

Using the TestTrack Outlook Add-in

The TestTrack Outlook add-in allows you to add Microsoft Outlook emails as new defects, requirements, requirement documents, or test cases or as tracked email to existing items in TestTrack. The add-in is compatible with Outlook 2003, 2007, and 2010.

Installing the add-in

If Outlook is installed, you are prompted to install the add-in when installing the TestTrack Client. The add-in is installed in the same directory as the TestTrack Client.

Keep the following in mind:

- Close Outlook before installing TestTrack.
- The add-in requires the Microsoft .NET 2.0 Framework, Visual Studio 2005 Tools for Office, and Office Primary Interop Assemblies. If these tools are not installed, they are automatically installed with the add-in. However, if you are using Outlook 2010 and the Primary Interop Assemblies are not installed, you must manually install them before installing the add-in. See the [TestTrack Outlook 2010 Add-in Does Not Work](http://www.seapine.com/kb/questions/1617) knowledgebase article (www.seapine.com/kb/questions/1617) for information about installing the assemblies.
- When you start Outlook after installing the add-in, a TestTrack menu and toolbar are added to Outlook. See [Troubleshooting, page 3](#) for help if the menu and toolbar are not available.

Configuring the add-in settings

You can set your preference for connecting to TestTrack manually or automatically when Outlook starts.

1. In Outlook, choose **TestTrack > Settings**.
The TestTrack Outlook Add-in Settings dialog box opens.
2. Select an option for what the add-in should do when Outlook starts.
3. Click **OK** to save the settings.

Connecting to a TestTrack Server

Before you can add emails from Outlook to a TestTrack project, you must connect to the TestTrack Server and project.

1. In Outlook, choose **TestTrack > Connect to Server**.
The TestTrack Login dialog box opens.
2. Select the **Server** you want to connect to. Click **Setup** if you need to add a server.
3. Enter your **Username** and **Password** or select **Use single sign-on** to log in with your network credentials.
4. Click **Connect**.
5. Select a **Project**. Click **Refresh** if the project you want to connect to is not listed.
6. Click **OK**.

You are connected to the TestTrack project.

Switching projects

To switch to a different project, choose **TestTrack > Switch Project**, select the project, and click **Switch**.

Connecting to a different server

To connect to a different server, choose **TestTrack > Connect to Server**. Click **Yes** when prompted to close the open project. Select the server, enter the login information, and click **Connect**.

Disconnecting from a server

To log out of a project or disconnect from a server, choose **TestTrack > Logout and Disconnect**. Click **Yes** when prompted to close the project and server connection.

Creating an item from an email

You can create a TestTrack item from Outlook. The email subject is used as the item summary and the email body is used as the item description.

1. In Outlook, select an email and choose **TestTrack > Create Item from Email**.
The Select Item Type dialog box opens.
2. Select the type of item to create and click **OK**.
The Add dialog box opens. The available fields depend on item type.
3. Enter any additional information. For example, you may want to change the Found By user to the customer who sent the email.
4. Click **Add**.
The item is saved and added to the project.

Attaching an email to an existing item

If you receive an email that applies to an existing TestTrack item, you can attach it to the item.

Note: Email tracking must be enabled for the project before you can attach Outlook emails to TestTrack items. Ask your TestTrack administrator for information.

1. In Outlook, select an email and choose **TestTrack > Attach Email to Item**.
The Attach Email to Item dialog box opens.
Note: This dialog box includes many of the same functions as list windows. For example, you can filter or search for specific items.
2. Select an item **Type**.
3. Select the item to attach the email to and click **Add**.
The email is added to the TestTrack item.

Troubleshooting

If the TestTrack menu and toolbar are not available in Outlook after installing the add-in and rebooting the computer, the add-in needs to be enabled.

Outlook 2003

1. In Outlook, choose **Tools > Options**.
The Options dialog box opens.
2. Click the **Other** tab and then click **Advanced Options**.
The Advanced Options dialog box opens.
3. Click **COM Add-Ins**.
4. Select **TestTrack Outlook Add-in**.
5. Click **OK** to save the changes.
6. Click **OK** to close the Advanced Options dialog box.
7. Click **OK** to close the Options dialog box.
8. Close and restart Outlook.

Outlook 2007

1. In Outlook, select **Tools > Trust Center**.
2. Click the **Add-ins** category.
3. Select **COM Add-ins** in the Manage field at the bottom of the dialog box and click **Go**.
The COM Add-Ins dialog box opens.
4. Select **TestTrack Outlook Add-in**.
5. Click **OK** to save the changes.
6. Close and restart Outlook.

Outlook 2010

1. In Outlook, select **File > Options**.
2. Click the **Add-Ins** category.
3. Select **COM Add-ins** in the Manage field at the bottom of the dialog box and click **Go**.
The COM Add-Ins dialog box opens.
4. Select **TestTrack Outlook Add-in**.
5. Click **OK** to save the changes.
6. Close and restart Outlook.