD SELECTED USERS** button to add the selected user to the SELECTED TEMPLATE ADMINISTRATORS list.
11. Click **NEXT**.
12. Verify the values for the TEMPLATE NAME, ON DOMAIN, and ON SERVER fields.
13. Ensure that the ACTIVATE TEMPLATE is checked and the ENABLE VERSIONING check box is checked. Click **CREATE**. After the project is created, the INFORMATION message box informs you that the project is successfully created.
14. Click **OK** to close the INFORMATION message box.
15. Verify that in the SITE TEMPLATES list, the template is now displayed under the domain you selected.

Part 4: Deactivate and Activate Projects

To deactivate an existing project:

1. From the SITE PROJECTS list, under the APAC domain, select your**ONLINEINVESTMENTS** project.
2. On the SITE ADMINISTRATION toolbar, click the **DEACTIVATE PROJECT** button. The WARNING message box appears.
3. Click **OK** to close the WARNING message box. The ONLINEINVESTMENTS project is deactivated. Note the difference in the project icon. To reactivate the ONLINEINVESTMENTS project:
4. In the SITE PROJECTS list, ensure that ONLINEINVESTMENTS is selected.
5. On the SITE ADMINISTRATION toolbar, click the **ACTIVATE PROJECT** button. The ONLINEINVESTMENTS project is activated.

Part 4: Check Connectivity

Ping the ONLINEINVESTMENTS project.

1. From the SITE PROJECTS list, under the APAC domain, ensure that ONLINEINVESTMENTS is selected.
2. On the SITE ADMINISTRATION toolbar, click **PING**. The INFORMATION message box appears.
3. Click **OK** to close the INFORMATION message box.
4. Repeat steps 1 through 3 for ONLINEBANKING and GLOBALTRANSACTIONS projects. Refer to Table 4-4 for project details.
5. Log off from Quality Center.

Exercise: Maintain Projects and Domains

BigBank Inc. has recently approved two new projects, an online banking system for the Americas region and an online investment system the Asia Pacific region. Considering that BigBank Inc. has already developed similar projects, you can use the existing structure of the projects to create the new projects. Use the details provided in the Table 5-1 to create the new projects.

Region	Project Name	Copied Project Name	To Region
APAC	**ONLINEINVESTMENT**	**ONLINEINVESTMENT_2**	APAC
AMS	**ONLINEBANKING**	**ONLINEBANKING_2**	AMS

Table 5-1. Data for New Projects

This exercise consists of the following parts:

- Part 1: Copy a project.
- Part 2: Rename a project.
- Part 3: Remove a project.
- Part 4: Delete a domain.
- Part 5: Export a project to a Quality Center project file.
- Part 6: Delete a project.
- Part 7: Import a project from a Quality Center project file.
- Part 8: Link a project to a template.

➲Time estimate: 25 minutes

Part 1: Copy a Project

To copy a project:

1. Log on to the SITE ADMINISTRATION page and ensure that the SITE PROJECTS tab is selected.
2. On the SITE ADMINISTRATION toolbar, click **CREATE PROJECT**. The CREATE PROJECT dialog box appears.

3. In the CREATE PROJECT dialog box, select **CREATE A PROJECT BY COPYING DATA FROM AN EXISTING PROJECT**.
4. Click **NEXT**.
5. In the CREATE PROJECT dialog box in the SELECT PROJECT TO COPY FROM list, select **APAC:ONLINEINVESTMENTS**.
6. Click **NEXT**.
7. Click the **SELECT ALL** link. Ensure that all the check boxes in the CREATE PROJECT dialog box are checked.
8. Click **NEXT**.
9. In the PROJECT NAME field, type **ONLINEINVESTMENTS_COPY**.
10. Ensure that in the IN DOMAIN list, APAC is selected.
11. Click **NEXT**.
12. Verify the values for the DATABASE TYPE and the DB SERVER sections.
13. Click **NEXT**.
14. Choose any user as a project administrator for the new project and then click **NEXT**.
15. Ensure that the ACTIVATE PROJECT is checked, click **CREATE**.
16. The WARNING message box informs you that the project you are copying will be deactivated.
17. Click **YES**. The WARNING message box appears.
18. Click **OK**. The INFORMATION message box informs you that the new project is successfully created.
19. On the SITE ADMINISTRATION toolbar, click **REFRESH PROJECTS LIST**.

The new **ONLINEINVESTMENTS_COPY** project appears in the SITE PROJECTS list in the APAC domain.

Repeat steps 1 through 18 to create a copy of the ONLINEBANKING project. Refer to Table 5-1 for project details.

Part 2: Rename a Project

In this exercise, you need to rename the projects listed in Table 5-2.

Project Name	New Project Name
ONLINEINVESTMENTS_COPY	**ONLINEINVESTMENTS_APAC**
ONLINEBANKING_COPY	**ONLINEBANKING_AMS**

Table 5-2. Existing and New Project Names

To rename a project:

1. From the SITE PROJECTS list, in the APAC domain, select **ONLINEINVESTMENTS_COPY**.

2. On the SITE ADMINISTRATION toolbar, click **RENAME**. The RENAME PROJECT dialog box appears.

   Note: If the **ONLINEINVESTMENTS_COPY** project is active, the CONFIRM message box appears. Click **YES**. The WARNING message box informs you that all users will be disconnected. Click **OK**.

3. In the PROJECT NAME field, type **ONLINEINVESTMENTS_APAC**.

4. Click **OK** to close the WARNING message box. The updated project name appears in the SITE PROJECTS list. Repeat steps 1 through 4 to rename the ONLINEBANKING_COPY project. Refer to Table 5-2 for the project details.

Part 3: Remove a Project

To remove a project:

1. From the SITE PROJECTS list, in the AMS domain, select the **ONLINEBANKING_AMS** project.
2. On the SITE ADMINISTRATION toolbar, click **DEACTIVATE PROJECT**. The WARNING message box appears.
3. Click **OK** to close the WARNING message dialog box.
4. On the SITE ADMINISTRATION toolbar, click **REMOVE PROJECT**. The CONFIRM message box appears.
5. Click **OK**. The INFORMATION message box appears.
6. Click **OK** to close the INFORMATION message box.
7. Repeat steps 1 through 6 to remove the GLOBALTRANSACTIONS project from the EMEA domain.

Part 4: Delete a Domain

To delete the MEAST domain:

1. From the SITE PROJECTS list, select **MEAST**.
2. On the SITE ADMINISTRATION toolbar, click **DELETE DOMAIN**. The message that the domain contains projects will appear.
3. Delete the project in this domain, then proceed with the domain deletion.
4. When the CONFIRM message box appears, click **YES**.

Part 5: Export a Project to a Quality Center Project File

In this exercise, you need to export the ONLINEINVESTMENTS_APAC project to a project file.

Perform the following steps to export the ONLINEINVESTMENTS_APAC project to a project file:

1. In the SITE PROJECTS tab, in the SITE PROJECTS list, under the APAC domain, select **ONLINEINVESTMENTS_APAC**.
2. On the SITE ADMINISTRATION toolbar, click **EXPORT PROJECT TO QC PROJECT FILE**. The SAVE AS dialog box appears.

   Note: If the selected project is active, the WARNING message appears. Click **YES**. The WARNING message box informs that all the current users will be disconnected. Click **OK**.

3. From the SAVE IN list, select **DESKTOP**.
4. In the FILE NAME list, type ONLINEINVESTMENTS_APAC_EXPORT.
5. Click **SAVE**. The INFORMATION message box informs you that the project was successfully exported.
6. Click **OK** to close the INFORMATION dialog box.

Part 6: Delete a Project

To delete a project:

1. From the SITE PROJECTS list, in the APAC domain, select **ONLINEINVESTMENTS_APAC**.
2. On the SITE ADMINISTRATION toolbar, click **DELETE PROJECT**. The CONFIRM message box appears.
3. Click **OK**. The DATABASE ADMIN PASSWORD dialog box appears.
4. Verify the value of the DB ADMIN USER field and click **OK**. The INFORMATION message box confirms that the project is successfully deleted.
5. Click **OK** to close the DATABASE ADMIN PASSWORD dialog box.

Part 7: Import a Project from a Quality Center Project File

To import a project file:

1. On the SITE ADMINISTRATION toolbar, click **IMPORT PROJECT FROM QC PROJECT FILE**. The CREATE PROJECT dialog box appears.
2. In the CREATE PROJECT dialog box, to select a value for the IMPORT QUALITY CENTER PROJECT FROM field click the browse button. The OPEN dialog box appears.
3. In the OPEN dialog box, select **ONLINEINVESTMENTS_APAC_EXPORT.QCP**.
4. Click **OPEN**.
5. In the CREATE PROJECT dialog box, click **NEXT**.
6. In the PROJECT NAME field, type **ONLINEINVESTMENTS_APAC**.
7. Complete the steps to import the project.
8. The **ONLINEINVESTMENTS_APAC** project appears in the SITE PROJECTS list in the APAC domain.

Part 8: Link a Project to a Template

To link a project to a template:

1. From the SITE PROJECTS list, in the DEFAULT domain, select **TRAININGTEMPLATE** from the TEMPLATES folder.

2. Click the LINKED PROJECTS tab.
3. Click the ADD button to display the list of domains and projects.
4. Select the AMS domain, and select **ONLINEBANKING.**
5. Click the AMS domain from the SITE PROJECTS list on the left and expand the PROJECTS folder.
6. Select the **ONLINEBANKING** project and view the PROJECT DETAILS tab. Confirm it is LINKED TO TEMPLATE: **TRAININGTEMPLATE.**
7. Log off from Quality Center.

Exercise: Defining Quality Center Users I

At BigBank Inc., George Klark is a director, Alex Polendzer a project manager, and Jill Garcia is a QA lead. BigBank Inc. has also hired four developers: Kelly Foster, James David, Robert Green, and Catherine Hayak.

The company has hired two full-time QA team members, Ashley Brown and Brian Hanks. BigBank Inc. also has three testers on contract: John Adams, Allen Flemming, and Mark Brownee.

The team members need to be added in the Quality Center server. As a site administrator, you need to perform the following tasks:

- Create new users
- Assign projects to users

➲Time estimate: 30minutes

This exercise consists of the following parts:

- Part 1: Create users
- Part 2: Assign users to projects
- Part 3 Assign the site administrator privileges to users
- Part 4: Edit user details
- Part 5: Change user passwords
- Part 6: Delete users

Table 6-1 lists the user details that you will use to perform the tasks in this exercise.

User Details	Password
USER NAME: **GeorgeK** FULL NAME: **George Klark** E-MAIL: **GeorgeK@bigbank.com** PHONE NUMBER: **555-011-2255** DESCRIPTION: **Director**	**PWD1**
USER NAME: **JohnA** FULL NAME: J**ohn Adams** E-MAIL: **JohnA@bigbank.com** PHONE NUMBER: **555-012-2255** DESCRIPTION: **QA Tester on contract**	**PWD2**
USER NAME: **AshleyB** FULL NAME: **Ashley Brown** E-MAIL: **AshleyB@bigbank.com** PHONE NUMBER: **555-013-2255** DESCRIPTION: **QA Tester on contract**	**PWD3**

Table 6-1. Details to Create Global Users

Part 1: Create Users

To create a user:

1. Log on to the SITE ADMINISTRATION page as USER training, PASSWORD welcome.
2. In the SITE ADMINISTRATION page, click the **SITE USERS** tab.
3. On the SITE ADMINISTRATION toolbar, click the **NEW USER** button. The NEW USER dialog box appears.
4. In the USER NAME field, type **GeorgeK.**
5. In the FULL NAME field, type **George Klark**.
6. In the E-MAIL field, type **GeorgeK@bigbank.com.**
7. In the PHONE NUMBER field, type **555-011-2255.**
8. In the DESCRIPTION field, type **Director**.
9. Click **OK** to close the NEW USER dialog box.
10. Repeat steps 3 through 9 to create **JohnA and AshleyB** user. Refer to Table 6-1 for user details.

Part 2: Assign Users to Projects

To assign a project to a user:

1. From the SITE USERS list, select **GeorgeK**. The details for the GEORGEK user appear in the right pane.
2. In the right pane, click the **USER PROJECTS** tab.
3. Click **SELECT PROJECTS**. The SITE PROJECTS list appears in the right pane under the USER PROJECTS tab.
4. From the SITE PROJECTS list, under the **APAC** domain, check the check box corresponding to the **ONLINEINVESTMENTS_APAC** project.
5. Click the **ADD CURRENT USER TO THE SELECTED PROJECTS** button. The ONLINEINVESTMENTS_APAC project appears in the USER PROJECTS list.
6. Repeat steps 1 through 5 to assign **JohnA** user to the **ONLINEINVESTMENTS_APAC** project.
7. Click the **SITE PROJECTS** tab.
8. From the SITE PROJECTS list, under the **APAC** domain, select **ONLINEINVESTMENTS_APAC**. In the right pane, the PROJECT USERS tab is selected and the project users are listed.
9. Select the PROJECT USERS tab. Select **GeorgeK** and check the check box under the PROJECT ADMINISTRATOR column.

Part 3: Assign Site Administrator Privileges to Users

To assign site administrator privileges to a user:

1. On the SITE ADMINISTRATION page, click the **SITE USERS** tab.
2. On the SITE ADMINISTRATION toolbar, click the **SITE ADMINISTRATORS** button. The SITE ADMINISTRATORS dialog box appears.
3. In the SITE ADMINISTRATORS dialog box, click **ADD**. The SITE USERS list appears in the right pane of the SITE ADMINISTRATORS dialog box.
4. From the SITE USERS list, select **GeorgeK**
5. Click the **ADD SELECTED USERS** button. The user **GeorgeK** appears in the site administrators list.
6. **Note:** If the selected user has a blank password, the WARNING message box appears. Click **OK** to close the message box.
7. Click **CLOSE**.

Part 4: Edit User Details

To edit the details for a user:

1 From the SITE USERS list, select **GeorgeK**.

2 In the right pane, click the **USER DETAILS** tab. The details of user GeorgeK appear.

3 Clear the contents of the E-MAIL field.

4 In the E-MAIL field, type **GEORGEKLARK@BIGBANK.COM**.

5 Clear the contents of the PHONE NUMBER field.

6 In the PHONE NUMBER field, type **555-099-1145**.

7 Click **APPLY**.

Part 5: Change User Passwords

To change a user password:

1 From the SITE USERS list, select **GeorgeK**. The details of user GeorgeK appear in the right pane.

2 On the toolbar, click **PASSWORD**. The SET USER PASSWORD dialog box appears.

3 In the NEW PASSWORD field, type **PWD1**.

4 To confirm the password, in the RETYPE PASSWORD field, type **PWD1**.

5 Click **OK**. The INFORMATION message box informs you that the password is successfully changed.

6 Click **OK** to close the INFORMATION message box.

7 Repeat steps 1 through 6 to assign **PWD3** for **AshleyB.**

Part 6: Delete Users

To delete a user from the SITE USERS list:

1. From the SITE USERS list, select **JohnA**.
2. On the SITE ADMINISTRATION toolbar, click **DELETE USER**. The CONFIRM message box appears.
3. Click **YES**.
4. Log off from Quality Center.

Exercise: Quality Center Licensing and Configuration Options

BigBank Inc. requires the following policies to be incorporated in the Quality Center implementation:

- All e-mail messages are sent in the TXT format.
- The mail interval for sending defect e-mail messages is set to 20 minutes.
- An employee can send e-mail attachments of a size up to 1mb.
- Any idle session is timed out after 15 minutes to manage the load on the Quality Center server and the database server.
- An LDAP session is timed out after 20 minutes.
- The DEFECTS module must be renamed to be called BUGS.

Parameter Name	Parameter Value
MAIL_INTERVAL	10
ATTACH_MAX_SIZE	3000
WAIT_BEFORE_DISCONNECT	600

Table 7-1. Parameter Name and Value

➲Time estimate: 6 minutes

This exercise consists of the following parts:

- Part 1: Modify configuration parameters.
- Part 2: Add a parameter.
- Part 3: View other available parameters.
- Part 4: Modify a Quality Center module name.

Part 1: Modify Configuration Parameters

To modify the required configuration parameter, you perform the following steps:

1. Log on to the SITE ADMINISTRATION page.
2. On the SITE ADMINISTRATION page, click the **SITE CONFIGURATION** tab.
3. From the PARAMETER column, select the **MAIL_FORMAT** parameter.
4. On the SITE ADMINISTRATION toolbar, click **EDIT**. The EDIT PARAMETER dialog box appears.
5. In the **VALUE** field, type **TEXT**.
6. Click **OK** to close the EDIT PARAMETER dialog box.
7. Repeat steps 2 through 6 to modify the MAIL_INTERVAL, ATTACH_MAX_SIZE, and WAIT_BEFORE_DISCONNECT parameters
8. Use Table 7-1 to assign the value for the parameters.

Part 2: Add a Parameter

To add a parameter, you perform the following steps:

1. On the SITE CONFIGURATION toolbar, click **NEW**. The NEW PARAMETER dialog box appears.
2. In the PARAMETER field, type **LDAP_TIMEOUT**.
3. In the VALUE field, type **1200**.
4. In the DESCRIPTION field, type **THE LENGTH OF TIME, IN SECONDS, THAT QUALITY CENTER WAITS BEFORE CANCELING AN LDAP OPERATION**.
5. Click **OK** to add the parameter to the parameters list.

Part 3: View Other Available Parameters

To view other configuration parameters, you perform the following steps:

1. From the menu bar, select **HELP** □**HELP ON THIS PAGE**.
2. Click the OPTIONAL QUALITY CENTER PARAMETERS link to view additional parameters you can add to meet your customization requirements.
3. Locate the optional parameter that would allow you to change the name of a Quality Center module.

Part 4: Modify a Quality Center Module Name

Using the optional parameter you identified in Part 3, change the DEFECTS module name:

1. On the SITE CONFIGURATION toolbar, click **NEW**. The NEW PARAMETER dialog box appears.
2. In the PARAMETER field, type **REPLACE_TITLE**.
3. In the VALUE field, type **DEFECT;BUG;DEFECTS;BUGS**
4. In the DESCRIPTION field, type **THE DEFECTS MODULE IS RENAMED TO BUGS**.
5. Click **OK** to add the parameter to the parameters list. Validate the module rename: **Note:** Before you continue, verify the ONLINEINVESTMENT_APAC project is activated.
6. Logout of SITE ADMINISTRATION and close the browser.
7. Click the QUALITY CENTER icon on the desktop.
8. Click the QUALITY CENTER link.
9. Enter LOGIN NAME GeorgeK, PASSWORD pwd1 and click AUTHENTICATE. click LOGIN.
10. Verify the name of the DEFECTS module is renamed to BUGS.
11. Logout of QUALITY CENTER and close the browser.

Exercise: Customizing Project-Specific Entities

In this exercise, you create fields and customize labels for a specific project in a given scenario.

BigBank Inc. uses a standard template to record information. You need to customize Quality Center to reflect the template. To do this you need to create fields required for the Online Investment project, define an input mask to avoid invalid input, and customize labels.

Note: For this exercise, create fields that do not have any lookup list associated with them.

➲Time estimate: 20 minutes

In this exercise, you will perform the following tasks:

- Part 1: View Customization permissions
- Part 2: Create a field
- Part 3: Create an input mask
- Part 4: Create a memo field
- Part 5: Delete a memo field
- Part 6: Customize a label
- Part 7: Validate the changes

Part 1: View Customization Permissions

To create a field:

1. Open the Quality Center home page and click the **QUALITY CENTER** link. The Quality Center login page appears.
2. On the Quality Center login page, in the USER NAME and PASSWORD fields, type**AshleyB** and **pwd3**.
3. Click **AUTHENTICATE**.
4. Ensure that in the DOMAIN list, APAC is selected.
5. Ensure that in the PROJECT list, ONLINEINVESTMENT_APAC is selected.
6. Click **LOGIN**.
7. From the menu bar, select **TOOLS** □**CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.
8. As Ashley Brown is a project user, you only see the **USER PROPERTIES** link in the left pane of the PROJECT CUSTOMIZATION page.
9. On the menu bar, click **RETURN**.
10. Log off from Quality Center.
11. On the Quality Center login page, in the USER NAME and PASSWORD fields, type**GeorgeK** and **pass#1**, respectively.

12. Click **AUTHENTICATE**.
13. Ensure that in the DOMAIN list, APAC is selected.
14. Ensure that in the PROJECT list, ONLINEINVESTMENT_APAC is selected.
15. Click **LOGIN**.
16. From the menu bar, select **TOOLS** □**CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.

As George is the project administrator of the ONLINEINVESTMENT_APAC project, you see all the links in the left pane of the Project Customization page.

Part 2: View Customization Permissions

1. On the PROJECT CUSTOMIZATION page, click the **PROJECT ENTITIES** link.
2. In the PROJECT ENTITIES list, expand the **TEST** entity and select the **USER FIELDS** folder.
3. Click **NEW FIELD**. The FIELD SETTINGS section appears in the right pane of the PROJECT ENTITIES page.
4. Under FIELD SETTINGS, in the FIELD LABEL field, type **PREPARED BY**.
5. From the FIELD TYPE list, select **USER LIST**.
6. Check the **REQUIRED** check box.
7. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
8. Click **OK** to close the INFORMATION message box.

Repeat steps 1 through 8 to create the REVIEW STATUS, TEST OBJECTIVE, and TESTID fields. Refer to Table 9-2 for field details.

Entity	Field Label	Field Type	Lists	Required
TEST	TEST OBJECTIVE	STRING	N/A	NO
TEST	TESTID	NUMBER	N/A	NO
REQUIREMENT	REVIEW STATUS	LOOKUP LIST	YES/NO	NO

Table 9-2. Field Details

Note: When creating the TESTID field, the Warning message box appears. Click **OK** to close the WARNING message box.

Part 3: Create an Input Mask

To create an input mask:

1. In the PROJECT ENTITIES list, under the TEST entity, select the **USER FIELDS** folder.
2. Click **NEW FIELD**. The FIELD SETTINGS section appears in the right pane of the PROJECT ENTITIES page.
3. Under FIELD SETTINGS, in the FIELD LABEL field, type **CANADIAN ZIP**.
4. In the FIELD TYPE list, ensure that STRING is selected.
5. Check the **MASKED** check box. The MASKED EDIT ATTRIBUTES section appears below the FIELD SETTINGS section.
6. Under MASKED EDIT ATTRIBUTES, click **DEFINE**. The INPUT MASK EDITOR dialog box appears.
7. In the INPUT MASK field, type **L0L0L0**.

   Note: Letter L signifies that an alphabetic character is required and the number 0 signifies that a digit is required. If you need information on what mask characters to use, in the INPUT MASK EDITOR dialog box, click **HELP**.
8. In the TEST INPUT field, type **G111S2**. The Test Input field does not allow entering an invalid input value (the value is ignored).
9. In the TEST INPUT field, type **G1S4S2**.
10. Click **OK** to close the INPUT MASK EDITOR dialog box.
11. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
12. Click **OK** to close the INFORMATION message box.

Part 4: Create a Memo Field

To create a memo field:

1. On the PROJECT ENTITIES page, in the PROJECT ENTITIES list, expand the **DEFECT** entity and select the **USER FIELDS** folder.
2. Click the **NEW FIELD** arrow and from the NEW FIELD menu, select **NEW MEMO FIELD**. The FIELD SETTINGS section in the PROJECT ENTITIES page appears.
3. In the FIELD LABEL field, type **OBJECTIVE1**.
4. Check the **REQUIRED** check box.
5. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
6. Click **OK** to close the INFORMATION message box.

Part 5: Delete a Memo Field

To delete a memo field:

1. On the PROJECT ENTITIES page, in the PROJECT ENTITIES list, under the DEFECT entity and expand the **USER FIELDS** folder.
2. Select the **OBJECTIVE1** field.
3. Click **REMOVE FIELD**. The WARNING message box appears.
4. Click **OK** to close the WARNING message box and delete the field.

Part 6: Customize a Label

To customize a label:

1. On the PROJECT ENTITIES page, in the PROJECT ENTITIES list, expand the **REQUIREMENT** entity.
2. Expand the **SYSTEM FIELDS** folder.
3. Click **PRIORITY**. The FIELD SETTINGS section appears in the right pane of the PROJECT ENTITIES page.
4. Under FIELD SETTINGS, in the FIELD LABEL field, clear the text and type**CRITICALITY**.
5. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
6. Click **OK** to close the INFORMATION message box.
7. Click **RETURN** to close the **CUSTOMIZE PAGE**.

Entity	Field Label	Field Type
TEST	PREPARED BY	USER LIST
TEST	TEST OBJECTIVE	STRING
TEST	TESTID	NUMBER
TEST	CANADIAN ZIP	STRING
REQUIREMENT	REVIEW STATUS	YES/NO

Table 9-3. Field Details

Part 7: Validate the changes

To validate the new and modifed fields:

1. Select the TEST PLAN module to validate the four new fields added in Part 2. Refer to Table 9-3.
2. You will need to add a new folder to the module first. Click the **NEW FOLDER** button. Enter **FIELD TEST,** click **OK.**
3. Select the folder you just created and click the **NEW TEST** button. Keep the default Test Type and enter **FIELD TEST** as the **TEST NAME,** click **OK.**
4. Verify the four new **TEST PLAN** fields appear. Be Test sure to validate the mask again for the CANADIAN ZIP field.
5. Select the REQUIREMENTS module to validate the new field.
6. Try to explain why the new REQUIREMENTS field does not appear.

Exercise: Customizing Project-Specific Lists

In this exercise, you customize project-specific lists and associate lists to a field in the given scenario.

BigBank Inc. captures the following values as part of their defect-tracking procedures for the OnlineInvestment_APAC project:

- Complexity: Values are 1-Urgent, 2-Very High, 3-High, 4-Medium, and 5Low.
- Bug Status: Values are Not a Bug and Not Replicated.
- Investment Type: Multi-level list.

➲Time estimate: 20 minutes

As a Quality Center project administrator at BigBank inc., you need to create these lists and add items.

In this exercise, you perform the following tasks:

- Part 1: Create a list.
- Part 2: Associate a list with a field.
- Part 3: Modify a system-defined lookup list field.
- Part 4: Create a multilevel list.
- Part 5: Delete a list item.
- Part 6: Combo Exercise — Create a project and a project-specific list.

Part 1: Create a List

To create a list:

1. Log on to the OnlineInvestment_APAC project in the APAC domain in Quality Center.
2. From the Quality Center menu bar, select **Tools** □ **Customize**. The Project Customization page appears.
3. On the Project Customization page, in the left pane, click the **Project Lists** link. The Project Lists page appears.
4. On the Project Lists page, click **New List**. The New List dialog box appears.
5. In the New List dialog box, in the List Name field, type **Complexity**.
6. Click **OK** to close the New List dialog box.
7. Click **Save**. The Information message box informs you that the changes are successfully saved.

To add an item to the list:

1. On the PROJECT LISTS page, from the LISTS list, select **BUG STATUS**.
2. Click **NEW ITEM**. The NEW ITEM dialog box appears.
3. In the NEW ITEM dialog box, in the ITEM NAME field, type **NOT A BUG**.
4. Click **OK** to close the NEW ITEM dialog box.
5. Repeat steps 2 through 4 to add CANNOT REPRODUCE to the BUG STATUS list.
6. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
7. Click **OK** to close the INFORMATION message box.
8. On the PROJECT LISTS page, from the LISTS list, select **COMPLEXITY**.
9. Click **NEW ITEM**. The NEW ITEM dialog box appears.
10. In the NEW ITEM dialog box, in the ITEM NAME field, type **1-URGENT**.
11. Click **OK** to close the NEW ITEM dialog box.
12. Repeat steps 9 through 11 to add the 2-VERY HIGH, 3-HIGH 4-MEDIUM, and 5-LOW items to the COMPLEXITY list.
13. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
14. Click **OK** to close the INFORMATION message box.

Part 2: Associate a List with a Field

To associate a list with a field:

1. On the PROJECT CUSTOMIZATION page, in the left pane, click the **PROJECT ENTITIES** link. The PROJECT ENTITIES page appears.
2. In the PROJECT ENTITIES list, expand the **DEFECT** entity.
3. Under the DEFECT entity, select **USER FIELDS**.
4. On the PROJECT ENTITIES page, click **NEW FIELD**. The FIELD SETTINGS section appears in the right pane of the PROJECT CUSTOMIZATION page.
5. Under FIELD SETTINGS, in the FIELD LABEL field, type **BUG COMPLEXITY**.
6. From the FIELD TYPE list, select **LOOKUP LIST**. The LOOKUP LIST section appears below the FIELD SETTINGS section.
7. From the LOOKUP LIST list, select **COMPLEXITY**.
8. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
9. Click **OK** to close the INFORMATION message box.
10. On the PROJECT CUSTOMIZATION menu bar, click **RETURN**. The CONFIRM message box appears.
11. Click **YES**. The Quality Center home page appears.
12. On the Quality Center sidebar, click **DEFECTS**.
13. On the DEFECTS toolbar, click the **NEW DEFECT** button. The NEW DEFECT dialog box appears.

- In the NEW DEFECT dialog box, view the lookup list fields in the BUG COMPLEXITY list. When you click on the field, you can see that now you have your range of complexities to choose from. In this case, it is a single level column, but you can define multiple levels of complexity items.

14. Click **CLOSE** to close the NEW DEFECT dialog box.
15. From the Quality Center menu bar, click **TOOLS** □**CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.

Part 3: Modify a System-Defined Lookup List Field

Quality Center provides a default rating scale for system-defined lookup list fields. However, the project-specific requirements of your organization may vary. Quality Center enables you to change the rating scale that is used for system defined lookup list fields.

To modify the value of a lookup list field:

1. On the PROJECT CUSTOMIZATION page, click the **PROJECT LISTS** link. The PROJECT LISTS page appears.
2. On the PROJECT LISTS page, from the LISTS list, select **PRIORITY**.
3. From the LIST ITEMS list, select **1-LOW**.
4. On the PROJECT LISTS page, click **RENAME ITEM**. The RENAME LIST ITEM dialog box appears.
5. In the RENAME LIST ITEM dialog box, in the ITEM NEW NAME field, type **1URGENT**.
6. Click **OK**.
7. Repeat steps 3 through 6 to rename the 2-MEDIUM, 4-VERY HIGH, and 5-URGENT list items. Refer to Table 10-2 for field details.
8. On the PROJECT CUSTOMIZATION page, click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
9. Click **OK** to close the INFORMATION message box.

Part 4: Create a Multilevel List

Existing Field Name	New Field Name
1-LOW	1-URGENT
2-MEDIUM	2-VERY HIGH
3-HIGH	3-HIGH
4-VERY HIGH	4-MEDIUM
5-URGENT	5-LOW

Table 10-2. Values of Priority List Field

To create a multilevel list:

1. On the PROJECT LISTS page, click **NEW LIST**. The NEW LIST dialog box appears.
2. In the NEW LIST dialog box, in the LIST NAME field, type **INVESTMENT TYPE**.
3. Click **OK** to close the NEW LIST dialog box.
4. Click **NEW ITEM**. The NEW ITEM dialog box appears.
5. In the NEW ITEM dialog box, in the ITEM NAME field, type **STOCKS**.
6. Click **OK** to close the NEW ITEM dialog box.
7. Click **NEW SUB-ITEM**. The NEW SUB-ITEM dialog box appears.
8. In the NEW SUB-ITEM dialog box, in the SUB-ITEM NAME field, type **COMMON**.
9. Continue to add the new item and sub-items so your new list so that it matches Figure 10-14.
10. On the PROJECT CUSTOMIZATION page, click the **PROJECT ENTITIES** link. The PROJECT ENTITIES page appears.
11. On the PROJECT ENTITIES page, under the DEFECT entity, create a new user field with value for the FIELD LABEL field as INVESTMENT TYPE and the value for the FIELD TYPE field as LOOKUP LIST. Associate this field with the INVESTMENT TYPE lookup list.
12. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
13. On the PROJECT CUSTOMIZATION menu bar, click **RETURN**. To view the multi-level list:

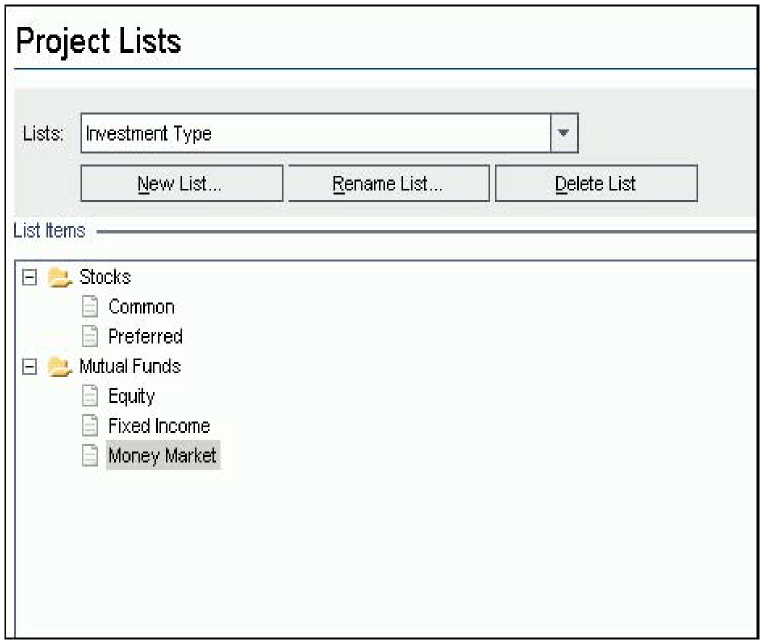

Figure 10-4 Multilevel list

1 On the Quality Center sidebar, click **DEFECTS (BUGS)** due to rename.

2 On the DEFECTS toolbar, click the **NEW BUGS** button. The NEW BUG dialog box appears.

3 In the NEW BUG dialog box, navigate to the INVESTMENT TYPE field to view the multilevel list.

4 Click **CLOSE** to close the NEW BUG dialog box.

5 From the Quality Center menu bar, select **TOOLS -> CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.

Part 5: Delete a List Item

To delete a list item

1 Return to the PROJECT CUSTOMIZATION page, click the **PROJECT LISTS** link. The PROJECT LISTS page appears.

2 On the PROJECT LISTS page, from the LISTS list, select **COMPLEXITY**.

3 From the LIST ITEMS list, select **1-URGENT**.

4 Click **DELETE ITEM**. The CONFIRM message box confirms the deletion of the selected item.

5 Click **YES** to confirm the deletion.

6 Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.

7 Click **OK** to close the INFORMATION message box.

8 Click **RETURN**.

Exercise: Managing Users and User Groups

BigBank Inc. has a director, project managers, QA leads, QA testers, and developers. Every project at BigBank Inc. has an assigned project manager and a set of developers. The QA team at BigBank Inc. is headed by a QA lead and has a group of testers. Most of the QA testers are full-time employees. However, when required, BigBank Inc. hires contract employees for the duration of a project. According to company policy, contract employees have limited access to company resources, such as software and internal tools.

Developers can view only the defects assigned to them. If a defect is reopened, a developer can either reject the defect or fix it. Therefore, developers can change the STATUS of a defect from OPEN to FIXED or REJECTED. Similarly, a QA tester can change the status of a defect from NEW to OPEN, OPEN or FIXED to CLOSED, and FIXED to REOPEN.

As a project administrator at BigBank, you need to:

- Manage project users.
- Manage user groups. In this exercise, you perform the following tasks:
- Part 1: Add users to a project.
- Part 2: Create a user group.
- Part 3: Set permissions for a user group.
- Part 4: Configure transition rules for a user group.
- Part 5: Add users to a user group.
- Part 6: Hide data from a user group.
- Part 7: Remove a user from a project.
- Part 8: Combo exercise - Create users and user groups.

➲ Time: 40 minutes

Part 1: Add Users to a Project

To add a user to a project:

1. Log on to the ONLINEINVESTMENT_APAC project under the APAC Quality Center domain. Use username **GeorgeK** and password **pwd1.**
2. From the Quality Center menu bar, select **TOOLS -> CUSTOMIZE**.
3. On the PROJECT CUSTOMIZATION page, click the **PROJECT USERS** link. The PROJECT USERS page appears.
4. On the PROJECT USERS page, click **ADD USER**. The ADD USER TO PROJECT dialog box appears.
5. In the ADD USER TO PROJECT dialog box, click **CREATE NEW USER**. The NEW USER dialog box appears.
6. In the NEW USER dialog box, type the following values for the corresponding fields:
   - USER NAME: **JillJ**
   - FULL NAME: **Jill Jones**
   - E-MAIL: **JillJ@bigbank.com**
   - PHONE NUMBER: **555-555-0377**
   - DESCRIPTION: **QA Lead**

Group	Create As
DevLead	DEVELOPER
QALead	QATESTER

Table 11-1. Field Details

7. Click **OK** to close the ADD USER TO PROJECT dialog box.
8. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
9. Click **OK** to close the INFORMATION message box.

Part 2: Create a User Group

To create a user group:

1. On the PROJECT CUSTOMIZATION page, click the **GROUPS** link. The GROUPS page appears.
2. On the GROUPS page, click **NEW**. The NEW GROUP dialog box appears.
3. In the NEW GROUP dialog box, in the NAME field, type **DIRECTOR**.
4. From the CREATE AS list, select **VIEWER**.
5. Click **OK**. The CONFIRM message box prompts you to confirm the creation of the new user group.
6. Click **YES**. The DIRECTOR user group appears in the GROUPS list.
7. Repeat steps 2 through 6 to create other user groups identified in Table 11-1.
8. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
9. Click **OK** to close the INFORMATION message box.

Part 3: Set Permissions for a User Group

To set permissions for a user group:

1. On the GROUPS page, in the GROUPS list, ensure that DEVLEAD is selected.

2. Click the **CHANGE** button to edit the permissions for this group.
3. Click the **TEST LAB** tab.
4. Check the **ADD TEST SET** check box. The MODIFY TEST SET check box is automatically selected.
5. Click **OK** to close the PERMISSION SETTINGS dialog box.
6. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
7. Click **OK** to close the INFORMATION message box.

Part 4: Configure Transition Rules for a User Group

To configure transition rules for a user group:

1. On the GROUPS page, in the GROUPS list, ensure that QALEAD is selected.
2. Under GROUPS, click **CHANGE** to change permissions of the QALEAD user group. The PERMISSION SETTINGS dialog box appears and the RELEASES tab is selected by default.
3. Click the **DEFECTS** tab.
4. Expand **MODIFY DEFECT**.
5. Select **STATUS**. The TRANSITION RULES grid appears in the PERMISSION SETTINGS dialog box.
6. From the TRANSITION RULES grid, click the ADD button.
7. Change the FROM selection to the list and select NEW. Change the TO selection to the list and select OPEN.
8. Select the FIXED to $ANY entry and click the DELETE button. Click **OK** to confirm the warning.
9. Click **OK** to close the PERMISSION SETTINGS dialog box.
10. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
11. Click **OK** to close the INFORMATION message box.

Part 5: Add Users to a User Group

To add a user to a user group:

1. On the PROJECT CUSTOMIZATION page, click the **PROJECT USERS** link. The PROJECT USERS page appears.
2. On the PROJECT USERS page, from the PROJECT USERS list, select **JILLJ**.
3. From the NOT MEMBER OF list, select **QALEAD** and click the **<** arrow button.
4. From the MEMBER OF list, select **VIEWER** and click the **>** arrow button.
5. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
6. Click **OK** to close the INFORMATION message box.
7. On the Quality Center menu bar, click **RETURN**. The Quality Center home page appears.
8. On the Quality Center sidebar, click **DEFECTS (BUGS)**.
9. On the DEFECTS toolbar, click the **NEW BUG** button. The NEW BUG dialog box appears.
10. In the NEW BUG dialog box, in the SUMMARY field, type **THIS IS A SAMPLE DEFECT**.
11. From the SEVERITY lists select **1-LOW**.
12. Click **SUBMIT**.
13. Click **CLOSE** to close the NEW DEFECT dialog box.
14. Log off from Quality Center.
15. Log on to the ONLINEINVESTMENT_APAC Quality Center project as a member of the QALEAD user group, by using JillJ as the user name and a blank password.
16. On the Quality Center sidebar, click **DEFECTS (BUGS)**.
17. Double-click on the new defect added above.
18. Try to change the **STATUS** to REJECTED. What value are you allowed to change to?
19. Log off from Quality Center.

Part 6: Hide Data from a User Group

To hide data from a user group:

1. Log on to Quality Center ONLINEINVESTMENT_APAC under your domain using **georgek** as the user name and **pwd1** as the password.
2. Open the PROJECT CUSTOMIZATION page for the project.
3. Click the **GROUPS** link. The GROUPS page appears.
4. On the GROUPS page, from the GROUPS list, select **QALEAD**.
5. Click **CHANGE** to change permissions for the QALEAD user group. The PERMISSION SETTINGS dialog box appears.
6. In the PERMISSION SETTINGS dialog box, click the **DEFECTS** tab.
7. Click the **DEFECTS DATA-HIDING FILTER** link. The DEFECTS DATA-HIDING FILTER dialog box appears.
8. Click the FILTER CONDITION column corresponding to the ASSIGNED TO field. The browse button appears in the FILTER CONDITION column.
9. Click the browse button. The SELECT FILTER CONDITION dialog box appears.
10. In the SELECT FILTER CONDITION dialog box, under the NAME column, select **JILLG**.
11. Click **OK** to close the SELECT FILTER CONDITION dialog box.
12. Click **OK** to close the DEFECTS DATA-HIDING FILTER dialog box.
13. Click **OK** to close the PERMISSION SETTINGS dialog box.
14. Click **SAVE**. The INFORMATION message box appears.
15. Click **YES**.
16. On GROUPS page menu bar, click **RETURN**. The Quality Center home page appears.
17. On the Quality Center sidebar, click **DEFECTS**.
18. Click **NEW DEFECT**. The NEW DEFECT dialog box appears.
19. In the NEW DEFECT dialog box, in the SUMMARY field, type **THIS DEFECT IS VISIBLE TO JILL JONES**.
20. From the ASSIGNED TO list, select **JILLJ**.
21. Fill in the details for the required fields and click **SUBMIT**.
22. In the NEW DEFECT dialog box, in the SUMMARY field, type **THIS DEFECT IS NOT VISIBLE TO JILL JONES**.
23. Fill in the details for the required fields and click **SUBMIT**.
24. Click **CLOSE** to close the NEW DEFECT dialog box.
25. Log off from Quality Center.
26. Log on to the ONLINEINVESTMENT_APAC Quality Center project with **JillJ** as the user name and a blank password.
27. Click the **DEFECTS** module and verify that you can view only those defects that are assigned **JillJ**.

28. Log off from Quality Center.

Part 7: Remove a User from a Project

To remove a user from a project:

1. Log on to Quality Center ONLINEINVESTMENT_APAC under your domain using**georgek** as the user name and **pwd1** as the password.
2. On the PROJECT CUSTOMIZATION page, click the **PROJECT USERS** link. The PROJECT USERS page appears.
3. On the PROJECT USERS page, from the PROJECT USERS list, select **ALEX_QC**.
4. Click **REMOVE USER**.
5. Click **OK**. The WARNING message box confirms the deletion of the selected user.
6. Click **OK** to delete ALEX_QC from the PROJECT USERS list.
7. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
8. Click **OK** to close the Information message box.
9. Log off from Quality Center.

Exercise: Customizing Mailing Options and AlertRules

As a Quality Center project administrator at BigBank Inc., you need to customize e-mail options to ensure the following:

- When a defect with urgent severity is raised by the QA team, a notification e-mail message is sent to James.
- When a defect has a very high or urgent severity, and the estimated fix time is greater than 30 days, a notification e-mail message is sent to Cecil.

In this exercise, you will also configure the alert rules based on the given scenario.

Alex is the project manager and Alice is the QA lead of a project in BigBank Inc. Alex and Alice have decided that when a requirement is modified, a notification alert must be sent to the QA team member who designed the test cases for that requirement.

BigBank Inc. wants to ensure that the associated tester is notified when the status of a defect changes to fixed.

As a project administrator at BigBank Inc., you need to:

- Configure Alert rules for notifying members of the QA team.
- Set verification rules to notify a tester when the status of a defect is changed to FIXED.

As a team member, you can view and clear notification alerts.

➲Time estimate: 20 minutes

In this exercise, you will perform the following tasks:

- Part 1: Set e-mail notices for James.
- Part 2: Set e-mail notices for Cecil.
- Part 3: Configure Alert rules.
- Part 4: View emails and notification alerts.

Part 1: Set E-mail Notices for James

1. Log on to the TRAINING_EMAILALERTS project under the DEFAULT domain using**alex_qc** as the user name and **iloveqc10** as the password.
2. From the Quality Center menu bar, select **TOOLS** □**CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.
3. On the PROJECT CUSTOMIZATION page, click the **AUTOMAIL** link. The AUTOMAIL page appears.
4. On the AUTOMAIL page, ensure that the FIELDS tab is selected.
5. Under the FIELDS tab, click the << button to clear the MAIL ON CHANGE OF list.
6. From the AVAILABLE DEFECT FIELDS list, select **SEVERITY**.
7. Click the **>** arrow button to move the SEVERITY field from AVAILABLE DEFECT FIELDS list to MAIL ON CHANGE OF list.
8. On the AUTOMAIL page, click the **CONDITION** tab.
9. From the USERS list, select **JAMES_QC**
10. Click **CONDITION**. The FILTER dialog box appears.
11. In the FILTER dialog box, click the field in the FILTER CONDITION column that corresponds to the SEVERITY field. The browse button appears in the FILTER CONDITION column.
12. Click the **BROWSE** button. The SELECT FILTER CONDITION dialog box appears.
13. In the SELECT FILTER CONDITION dialog box, select **5-URGENT**.
14. Click **OK** to close the SELECT FILTER CONDITION dialog box.
15. Click **OK** to close the FILTER dialog box.
16. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
17. Click **OK** to close the INFORMATION message box. We will test this at the end of the lesson.

Part 2: Set E-mail Notices for Cecil

1. On the AUTOMAIL page, click the **FIELDS** tab.
2. From the AVAILABLE DEFECT FIELDS list, select **ESTIMATED FIX TIME** and click the **>** arrow button to add ESTIMATED FIX TIME to the MAIL ON CHANGE OF list.
3. On the AUTOMAIL page, click the **CONDITION** tab.
4. From the USERS list, select **CECIL_QC**.
5. Click **CONDITION**. The FILTER dialog box appears.
6. In the FILTER dialog box, click the field in the FILTER CONDITION column that corresponds to the SEVERITY field. The browse button appears in the FILTER CONDITION column.
7. Click the browse button. The SELECT FILTER CONDITION dialog box appears.
8. In the SELECT FILTER CONDITION dialog box, in the CONDITION field, select **5URGENT**, **OR**, and **4-VERY HIGH**.
9. Click **OK** to close the SELECT FILTER CONDITION dialog box.
10. Repeat steps 5 through 7 to specify the > 30 filter condition for the ESTIMATED FIX TIME field.
11. **Note:** To specify the > 30 condition, in the SELECT FILTER CONDITION dialog box, select **>** and

type **30**.

12. Click **OK** to close the FILTER dialog box.
13. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
14. Click **OK** to close the INFORMATION message box. We will test this condition later in the lesson.

Part 3: Configure Alert Rules

1 On the PROJECT CUSTOMIZATION page, click the **ALERT RULES** link. The ALERT RULES page appears.

2 On the ALERT RULES page, check both boxes corresponding to the following alert: WHEN A REQUIREMENT IS MODIFIED, ALERT THE ASSOCIATED TESTS .

3 Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.

4 Click **OK**. **Note:** Do not check or uncheck any other check boxes.

5 On the PROJECT CUSTOMIZATION menu bar, click **RETURN**. The Quality Center home page appears.

Part 4: Test the Automail and Alerts

Test condition established in Part 1:

1. On the Quality Center sidebar, click **DEFECTS** module.
2. Click the **NEW DEFECT** button.
3. Type EMAIL TEST in the **SUMMARY,** select 5-URGENT for the **SEVERITY.**
4. In the Description type: THIS DEFECT SHOULD SEND AN EMAIL TO JAMES_QC.
5. Click **SUBMIT** to save the **DEFECT.**
6. Click **CLOSE**. Test condition established in Part 2:
7. Double-Click on the **DEFECT** with **DEFECT ID** = 1.
8. Change the **SEVERITY** to 4-VERY HIGH.
9. Enter **45** for the **ESTIMATED FIX TIME.**
10. In the Description type change the text to: THIS DEFECT SHOULD SEND AN EMAIL TO CECIL_QC.
11. Click **OK** to save the **DEFECT.** Test condition established in Part 3:
12. Select the **REQUIREMENTS** module.
13. Open the SEND EMAIL requirement**.**
14. In the DESCRIPTION field change the text to: THIS CHANGE SHOULD SEND AN EMAIL AND SET A NOTIFICATION ALERT FOR ALICE_QC**.**
15. Click **OK.**
16. Logout of **QUALITY CENTER**.
17. Login to **SITE ADMINISTRATION** as USER training, PASSWORD welcome.
18. On the **SITE PROJECTS** tab select the TRAINING_EMAILALERTS project.
19. On the **PROJECT DETAILS** tab click the **SEND E-MAIL NOW** button.
20. Logout of **QUALITY CENTER**.
21. Close the browser.
22. On the Desktop, click the **OUTLOOK EXPRESS** icon.
23. The login should appear for alice_qc. Enter **PASSWORD**: iloveqc10 and click **OK.**
24. There should be an email in the inbox. Open and review the email. Close the email.
25. Navigate to the **FILE->SWITCH IDENTITY** menu.
26. Select cecil_qc and click **OK.** Enter **PASSWORD**: iloveqc10 and click **OK.**
27. There should be an email in the inbox. Open and review the email, note the description indicating this email should be sent to Cecil QC.
28. Close the email.
29. Navigate to the **FILE->SWITCH IDENTITY** menu.
30. Select james_qc and click **OK.** Enter **PASSWORD**: iloveqc10 and click **OK.**

31. There should be an email in the inbox. Open and review the email, note the description indicating this email should be sent to James QC.
32. Close Outlook.
33. Launch **QUALITY CENTER** from the Desktop.
34. Select the **QUALITY CENTER** link.
35. Login as alice_qc, **PASSWORD:** iloveqc10.
36. Select the **TEST PLAN** module.
37. Expand the Email Tests folder.
38. Click the mouse on the **ALERT** icon (red exclamation) to display the **ALERTS** dialog box. Review the alert.
39. Click the **CLEAR ALL** button to remove the alert. Click **OK** to confirm.
40. Close the **ALERTS** dialog box.
41. Logout of **QUALITY CENTER.**

Exercise: Customizing Project-SpecificWorkflow

In this exercise, you customize the workflow in the given scenario.

BigBank Inc. has offices in different parts of the world that participate in defect testing. For the Online Investment project, you want to ensure that a defect is raised in the regions where the developers are located. To do this, you need to customize the workflow.

As a project administrator at BigBank Inc., you need to:

- Set up workflow field dependencies.
- Adjust the visible and required fields for different user groups.

➲Time Estimate: 15 minutes

In this exercise, you perform the following tasks:

- Part 1: Create a lookup lists.
- Part 2: Create the entities.
- Part 3: Customize a list.
- Part 4: Customize the NEW DEFECT dialog box.
- Part 5: Customize the DEFECT DETAILS dialog box.

Part 1: Create a Lookup List

1. Create the lookup lists provided in Table 13-1.

   Refer to lesson 10: Customizing Project-Specific Entities if you need help remembering the steps to create lookup lists.

Lookup List Name	Values
REGION	APAC AMS EMEA
Lookup List Name	**Values**
APAC_OFFICE	SHANGHAI BANGALORE SINGAPORE

Lookup List Name	Values
REGION	APAC AMS EMEA
Lookup List Name	**Values**
APAC_OFFICE	SHANGHAI BANGALORE SINGAPORE
AMS_OFFICE	NEW YORK CHICAGO SAN FRANCISCO
EMEA_OFFICE	PARIS PRAGUE MILAN

Table 13-1. User-Defined Fields and Associated Lookup Lists

Part 2: Create an Entity

1. Log on to the ONLINEINVESTMENT_APAC project under the APAC domain using georgek as the user name and pwd1 as the password.
2. The first step to customize the workflow is to create different user-defined entities and associated lookup lists. Create the user-defined fields with the associated lookup lists provided in Table 13-2.

Refer to Lesson 11: Customizing Project-Specific Lists if you need help remembering the steps to create user-defined fields.

Entity	Field Name	Associated Lookup List
DEFECT	**REGION**	**REGION**
DEFECT	**OFFICE**	**APAC_OFFICE**

Table 13-2. User-Defined Fields and Associated Lookup Lists

Part 3: Customize a List

To customize a list:

1. On the PROJECT CUSTOMIZATION page, click the **WORKFLOW** link. The WORKFLOW page appears.
2. On the WORKFLOW page, click the **SCRIPT GENERATOR - LIST CUSTOMIZATION FOR DEFECTS MODULE** link. The SCRIPT GENERATOR - LIST CUSTOMIZATION dialog box appears.
3. In the SCRIPT GENERATOR - LIST CUSTOMIZATION dialog box, under PRIMARY/SECONDARY RULE, click the **SELECT PRIMARY** link. The SELECT PRIMARY list appears.
4. From the SELECT PRIMARY list, select **REGION**.
5. Click the **SELECT SECONDARY** link. The SELECT SECONDARY list appears.
6. From the SELECT SECONDARY list, select **OFFICE**.
7. Under LIST MATCH RULE, click the **SELECT LIST** link that appears to the right of the each value. The SELECT LIST list appears.
8. Match each office (AMS, APAC and EMEA) with the approriate list.
9. Click **APPLY SCRIPT CHANGES**.

10. On the PROJECT CUSTOMIZATION menu bar, click **RETURN**. The home page of the ONLINEINVESTMENT_APAC project appears.
11. On the Quality Center sidebar, click **DEFECTS**.
12. On the Quality Center toolbar, click **NEW DEFECT**. The NEW DEFECT dialog box appears.
13. In the NEW DEFECT dialog box, from the REGION list, select **APAC**. In the OFFICE list, the values associated with the APAC_OFFICE list appear in the OFFICE list.
14. In the NEW DEFECT dialog box, from the REGION list, select **AMS**. In the OFFICE list, the values associated with the AMS_OFFICE list appear in the OFFICE list.
15. In the NEW DEFECT dialog box, from the REGION list, select **EMEA**. In the OFFICE list, the values associated with the EMEA_OFFICE list appear in the OFFICE list.
16. Click **CLOSE** to close the NEW DEFECT dialog box. **Note:** The list that appears depends on the value selected in the REGION lookup list.

Part 4: Customize the New Defect Dialog Box

To customize the NEW DEFECT dialog box:

1. On the PROJECT CUSTOMIZATION page, click the **WORKFLOW** link. The WORKFLOW page appears.
2. On the WORKFLOW page, click the **SCRIPT GENERATOR - ADD DEFECT FIELD CUSTOMIZATION** link. The SCRIPT GENERATOR - ADD DEFECT FIELD CUSTOMIZATION dialog box appears.
3. In the SCRIPT GENERATOR - ADD DEFECT FIELD CUSTOMIZATION dialog box, from the USER GROUP list, select **QATESTER**.
4. From the VISIBLE FIELDS list, select **ESTIMATED FIX TIME**.
5. Click the **<** arrow button to move the selected field from the VISIBLE FIELDS list to the AVAILABLE FIELDS list.
6. From the VISIBLE FIELDS list, if not already selected, select the check boxes for the following fields:

    DETECTED BY

    PRIORITY

    SEVERITY

    STATUS

8. Clear the **SUMMARY** and **DETECTED ON DATE** check boxes.
9. Pick each selected field and drag and drop to the bottom of the SCRIPT GENERATOR

-ADD DEFECT FIELD CUSTOMIZATION dialog box under PAGE 2.

Note: Additional pages are added as parent containers. When you view the SCRIPT GENERATOR - ADD DEFECT FIELD CUSTOMIZATION dialog box at a later time, all the additional pages appear as different tabs.

10. Click **APPLY SCRIPT CHANGES**. **Note:** If the WARNING message box appears, click **YES**.
11. On the PROJECT CUSTOMIZATION page, click the **GROUPS** link. The GROUPS page appears.
12. On the GROUPS page, from the GROUPS list, select **QATESTER**.
13. Under USERS, from the NOT IN GROUP list, select **GEORGEK**.
14. Click the **>** arrow button to add the GEORGEK user to the IN GROUP list.
15. On the GROUPS page, from the GROUPS list, select **DIRECTOR**.
16. Under USERS, from the IN GROUP list, select **GEORGEK**.
17. Click the **>** arrow button to add the GEORGEK user to the NOT IN GROUP list.
18. Click **SAVE**. The INFORMATION message box informs you that the changes are successfully saved.
19. Click **OK**.
20. Log off from Quality Center.
21. Log on to the ONLINEINVESTMENT_APAC Quality Center project with GEORGEK as the user name and PWD1 as the password.
22. Click the **DEFECTS** module.
23. On the Quality Center toolbar, click **NEW DEFECT**. The NEW DEFECT dialog box appears. The DETECTED BY, PRIORITY, SEVERITY, and STATUS fields are required fields and appear in red.
24. In the NEW DEFECT dialog box, in the SUMMARY field, type **THIS IS A SAMPLE DEFECT**.
25. From the PRIORITY list, select **4-MEDIUM**.
26. From the SEVERITY list, select **2-MEDIUM**.
27. From the STATUS list, select **OPEN**.
28. Type appropriate values for all the required fields and click **SUBMIT**.
29. Click **CLOSE** to close the NEW DEFECT dialog box.

Part 5: Customize the Defect Details Dialog Box

To customize the DEFECT DETAILS dialog box:

1. Open the PROJECT CUSTOMIZATION page.
2. On the WORKFLOW page, click the **SCRIPT GENERATOR - DEFECT DETAILS FIELD CUSTOMIZATION** link. The SCRIPT GENERATOR - DEFECT DETAILS FIELD CUSTOMIZATION dialog box appears.
3. In the SCRIPT GENERATOR - DEFECT DETAILS FIELD CUSTOMIZATION dialog box, from the USER GROUP list, select **QATESTER**.
4. From the VISIBLE FIELDS list, select **ESTIMATED FIX TIME**.
5. Click the > arrow button to move the selected field from the VISIBLE FIELDS list to the AVAILABLE FIELDS list.
6. From the VISIBLE FIELDS list, if not already selected, select the check boxes for the following fields:

   DETECTED BY

   PRIORITY

   SEVERITY

   STATUS
7. Clear the **SUMMARY** and **DETECTED ON DATE** check boxes.
8. Pick each selected field and drag and drop to the bottom of the SCRIPT GENERATOR

   -DEFECT DETAILS FIELD CUSTOMIZATION dialog box under PAGE 2.
9. Click **APPLY SCRIPT CHANGES**. **Note:** If the WARNING message box appears, click **YES**.
10. On the PROJECT CUSTOMIZATION menu bar, click **RETURN**. The Quality Center home page appears.
11. On the Quality Center sidebar, click **DEFECTS**.
12. On the Quality Center toolbar, click **DEFECT DETAILS**. The DEFECT DETAILS dialog box appears. The DETECTED BY, PRIORITY, SEVERITY, and STATUS fields are required fields and appear in red.
13. View Page 2 to view the fields that you added.
14. Click **OK** to close the DEFECT DETAILS dialog box.
15. Log off from Quality Center.

Exercise: Implementing Workflow Using theScript Editor

In this exercise, you add a button to a Quality Center module for the given scenario.

BigBank Inc. needs a workflow that will enable users to view their access rights by clicking the ACCESS_RIGHTS button.

As a project administrator at BigBank Inc., you need to add a command button to the REQUIREMENTS module in Quality Center.

➲Time: 10 minutes

In this exercise, you perform the following task:

- Part 1: Add a command button.

Part 1: Add a Command Button

To add a command button to a Quality Center module:

1. Log on to the ONLINEINVESTMENT_APAC project under the DEFAULT domain using **georgek** as the user name and **pwd1** as the password.
2. From the Quality Center menu bar, select **TOOLS** □**CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.
3. On the PROJECT CUSTOMIZATION page, click the **WORKFLOW** link. The WORKFLOW page appears.
4. On the WORKFLOW page, click the **SCRIPT EDITOR** link. The SCRIPT EDITOR window appears.
5. In the SCRIPT EDITOR window, click the **TOOLBAR BUTTON EDITOR** tab.
6. On the COMMAND BAR list, ensure that **REQUIREMENTS** is selected.
7. Click **ADD**.
8. In the CAPTION field, type **ACCESS_RIGHTS**.
9. In the HINT field, type **ACCESS RIGHTS TO A MODULE**.
10. In the ACTION NAME field, type **ACCESS_RIGHTS**.
11. From the IMAGES section, select an icon for the button and click **APPLY**.
12. On the SCRIPT EDITOR toolbar, click **SAVE**.
13. Click the **SCRIPT EDITOR** tab.
14. In the scripts tree, expand **COMMON SCRIPT** and select **ACTIONCANEXECUTE**.
15. In the scripts pane, type the following workflow script for the ACTIONCANEXECUTE event:

```
Function ActionCanExecute (ActionName)

if ActionName = "Access_Rights" thenMsgBox "Hi " & User.FullNameend if

End Function
```

Note: The code provided is case-sensitive. Ensure that the casing is correct when you type the code in the SCRIPT EDITOR.

16. On the SCRIPT EDITOR toolbar, click **SAVE**. The following message appears in the messages pane: THE SCRIPT SUCCESSFULLY PASSED SYNTAX CHECK.
17. Close the SCRIPT EDITOR window and on the PROJECT CUSTOMIZATION menu bar, click **RETURN**. The Quality Center home page appears.
18. On the Quality Center sidebar, click **REQUIREMENTS**.
19. To view the appropriate permissions message, in the toolbar, click the icon you selected for your button.
20. A message box appears. Click **OK**.
21. Log off from Quality Center.

Exercise: Implementing Templates

In this exercise, you customize a template and apply the changes to linked projects.

BigBank Inc. has decided to implement Cross Project Customization. They plan to implement the feature with a the project OnlineBanking project that is just starting.

As a template administrator at BigBank Inc., you need to customize the **TRAININGTEMPLATE** and propagate those changes to the OnlineBanking project.

➲Time: 20 minutes

In this exercise, you perform the following task:

- Part 1: Customize a Template.
- Part 2: Verify and Apply Template Changes.
- Part 3: Validate the Changes are applied to the Linked Project.

Part 1: Customize a Template

To customize a template:

1. Log on to the TRAININGTEMPLATE template under the DEFAULT domain using**training** as the user name and **welcome** as the password.
2. From the Quality Center menu bar, select **TOOLS** ☐**CUSTOMIZE**. The TEMPLATE CUSTOMIZATION page appears.
3. On the TEMPLATE CUSTOMIZATION page, click the **GROUPS (SHARED)** link. The USER GROUPS page appears.
4. On the GROUPS page, click the **NEW** button to create a new user group. The NEW GROUP window appears.
5. Enter **Cust Project Mgr** as the NAME and select **PROJECT MANAGER** as the CREATE AS.
6. Click **OK**. Click **YES** to confirm.
7. Click the navigation arrows until the ADMINISTRATION tab is visible.
8. Check **UNDO CHECK OUTS**. Check **SETUP WORKFLOW.**

1. Click **OK**. Click **SAVE.** Click **OK** to close the information window.

2. Click on the PROJECT ENTITIES (SHARED) link.

3. Expand the CYCLE Entity.

4. Add a new user field called **Cycle Owner.** Accept the field type defaults.

5. Click **SAVE.**

6. Click on the WORKFLOW (SHARED) link.

7. Select the SCRIPT EDITOR link.

8. Open the TEMPLATE_REQ_NEW function.
9. Edit the statement to add the MsgBox code below:

```
Sub Template_Req_New
     On Error Resume Next
     MsgBox ("From the template”)
     On Error GoTo 0
End Sub
```

10. Click the **SAVE** icon and close the SCRIPT EDITOR window**.**

11. Click **SAVE.**

12. Click **RETURN.**

Part 2: Verify and Apply Template Changes

To verify and apply template changes:

1. Select the **CROSS PROJECT CUSTOMIZATION** link. The CROSS PROJECT CUSTOMIZATION - LINKED PROJECTS page appears.

2. Select the ONLINEBANKING linked project.

3. Click the **VERIFY** button. The **VERIFICATION** window displays.

4. When the **VERIFY** completes, click the **DETAILS** button and click the **REPORT** link.

5. Confirm the changes you made to the template are included in the report.

6. Close the report.

7. Close the **VERIFICATION** window. Confirm the **VERIFIED?** column for the project is updated with a green checkmark.

8. Click the **APPLY CUSTOMIZATION** button. The **APPLY CUSTOMIZATION INITIALIZATION** window displays.

9. Uncheck the **SEND MAIL NOTIFICATION TO PROJECT ADMINISTRATORS** box.

10. Click the **START** button. The **APPLY CUSTOMIZATION** window displays.
11. When the **APPLY CUSTOMIZATION** completes, click the **DETAILS** button and click the **REPORT** link.
12. Confirm the changes you made to the template are included in the report.
13. Close the report.
14. Close the **APPLY CUSTOMIZARION** window. Confirm the **UPDATED?** column for the project is updated with a green checkmark.
15. Click **RETURN.**

1. Log out of the **TEMPLATE.**

Part 3: Validate the Changes are applied to the Linked Project

To validate changes are applied to the linked project:

1 Log on to the ONLINEBANKING project under the AMS domain using **alex_qc** as the user name and **iloveqc10** as the password.

2 From the Quality Center menu bar, select **TOOLS ->CUSTOMIZE**. The PROJECT CUSTOMIZATION page appears.

3 On the TEMPLATE CUSTOMIZATION page, click the **GROUPS** link. The USER GROUPS page appears.

4 On the GROUPS page verify the new group you created in the template now appears in the project (**Cust Project Mgr)**. Click the **VIEW** button (Note the **VIEW** buttonis disabled) to check for the changes you made to the ADMINISTRATION tab.

5 Click **CLOSE**.

6 Click on the PROJECT ENTITIES link.

7 Expand the CYCLE Entity and review the USER FIELDS.

8 Confirm the new user field **Cycle Owner** appears. Note the field label or any other attributes can not be changed.

9 Click on the WORKFLOW link.

10 Select the SCRIPT EDITOR link.

11 Open the TEMPLATE_REQ_NEW function.

12 Confirm the **MsgBox** statement has been added.

13 Click **RETURN.**

14 Log off from Quality Center.