10 Tips for Importing Microsoft Word Requirement Documents into TestTrack RM

You can get started quickly with TestTrack RM by importing existing requirement documents from Microsoft Word. A simple wizard guides you through the import process and allows you to preview requirements before you start the import.

Before you import a Word document, make sure you review the following tips to ensure the most successful outcome. A little preparation will result in a higher quality import.

The Process of Importing Word Documents

In addition to performing the actual import, the Word document import process also includes:

- Preparing the Word document for importing
- Configuring requirement types in TestTrack RM
- Testing the import
- Adding additional information to new requirements after importing

1. Prepare the Microsoft Word Document Before Importing

Before you import a Word document, take the time to prepare the document to ensure the resulting requirements in TestTrack RM match the Word document as closely as possible.

Use formatting compatible with TestTrack RM

TestTrack RM imports text, images, tables, and hyperlinks from Word documents. Some formatting is not compatible with TestTrack RM and may be changed during the import or not imported at all.

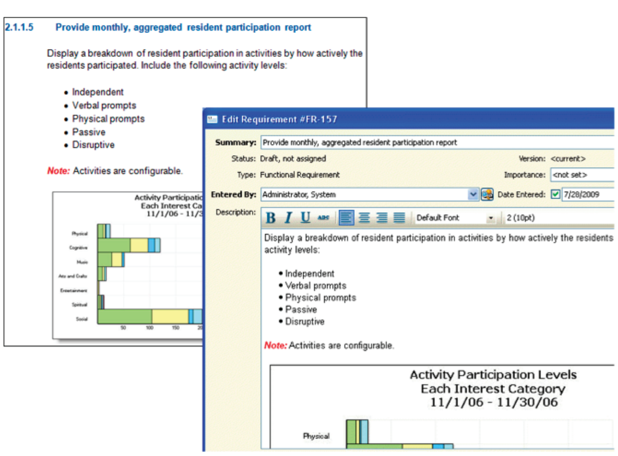

Figure 1: Most Word formatting is preserved in the imported requirement description

The content added to the requirement Summary field uses the default TestTrack format. The formatted content that is imported into the requirement Description field is preserved.

Use the following format guidelines to ensure the imported requirement description content matches the Word document as closely as possible.

- Numbered lists–Do not use numbered lists in description text. If numbered lists must be imported, add them to a table. These lists always start with 1 and numbering cannot be restarted. Numbered lists that are not in tables are converted to bulleted lists during the import.
- Bulleted lists–Use the default bullet symbol. Other bullet symbols are converted to the default symbol during the import.
- Multi-level lists–Do not use multi-level lists in description text. The levels are flattened to a single level during the import.
- Images–Only use pixel-based images, such as GIF, JPG, PNG, or TIF, or vector-based images, such as EMF, PICT, or WMF. Images and shapes in other formats are not imported. Vector-based images are attached to requirements instead of displayed inline. A single requirement can include only 100 images. For best results, see if any images are missing in the import preview and change the format in the Word document before importing.
- Tables–Do not apply formatting to tables. Table formatting is removed during the import and the default TestTrack format is used. However, table cell formatting is preserved.
- Hyperlinks–Do not apply formatting to hyperlinks. Formatting is removed during the import and the default TestTrack format is used.
- Tracked changes–Accept or reject changes before importing. Added and deleted text is imported, but the track changes formatting (underline and strikethough) is removed.
- Comments–Remove comments before importing or add them as regular text in the document. Comments are not imported.

Keep in mind that requirement Summary and Description field character limits are enforced during imports. The requirement summary is limited to 256 characters and is truncated if it exceeds the limit.

Use section breaks to separate requirements from other content

The Word document may include content that should not be imported, such as a title page, table of contents, or glossary. Or, you may only want to import a portion of a document. Add section breaks to the Word document to separate this type of content from requirements you want to import. When you set up the import, you can choose to import all sections of the Word document or a range of sections.

Break large documents into smaller documents

If the Word document is large or includes groups of different requirement types, you may want to split it into smaller documents to make the import process more manageable. You can append requirements from additional imports to existing requirement documents in TestTrack RM.

2. Configure TestTrack RM Before Importing

Before you import, you may need to create a new TestTrack RM project for testing purposes and configure the requirement types your organization uses.

Create a TestTrack RM project for testing

You will use trial and error to figure out the best way to import Word documents. You should create a separate TestTrack RM project with limited user access to perform import testing. After you successfully import the document into the test project, you can easily import the document into a project in your production environment.

Configure requirement types

Every requirement has an assigned requirement type. By default, TestTrack RM includes the following requirement types: business requirement, functional requirement, and non-functional requirement.

Evaluate the Word document you are importing to determine if you need to add requirement types or remove any of the default types in TestTrack RM. To configure requirement types, choose Tools > Administration > Requirement Types.

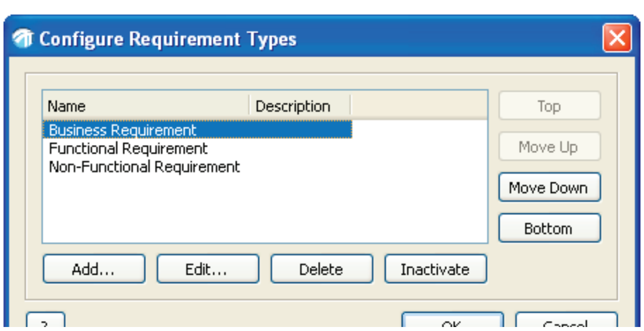

Figure 2: Configure requirement types before importing

3. Select an Import Interpretation Method

When you import a Word document, TestTrack RM divides the document into individual requirements. You can choose to create requirements in TestTrack RM based on styles used in the document or list items. The method you select in the Microsoft Word Import Wizard depends on the structure of the Word document and the type of requirements the document includes.

Styles interpretation method

The Styles import interpretation method gives you the most control during the import. You can map any paragraph style used in the Word document to any requirement type configured in the TestTrack RM project. For example, if you use a Heading 1 style for business requirements and a Heading 2 style for functional requirements, you can map each style to the corresponding requirement type.

If you use the Styles method, TestTrack RM creates new requirements for each paragraph that uses a style mapped to a requirement type. The first paragraph is used as the requirement Summary value. Subsequent paragraphs are used as the requirement Description value until a paragraph that uses a style mapped to a requirement type is found, which creates another new requirement.

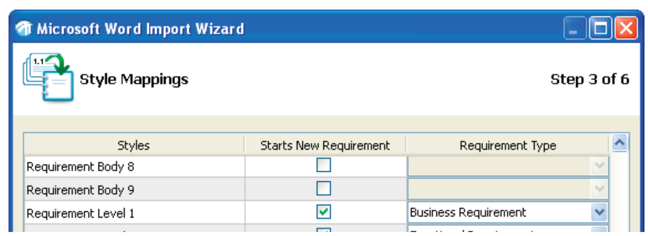

Figure 3: Map Word document styles to requirement types to create new requirements

Outline interpretation method

The Outline import interpretation method creates a new requirement for every list item in the Word document. You cannot map Word paragraph or list styles to requirement types. For example, each item in a numbered list is a new requirement. Bulleted list items can be treated as new requirements or included as requirement description text under the parent list item.

This method does not offer as much flexibility as the Styles method because you can only choose one default requirement type for all requirements and you cannot control which requirements are imported. However, you can change the individual requirement types and remove requirements you do not want to import when you preview the import.

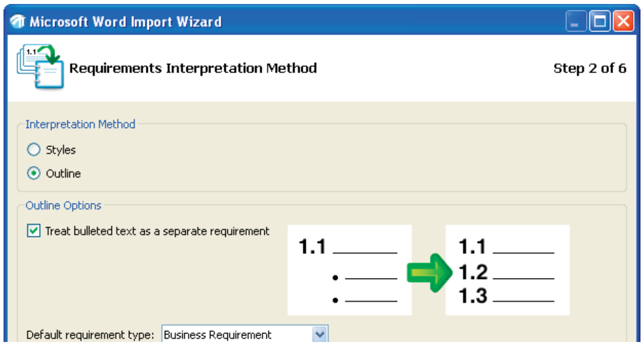

Figure 4: Treat bulleted items as new requirements or as requirement description text

How to choose an interpretation method

If you use styles in the Word document, use the Styles method. If you do not use styles, the Outline method may work better for you. The easiest way to select the correct interpretation method is to set the import options in the import wizard, preview the requirements using each method, and choose the method that displays the requirements in a structure most similar to the Word document.

4. Establish a Requirement Hierarchy

TestTrack RM uses list levels from the Word document to determine a requirement's position in the requirement document hierarchy. If the Word document does not use list levels, the imported requirement hierarchy is flat in the requirement document. If you use multi-level lists in Word, the document uses list levels.

If you use Word styles, but do not use an outline structure in the document, you may need to modify the styles to create the hierarchy. A quick way to modify the styles is to import styles from one of the Word export templates installed with TestTrack RM. The appearance of the Word document may change slightly, but this does not affect the formatting of requirement descriptions imported into TestTrack RM.

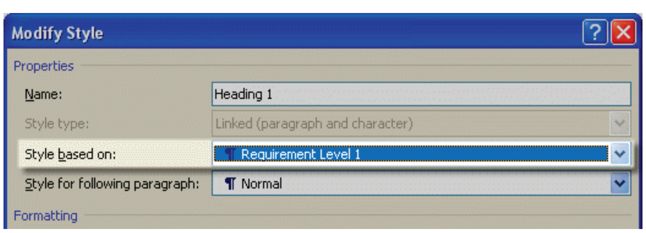

Figure 5: Use pre-defined styles to add levels to the Microsoft Word document

To set levels:

1. Open the requirement document and a template in the templates directory in the TestTrack application directory (e.g., C:\Program Files\Seapine\TestTrack\templates).
2. Import the Requirement Level 1 through Requirement Level 9 paragraph styles into your Word requirement document.
3. Base the styles you are using for the requirement summary text on the corresponding Requirement Level styles. For example, if you use Heading 1 and Heading 2 styles, base Heading 1 on Requirement Level 1 and Heading 2 on Requirement Level 2.

Refer to the Microsoft Word documentation for help importing and modifying Word styles.

5. Preview the Import

After you select the import options, preview the requirements that will be imported. The import preview is your opportunity to see exactly how requirements will be imported to TestTrack RM. You can make adjustments in the preview to ensure requirements are imported correctly before you start the import.

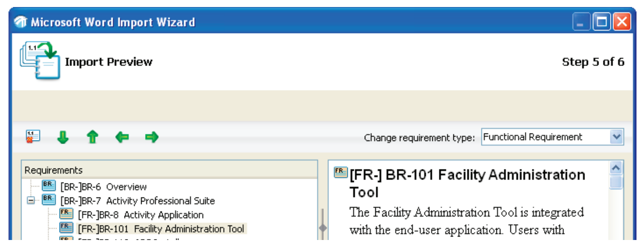

Figure 6: Preview the import to view the resulting requirements and organization

To preview a requirement description, select the requirement in the Requirements list. You can also make the following changes in the import preview.

- To change a requirement's type, select a requirement type from the Change requirement type list.
- To rearrange the order of the requirements, click the arrow buttons.
- To remove a requirement from the requirement document, select a requirement and click the Delete button.

If you want to change the import settings, navigate back in the import wizard, change the settings, and then preview the import again. If the Word document needs changes, such as fixing a formatting issue or missing image, make the change, save the document, and navigate back in the import wizard to reload the preview.

6. Create an Import Template

When you are satisfied with the import preview, create an import template to save the import settings. The import template includes the interpretation method and any additional options set during this import, which can be helpful if you use the same structure for all your existing requirement documents. The next time you import a document, you can save time by loading the import template and using the saved settings.

7. Test the Import

After you finalize the import settings, import the Word document into the test project. Any errors encountered during the import are displayed and can be saved to help you troubleshoot. If the import is successful, the requirement document and requirements are added to TestTrack RM.

When the import is complete, open the requirement document in the Specification Document window to view the imported requirements. Check the requirement document closely to make sure you are satisfied with the import. If you decide to make changes to the Word document, you can reimport as many times as needed to get the expected results. You should delete any incorrectly imported requirements before you import them again. Remember to create a new import template if you change any import settings.

8. Import the Document into the TestTrack RM Project

When you are ready, import the Word document into the TestTrack RM project in your production environment. Load the import template to use the same settings from the test project. Also remember to add any new requirement types you created in the test project.

9. Create a Requirement Document Snapshot

After the import is complete, you may want to create a requirement document snapshot before the imported requirements begin to change. A snapshot is a version of a requirement document used to compare against other versions to view the differences.

To create a snapshot, select the requirement document and choose Activities > Create Snapshot.

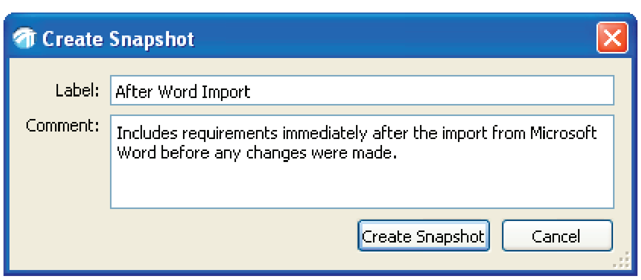

Figure 7: Create a snapshot to capture the imported requirements in their initial state

10. Update the Imported Requirement Fields and Status

Before other users start working with requirements, take the time to set requirement fields and move requirements to the correct status.

Set requirement fields

TestTrack RM allows you to capture additional information for each requirement using fields, such as importance, owner, or any custom field you create. You need to set these fields after the import because they are not populated during the import.

Before you can set values in requirement fields, you may need to add field values to the project. To add field values, choose Tools > Configure List Values and select the field type.

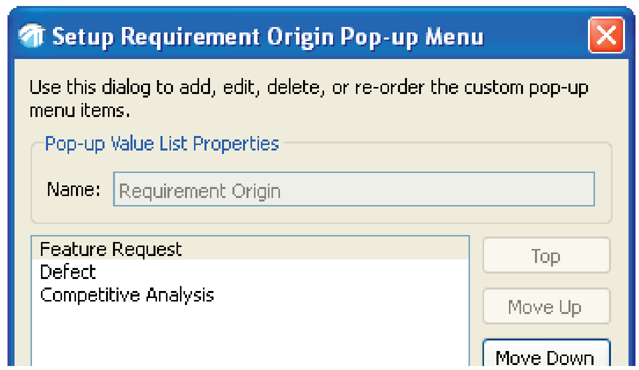

Figure 8: Configure list values for requirement fields

You can modify requirement fields individually, but it is time consuming if you are working with a large number of imported requirements. Instead, you can update multiple fields at once. The easiest way to do this is to filter the Requirements list window to select the specific requirements you want to update. You can also add the Document List column to the Requirements list window and sort it to locate all requirements in a specific requirement document.

To make changes to multiple requirements, select the requirements and choose Activities > Bulk Requirement Changes.

After you set field values, optionally create another requirement document snapshot.

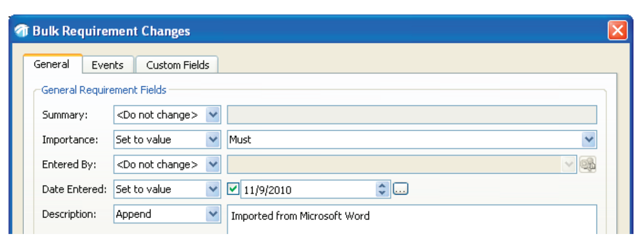

Figure 9: Use bulk requirement changes to update multiple requirements

Move requirements to the correct workflow state

Imported requirements are in the Draft status by default. Work may have been performed on the requirements you imported. For example, some requirements in the imported document may have been approved before the import. You may need to enter requirement activities (from the Activities menu) to reflect the correct status. You can select multiple requirements on the Requirements list window to change the status of a group of requirements at once, but make sure they all have the same status.

You Are Now Ready to Manage Requirements

By following these Word import tips, you will be able to quickly populate TestTrack RM with your existing requirements and your desired requirements hierarchy. In addition, you may consider changing your requirements capture process to standardize on styles or an outline hierarchy that streamlines importing future documents.