



Polarion® Software

# TEST STEPS MIGRATION GUIDE



## Migrating Test Steps from Work Item Description to a New Field

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# Test Steps Migration Guide

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*How to migrate Test Steps stored in the Description field of Work Items to the new Test Steps field type in Polarion 2012-SR3 (and later)*

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## Background

For manual testing, it is possible for testers to track not only the overall results of a Test Case (passed/failed), but also the results of each test step in a Test Case. There is a special Work Item field type *Test Steps*, to be used in Test Case type Work Items. Fields of this type are rendered as a table, with each row representing a discrete manual testing step. Some columns of the table are user-configurable.

In several releases of the Test Steps feature prior to version 2012-SR3, this field type and corresponding fields in Test Case type Work Items did not exist, and manual test steps were created and stored in a table in the *Description* field of Test Case type Work Items.

Beginning with version 2012-SR3, test steps are created and stored in the *Test Steps* type field described above in new projects, and project templates supporting test management pre-configure the Test Case Work Item type to contain a field of this type.

After updating from an earlier version, you may have projects created with the earlier version in which test steps data are stored in *Description* fields of Test Case items. If so, an administrator can migrate the existing test steps data to the new *Test Steps* type field using a utility job provided. This guide explains how to perform the migration.

## Prerequisites

- Administrator permissions for the project(s) you want to migrate.
- The system property `com.polarion.hideMigrationTestStepsButton` must be set to *false*. This setting is the default for version 2012-SR3. (If the *Migrate Test Steps* button does not appear as described in the following migration steps, it means this property is set to *true* and you will need to set it to *false*).

## Email Notifications

The migration job will suppress email notifications about updates to Work Items updated during the migration. Nor will the Activity Stream reflect these updates. This is because there can potentially be many updated Work Items, which would result in a great deal of email and network traffic that is really not necessary for end users.

You may want to notify your users about the migration before and/or after it is completed.

## How to Perform the Migration

### 1. Create a Custom Field for Test Steps Data

The first task is to create a custom field for the *Test Case* Work Item type.

1. Log in with administrator permissions for the project containing the test steps stored in Description fields, and open the project. Enter Administration if you are not already in it after logging in.
2. In Navigation, select *Work Items* > *Custom Fields*.
3. On the *Test Case* row, click **Edit** to launch the custom field editor.
4. On the last (empty) row, define a new custom field with ID: **testSteps**, Name: **Test Steps**, and Type: **Test Steps**.
5. Click **Save** to finish creating the custom field.

### 2. Create a Test Steps Field Configuration

The next task is to configure the user-definable columns of the Test Steps field.

1. In Navigation, select *Testing* > *Test Steps* to load the Test steps Configuration page.
2. Create a test steps configuration, making sure that the names of the Test Step Columns in the configuration are the same as the labels of columns in existing Test Steps tables in Work Item descriptions.
3. Save the Test Steps configuration. This configuration is automatically added to Global configuration on update, so it is inherited from global scope by default.

### 3. Launch the Migration Job

1. In Navigation, select *Testing* > *Configuration* to load the Testing Configuration page.
2. On the page toolbar, click the **Migrate Test Steps** button.
3. In the *Migrate Test Steps* dialog, select the Work Item type to migrate. (This is usually "Test Case" in most projects, but keep in mind that your system may be customized to use some other type as an analogue for a test case.) Select the type that originally had test steps stored in the Description field.
4. Click **Start** to launch the migration job. You can check the job's progress in the Monitor topic in the project Navigation.

## Post-migration Issues

The job processes all Work Items of the specified type in the current project. This section outlines some issues you will probably want to address following the migration.

### What If Test Steps Fail to Migrate?

It is possible that some or all test steps cannot be migrated. One reason can be that the Test Steps field configuration defines columns different from the actual Test

Steps table in Work Item descriptions. In that case, these test cases are skipped by the migration tool.

You can identify the skipped test cases in job's log in Monitor. If you want to migrate these skipped test steps, you can modify the Test Steps field configuration (*Administration > Testing > Test Steps*)<sup>1</sup> so that the column labels match the old table structure.

Another possible reason is that some Work Items already have content in the Test Steps field. Any such items are skipped by the migration and a note is written to the job log. The data in the Descriptions is not migrated and users will need to review and update them manually.

### Updating the Excel Export Template

When you update a Polarion installation prior to version 2012-SR3, the global configuration will include an export template<sup>2</sup> named `TestStepsTemplate.xlsx` that has been updated to support the Test Steps field.

You can download this template and upload it to your projects to update them with Test Steps support for off-line test execution. Because the exporter uses the first export template displayed in the project's Export Templates page (*Administration > Testing > Test Export Templates*), you should rename any existing templates that don't support the Test Steps field, and/or rename the downloaded global template before uploading it to your projects so that it appears first in the list of export templates.

### Updating the Testing Configuration

There is a set of custom fields that can be present in your project configuration which are now obsolete, and they are no longer needed in the export templates. Administrators can delete these custom fields:

- *testRun*
- *testResult*
- *testComment*
- *retest*

Having a Work Item template for the Test Case type is not necessary now, so it may be good idea to drop the template setting from your project configurations if its only purpose was to fill the default Test Steps table.

### Showing the Test Steps Field in Documents

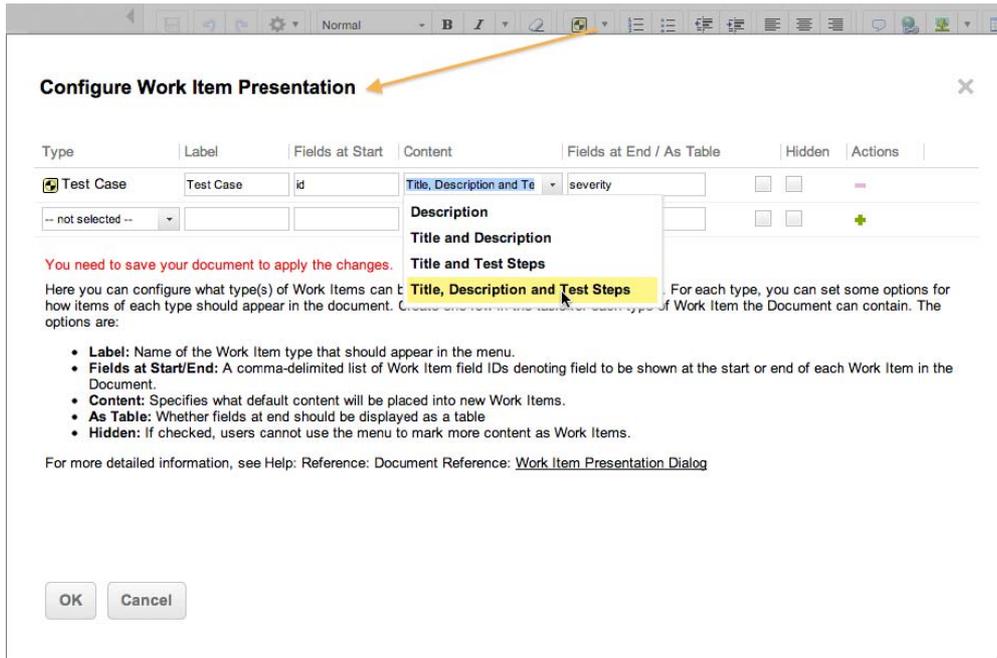
When migrated items are contained in LiveDoc documents, in order for the Test Steps field to appear in them, an administrator or Document user needs to update the Work Item presentation<sup>3</sup> in all such Documents, selecting the one of the options to show the test steps table after the migration.

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<sup>1</sup>Described previously in section *Create a Test Steps Field Configuration*

<sup>2</sup>Used to export Test Cases and Test Steps for execution outside of Polarion

<sup>3</sup>Document Editor toolbar menu item *Configure*



How to show the Test Steps field in LiveDocs

### Showing Test Steps as a Separate Field

By default, the Test Steps field you configured earlier displays in the Custom Fields section of the Work Items Table view. You can optionally have Test Steps display as a separate. To do this, you must edit the form layout for the Test Case type (*Administration > Work Items > Form Configuration*). If no Form Layout exists for the Test Case type, you can create one. (See the Administrator's Guide topic in Help: *Configuring Work Item Form Layout*).

In the layout configuration, add the Test Steps field (for example: `<field id="testSteps" />`), and remove the Test Steps field from the configured custom fields to be displayed:

```
<panel description="Custom Fields">
  <field id="@allCustomFields,-testType,-testSteps"/>
</panel>
```

### Hiding the Migrate Test Steps Button

After you have migrated all test steps data for all projects, you can optionally set the system property `com.polarion.hideMigrationTestStepsButton` to `true` in the `polarion.properties`<sup>4</sup> file to remove the *Migrate Test Steps* button from the Testing Configuration page of Administration.

<sup>4</sup>Windows: C:\Polarion\polarion\configuration; Linux: %POLARION\_HOME%/etc/