Customizing TestTrack Workflows

The TestTrack workflow is the set of states and events that an issue follows through its lifecycle. Workflows typically represent business processes, such as hiring new employees, or development cycles, such as developing and testing a new software component. In addition, the workflow can be as simple as two states with one event moving records from state to state. Or, it can be much more complex with numerous states and events moving records between states.

TestTrack includes a default workflow that can be used ‘as is’ or can be customized to match most business processes.

Workflow elements

A workflow consists of the states, events, and transitions that move an issue, or record, through the project.

- **States** are a step in the workflow, or where a record resides in a project. All new records first reside in the ‘Open’ state. Each defined state must have an attribute of ‘Open’ or ‘Closed’.

- **Events** are the actions or activities performed on records. Events may change the status of a record by moving the record to another state. For example, the ‘Force Close’ event moves a record to the ‘Closed’ state in the default workflow.

- **Transitions** define the events that can be performed at each state. For example, the ‘Fix’ and ‘Force Close’ events are available at the ‘Open’ state in the default workflow.

Planning a workflow

Before you customize the workflow, take the time to diagram and understand your company’s business process. Analyzing your workflow helps you easily determine the states that are used, the actions that users perform, and how information moves through the workflow. A clearly-defined workflow ensures that issues move from initial reporting to resolution and do not get stranded. In addition, consider the business process, the individuals involved in the process, the types of events they perform, the type of data they track, and the types of transitions that are used.

After you analyze the workflow you should be able to list most states, events, and transitions used throughout the process. To begin customization you should first create the workflow states then define the events that can be performed for each state. You can also view a graphical representation of the workflow to help understand how the states, events, and transitions work together.

Keep the following in mind before you begin customizing the workflow:

- Make a copy of the project you want to modify and use the copy as your starting point.

- It may be easier to begin by removing unneeded states and events from the default workflow instead starting with an empty workflow.

- You can reset the workflow as long as there are no records in the project.

Workflow example

The following workflow corresponds to a company’s interview process. The workflow is customized to provide an easy and convenient way for the human resources staff to track hiring new employees.

1. Start the TestTrack Client.

   Make sure you are logged in as a user with admin rights. In addition, please keep in mind that the instructions in this section are illustrated using TestTrack Pro Windows. The TestTrack Pro Web client includes the same functionality.

2. Choose Tools > Administration > Workflow.

3. Click the States tab if it is not selected.

   Delete all states, except for the ‘Open’ state. Click Yes when you are prompted to confirm the deletion or continue. The states list should only contain the ‘Open’ state.

4. Click the Events tab.

   Delete all events, except for the ‘Assign’ and ‘Comment’ events. Click Yes when you are prompted to confirm the deletion or continue. The events list should only contain the ‘Assign’ and ‘Comment’ events.

   Edit the description for the ‘Assign’ and ‘Comment’ events to more accurately convey their purpose.

5. Click the States tab.

   Edit the ‘Open’ state and rename it to ‘Prospect’.

   Add the following new states with an ‘Open’ attribute: ‘Applicant’, ‘Candidate’, ‘Final Candidate’, ‘Hold’.

   Add the following new states with a ‘Closed’ attribute: ‘Reject’, ‘File’, ‘New Hire’.

6. Click the Events tab.

   Add the following new events and select the specified resulting states:

Event	**Resulting States**
Resume Review	Hold, Applicant, Reject
Position Available	Applicant
Phone Screen	Candidate, Reject
Interview	Candidate, Final Candidate, Reject
Candidate Rejects Offer	File
Accepts	New Hire

7. Click the Transitions tab.

   Edit the current states and add the following allowed events:

State	**Allowed Events**
Prospect	Assign, Resume Review
Hold	Assign, Position Available
Applicant	Assign, Phone

	Screen
Candidate	Assign, Interview
Final Candidate	Assign, Candidate Rejects Offer, Accepts
Accepts	New Hire

8. Click the Diagram Workflow button on the Configure Workflow dialog box to view a graphical representation of the configured workflow.

Modifying the workflow

The workflow can be modified after records are added to the project. The only restriction is you cannot remove a state if records are currently in that state. As your company's needs change, the workflow processes you implemented can also change to meet those needs.

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