

Triaging Defects in TestTrack

by Amy Kearns

An effective defect triage system can help you balance the demands of all decision makers, ensure high priority defects are fixed first, resolve priority conflicts, and maintain a history of defects fixed for a release. You can use TestTrack folders and filters to create a triage system that decision makers can use to indicate a defect's priority. Using a triage system includes the following benefits:

- Provides a flexible, group-based approach to defect prioritization, instead of relying on one decision maker's opinion.
- Provides a pipeline of defects to help decision makers assign high priority defects first.
- Maintains a history of who decided to fix or not fix defects for a release.

This article describes how to set up and implement a triage system for defects. You can also use this system to prioritize items in TestTrack RM and TestTrack TCM.

Setting Up a Triage System

Setting up a triage system involves identifying decision makers, determining priority levels, and configuring TestTrack to support the process.

Identify the decision makers

Decision makers determine defect priority. For example, the development manager, product manager, and QA manager may be decision makers. You can have any number of decision makers, but the likelihood of priority conflicts increases as more people are involved. The priority set by each decision maker should have equal weight.

Identify a moderator

The moderator, who manages the triage process and configures TestTrack, is responsible for:

- Creating TestTrack folders and filters.
- Adding and removing decision makers. If a new decision maker is identified or a decision maker is no longer involved in the process, the moderator needs to modify the TestTrack folders and filters to reflect the change.
- Training new decision makers on the triage process.
- Evaluating and resolving conflicts when two or more decision makers prioritize defects differently. The moderator can view priority conflicts in TestTrack and contact the decision makers so they can negotiate and agree on priorities.

Identify the priority levels

The moderator and decision makers need to determine the priority levels to use for defects. You may have a simple system with Immediate, Before Release, and Future Release priorities, or a more complex system that involves more specific version information.

Create folders

The moderator creates a folder for each decision maker with subfolders for each priority level. Decision makers will add defects to the appropriate priority folder to triage defects. The folder structure you use depends on your process.

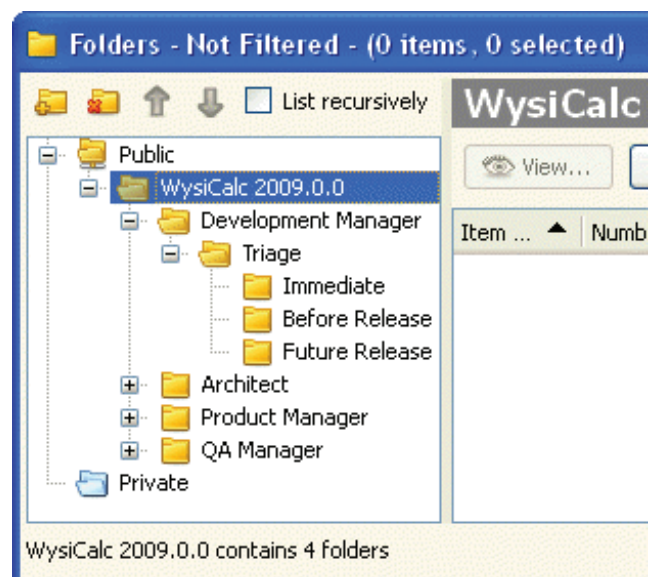


Figure 1: Folders list window with triage folders

Create filters

The moderator creates filters used to display defects that have not been triaged or have priority conflicts. The filters should include restrictions based on the triage folders. Following are some recommended filters:

- Not Triaged By Anyone—Displays defects that are not in any triage folders.
- Not Triaged By <decision maker>—Displays defects that are not in triage folders for a specific decision maker. Decision makers can use this filter to view the defects they need to evaluate and prioritize.
- Priority Conflicts—Displays defects that are in different priority triage folders for two or more decision makers. Moderators can use this filter to view priority conflicts between decision makers.

You may also want to create additional filters to display defects with a specific priority. Priority-based filters can help decision makers assign higher priority defects first.

Triaging Defects

After you create the triage system, decision makers can evaluate defects at any time and the moderator can monitor defects that are not prioritized or that have conflicting priorities.

View defects to triage

Decision makers can filter defects to see which ones are not prioritized. In the Defects list window, select 'Not Triaged By Anyone' from the Filter list.

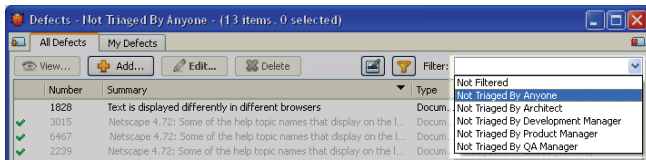


Figure 2: Defects list window with filter applied

Decision makers can also view defects they have not prioritized by applying the corresponding 'Not Triaged By <decision maker>' filter.

Add defects to triage folders

After determining a defect's priority, a decision maker can move the defect to the appropriate priority folder. To add a defect to a folder when you are viewing a defect, click the Folders tab and click Add to Folder. Select a folder in the Browse for Folder dialog box and click OK.

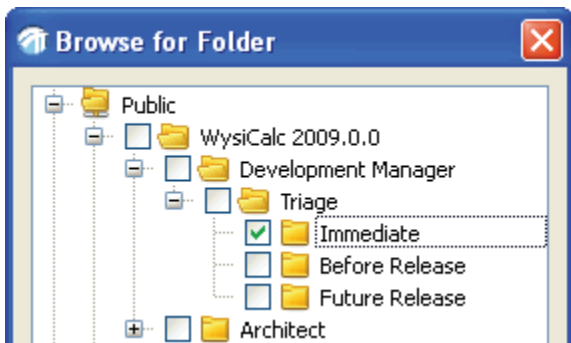


Figure 3: Browse for Folder dialog box with folder selected

About the Author

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Resolve priority conflicts

The moderator can apply the 'Priority Conflicts' filter to the Defects list window to view defects with priority conflicts. To see which folders a defect is in, view the defect and click the Folders tab. The folder path shows the different priorities and decision makers who set them.

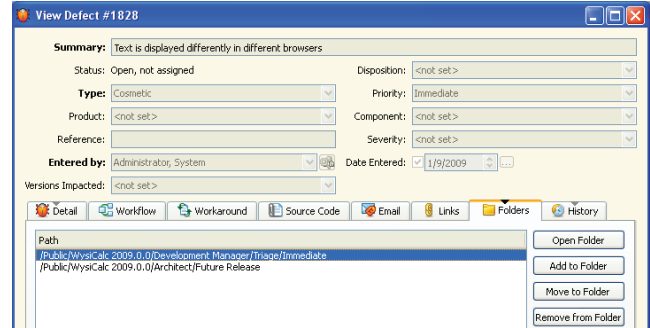


Figure 4: View Defect dialog box with Folders tab selected

After identifying conflicts, the moderator can work with the decision makers to come to an agreement on the priority.

Conclusion

Setting up a triage system in TestTrack is an effective way to provide a flexible, group-based approach to defect prioritization. Decision makers can quickly find defects they have not prioritized and assign a priority. Moderators can view priority conflicts and resolve them with the appropriate decision makers. All team members will have a clearer picture of the work to complete before a product release, which helps ensure higher priority defects are fixed first.