

# Configuring TestTrack Email Tracking

**Note:** This information applies to TestTrack 2008 and later.

Email tracking saves emails sent about specific defects, requirements, requirement documents, test cases, and test runs with the record. Tracked emails can be viewed on the record Overview or Email tab.

When a tracked email is sent, it includes a tracking cookie that identifies the TestTrack project, the email, and the record it was sent from. The SMTP headers are configured to use either the user's email address or the project email notification account email address (if the email is sent by a system notification trigger) as the 'From' user. The TestTrack email tracking account name is used as the 'Reply To' email address in the SMTP header of the tracked email. If a tracked email is replied to, the email is sent to the email tracking account specified in the 'Reply To' SMTP header. The TestTrack Server retrieves the email from the tracking account and uses the tracking cookie to identify which project and which email the reply was sent about. The reply email is then attached as a reply to the original email and forwarded to the email account of the user who sent the original email.

Following are the steps for configuring email tracking.

## 1. Configure email sending options on the TestTrack Server

Before users can send email, you need to configure the TestTrack Server to send email. If you use email tracking, TestTrack can only send email via SMTP.

To configure email sending options, log in to the TestTrack Server Admin Utility, click Server Options, and select Sending from the Email category. Enter the SMTP account information.

## 2. Configure email tracking options on the TestTrack Server

Before TestTrack can track email, you need to configure email tracking options on the TestTrack Server. You can configure the email server and account you want to use to receive replies to tracked emails. It is important to use a dedicated email account because email received in the account is imported into TestTrack and then deleted from the account. You can automatically remove emails that do not have a TestTrack tracking cookie from the email server. We recommend selecting this option if the email account receives spam or other email you do not want to import into TestTrack.

To configure email tracking options, log in to the TestTrack Server Admin Utility, click Server Options, and select Tracking from the Email category. Enter the email tracking POP3 account information.

## 3. Enable email sending for the project

You need to enable email sending for each TestTrack project that users will send email from. To enable email sending in the TestTrack Client, choose Tools > Administration > Project Options and select the Email category.

## 4. Enable email tracking for the project

You need to enable email tracking for each project you want to track email for. To enable email tracking in the TestTrack Client, choose Tools > Administration > Project Options, select the Email category, and select Enable email tracking for this project.

## 5. Configure a notification account email address

When a system notification trigger rule sends a tracked email, the notification account email address is used as the 'From' email account. This account is also used if user responds to the tracked system notification email address. To configure a notification account email address in the TestTrack Client, choose Tools > Administration > Project

Options and select the Email category.

## 6. **Make sure that users have valid email addresses**

To send and receive emails, users must have a valid email address associated with their user record in TestTrack. To view or change a user's email address in the TestTrack Client, select a user on the Users list window and click Edit.

## 7. **Create email templates**

Users can select an email template when they send an email. TestTrack includes standard templates that can be customized, or you can create your own templates. To customize email templates in the TestTrack Client, choose Tools > Administration > Email Templates.

## 8. **Enable email tracking commands for security groups**

The ability to work with tracked email is controlled by command security. To enable email tracking commands for a security group in the TestTrack Client, select a group on the Security Groups list window and click Edit. Enable any of the following commands in the Defects, Test Cases, or Test Runs command security categories: Send Tracked Email, Reply to Tracked Email, View Tracked Email, or Delete Tracked Email.

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Helix ALM (formerly TestTrack) -> Configuring TestTrack Email Tracking

<http://www.seapine.com/knowledgebase/index.php?View=entry&EntryID=426>