Modifying Microsoft Word Templates for TestTrack Requirement Document Exports

> **Note:** This information only applies to TestTrack 2015.1 and earlier. See the Helix ALM help for information about exporting items to Word in Helix ALM (or TestTrack 2016 - 2016.1).

You can export requirement documents from TestTrack to Microsoft Word if you need to provide the document in a format to comply with your company's or another organization's standards, or if you need to share the document with others who do not have TestTrack access.

Exported documents use a Word template to format the resulting document. TestTrack includes templates with various formats. If your exported documents need to have different formatting or information, you can modify one of the installed templates.

How requirement documents are exported

The content and appearance of a TestTrack requirement document exported to Word is controlled by the information displayed in the document and the Word template you use for the export.

The templates installed with TestTrack contain Word bookmarks, which are placeholders for exported information. When a document is exported, the bookmarks are replaced with the requirement and document information mapped to them. The templates also include styles that control the text formatting. You can use one of the Word templates installed with TestTrack as is or modify it. If you are going to modify a template, it is highly recommended that you have experience working with styles in Word.

How to choose and modify a template

Perform the following steps to choose and modify a Word template for your exported documents.

1. Display the information you want to export in the document in TestTrack.

2. Perform a test export using each Word template installed with TestTrack. Compare the exported documents to determine which template most closely matches how you want your exported Word documents to look.

3. To modify the template, change the styles, bookmarks, table of contents, cover page, and footers to match the output you want.

4. Export a document using your modified template to preview the changes. Continue modifying and previewing until the exported document meets your needs.

5. Save the Word template for future use.

Display the information to export in TestTrack

Before you export a document, make sure only the information you want to include is displayed in the TestTrack document (Document View in the Specification Document window). You can add or remove columns or filter requirements to export specific information.
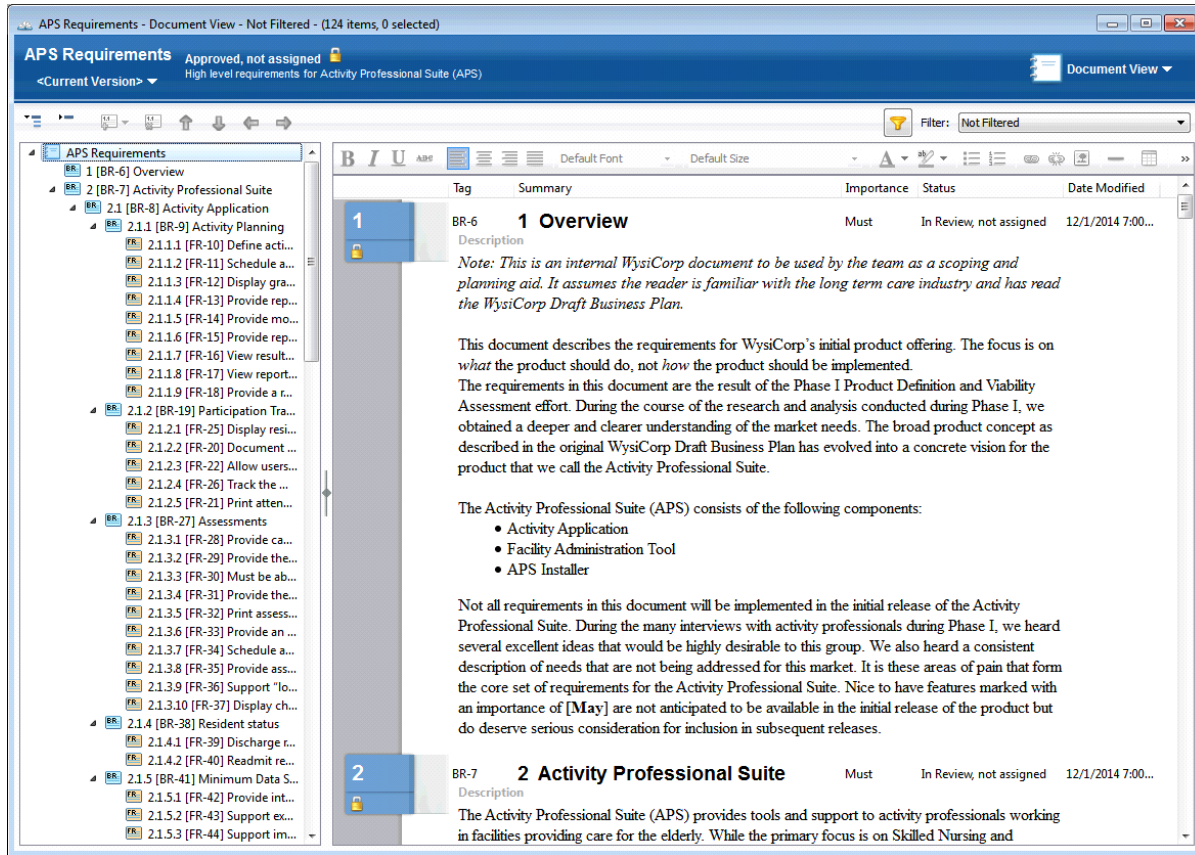
- Text and images in the requirement Description field are exported exactly as you see them.

- Information from the document Snapshots tab is also exported unless the corresponding bookmark is removed from the Word template used for the export.

To save the document view to use it for future exports, choose **View > Save As View**. To apply the saved view, open the document and choose **View > Apply View**.

Choose a template

After the document is displayed the way you want to export it, choose a Word template to use for exports. To preview the installed templates and determine which one most closely matches the look you want for your exported documents, export the document using each of the installed Word templates.

To export the document, make sure the document is open and choose **File > Export > Microsoft Word Export**.
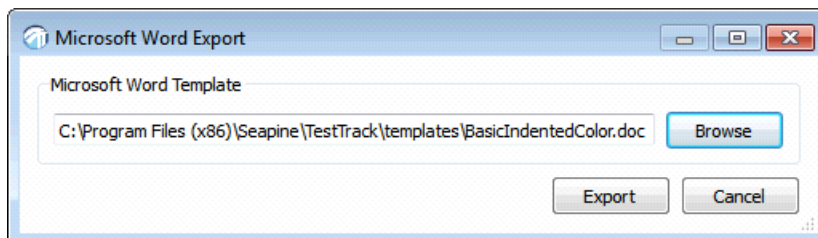
Next, click **Browse** to select a template. Templates are stored in the templates subdirectory in the TestTrack application directory (e.g., C:\Program Files\Seapine\TestTrack\templates). The following templates are available.

Template	Description
BasicIndented.doc	Indents requirements to display up to nine levels of the document hierarchy. Includes a cover page, table of contents, and footer.
BasicIndentedColor.doc	Same as BasicIndented.doc but uses blue text for the title, section headers, and requirement headings.
BasicLeftAligned.doc	Left-aligns all requirements. Includes a cover page, table of contents, and footer.
Plain.doc	Left-aligns all requirements. Does not include a cover page or table of contents.

Save the exported document with a unique filename that indicates the template you are using, such as TestExportBasicIndentedColor.doc. Repeat the export for each template, saving each file with a different name. Open each exported Word document to preview it and decide which template to use.

Modify the template

If your exported documents need to use different formatting or include different information, modify a copy of the template closest to the appearance and content you need. Open the template in Word and save it with a unique filename. It is important to distinguish your modified template from the installed templates to avoid overwriting any changes when you upgrade or reinstall TestTrack.

You can modify the bookmarks, styles, and other parts of the template to change the exported document content and appearance. At this point, you have two files to work with: the template file you just saved and the test export file you used previously. We recommend viewing these files side-by-side as you modify your template. You can preview and fine tune changes in the test file and then copy and save the changes in the template file. This will help you modify the template without adding unnecessary content or deleting the required bookmarks.

> **Note:** The following information applies to modifying templates in Word 2010. Refer to the Word help if you use a different version.

Bookmarks

Bookmarks are placeholders for requirement and document information in the Word template. When a document is exported, information is populated in the resulting document based on the location of the corresponding bookmark in the template.

To view bookmarks in the template, choose **File > Options** and click the **Advanced** category. Select **Show bookmarks** in the Show document content area and click **OK**. I-beams are used to indicate a bookmark. When a document is exported, text that replaces a bookmark is displayed in square brackets.
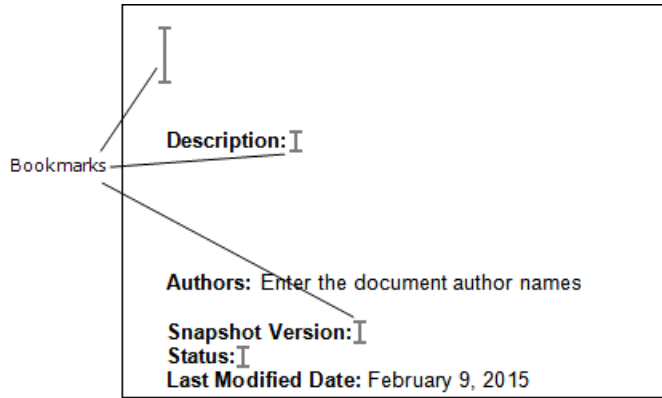
The following bookmarks are included in the installed Word templates.

Bookmark	Templates included in	Replaced with:	Used:
MICROSOFT_ WORD_ EXPORT_ TEST_ TRACK_RM	All	All requirements displayed in the document	After all front matter
MICROSOFT_ WORD_ EXPORT_ TEST_ TRACK_TITLE	BasicIndented, BasicIndentedColor, and BasicLeftAligned	Document Name field value	On the cover page
MWE_TEST_ TRACK_ RMDOC_ DESCRIPTION	All	Document Description field value	After the Description: text on the cover page
MWE_TEST_ TRACK_ RMDOC_ NAME	Plain	Document Name field value	After the Name: text on the first page
MWE_TEST_ TRACK_ RMDOC_ SNAPSHOT_ HISTORY	All	A table of information from the document Snapshots tab, including the snapshot number, Created By, Created Date, Label, and Comment field values	In the Snapshot History section after the cover page in the BasicIndented, BasicIndentedColor, and BasicLeftAligned templates and on the first page in the Plain template

Bookmark	Templates included in	Replaced with:	Used:
MWE_TEST_ TRACK_ RMDOC_ SNAPSHOT_ VERSION	All	Document snapshot version number and label based on the version displayed in document	After the Snapshot Version: text on the cover page
MWE_TEST_ TRACK_ RMDOC_ STATUS	All	Document status	After the Status: text on the cover page

To view a bookmark name, select an indicator, click the **Insert** tab, and click **Bookmark**. The Bookmark dialog box opens, which you can use to add bookmarks not included in the template or delete bookmarks. Only delete bookmarks if you do not want to include the corresponding information in the exported document.
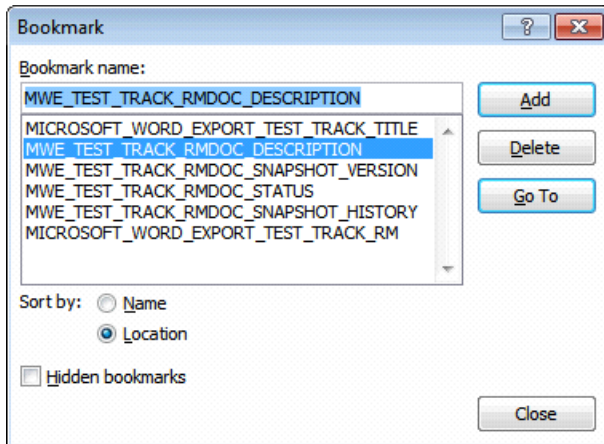
Styles

Styles are used to format text in Word documents. The templates installed with TestTrack have several paragraph and character styles that are used to automatically format exported information and other static text. See Paragraph styles, page 11 and Character styles, page 13 for information about styles used in the templates.

You can modify the styles if you want to change text properties, such as font, color, size, and spacing.

Use the Styles window to view the styles in a template. To open the Styles window, click the **Home** tab and click the arrow in the bottom right corner of the Styles area.
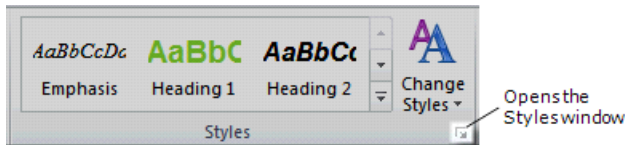
You may want to use the Style Inspector to quickly view the styles applied to text. In the test export file, open the Styles window and click ⚘. The Style Inspector pane opens and displays the style applied to selected text.
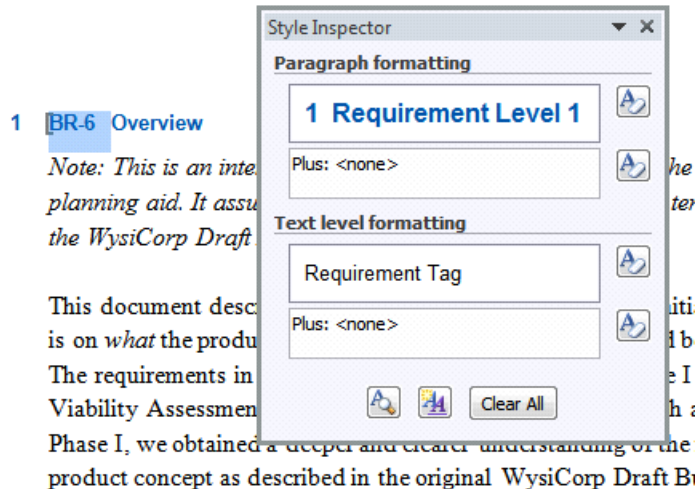
You can modify styles from the Style Inspector or Styles window. Mouse over the style you want to change, click ▾, and choose **Modify**. You can change the style properties to use the formatting you want, but do not rename or remove any styles because they are automatically mapped to format exported requirement and document information.
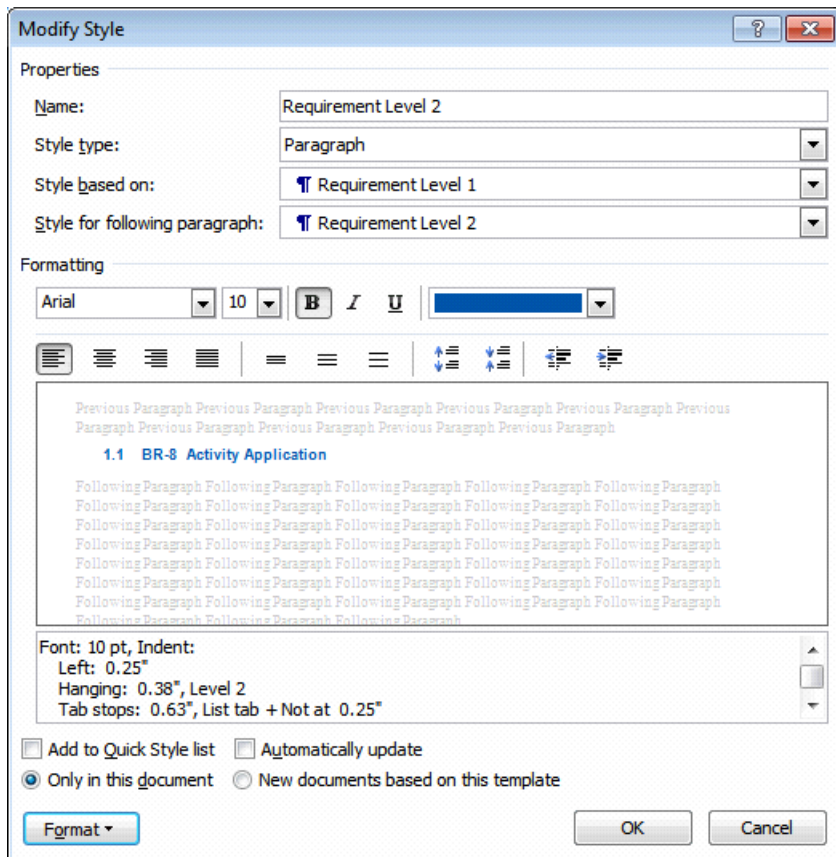
Some styles are based on other styles to maintain consistent formatting. If you change a style, any styles based on it are also automatically updated. For example, the Requirement Level 2 style is based on the Requirement Level 1 style. Any formatting changes made to Requirement Level 1 are also applied to Requirement Level 2 and any other styles based on it.

Cover page

All installed templates have a separate cover page except the Plain template. The same information from the cover page in the other templates is included on the first page of the Plain template, but there are no section or page breaks before the snapshot history information.

The following information is included on the cover page.

Component	Templates included in	Populated by:	Style used
Name	Plain	Document Name field value replaces the MWE_TEST_TRACK_RMDOC_NAME bookmark.	Requirement Document Name character style
Title	BasicIndented, BasicIndentedColor, and BasicLeftAligned	Document Name field value replaces the MICROSOFT_WORD_EXPORT_TEST_TRACK_ TITLE bookmark.	Requirement Document Title paragraph style
Description	All	Document Description field value replaces the MWE_TEST_TRACK_RMDOC_ DESCRIPTION bookmark.	Requirement Document Description paragraph style
Authors	All	'Enter the document author names' is static text that needs to be replaced after each export.	Requirement Field character style

Component	Templates included in	Populated by:	Style used
Snapshot Version	All	Snapshot version number replaces the MWE_ TEST_TRACK_RMDOC_SNAPSHOT_ VERSION bookmark. Displays <Current Version> if the exported document is the current version.	Requirement Document Snapshot Version character style
Status	All	Document Status field value replaces the MWE_TEST_TRACK_RMDOC_STATUS bookmark.	Requirement Document Status character style
Last Modified Date	All	The date the Word document was generated replaces a Word field code. The date can be manually changed, but dates cannot be retrieved from TestTrack.	Requirement Field character style

Note: Static text labels for the description, authors, snapshot version, document status, and last modified date use the Requirement Label character style.

You may want to add content, such as a logo or legal statement, to the cover page in your template. Static text or images you add are always included in exported documents and do not change between exports.

Snapshot history

All templates include a Snapshot History section, which displays the number, Created By, Created Date, Label, and Comment information for each snapshot version.

The Snapshot History section has a heading, which you can modify. The Requirement Snapshot History Header paragraph style is applied to it. The snapshot history table uses an 8pt Arial font and cannot be changed in the template. If you want to change the table appearance, you can manually modify it after each export.

Snapshot History

Snapshot	Created By	Created Date	Label	Comment
6	Bass, Bill	6/21/2014 11:45:29 AM	Approved Document	This version of the document was approved
5	Adams, Abby	6/14/2014 9:09:51 AM	Ready for approval	Document was sent out for approval
4	Bass, Bill	6/12/2014 9:00:11 AM	Change needed	Document was reviewed and changes are needed
3	Fennmore, Frank	6/9/2014 8:13:09 AM	Ready for approval	Document was sent out for approval
2	Bass, Bill	5/29/2014 8:12:36 AM	Change needed	Document was reviewed and changes are needed
1	Adams, Abby	5/26/2014 10:10:52 AM	Ready for review	Document was sent out for review

If you do not want to include the snapshot history in exported documents, delete the MWE_TEST_TRACK_ RMDOC_SNAPSHOT_HISTORY bookmark from the template.

Table of contents

All templates except Plain include a table of contents, which is automatically generated during each export. The table contains three heading levels, which are mapped to text in the exported Word document with the Requirement Level 1-3 paragraph styles applied. The TOC 1-3 paragraph styles are applied to the text in the table.

Table of Contents

You can add levels to the table of contents or change how headings are mapped to styles. Click the **References** tab and choose **Table of Contents > Insert Table of Contents**. In the Table of Contents dialog box, you can specify the number of levels to display. Click **Modify** to select the style for new levels you add.

The templates only include styles for three heading levels. If you add levels to the table, you need to update the corresponding style to match the other styles used in the table. Click **Options** to change the style mappings used in the table.
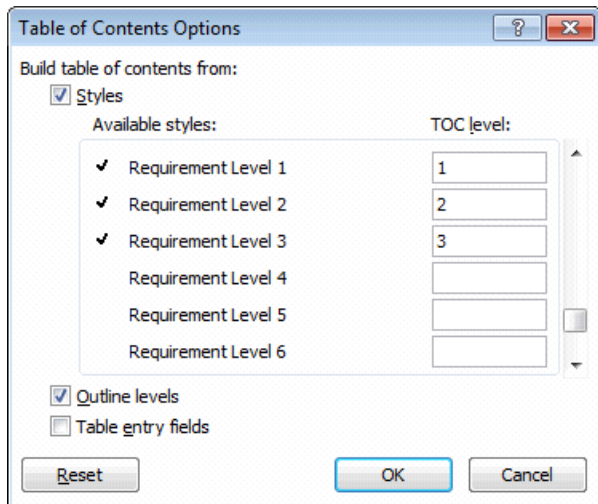
If you insert manual page breaks in an exported document or make other content changes that affect the table, you need to update it. Right-click the table and choose **Update Field**.

Requirement information

The main body of the exported document contains requirements. Requirement tags and Summary field values are used for requirement heading text. The Requirement Level 1-9 paragraph styles are applied to each heading, depending on the hierarchy in the document. For example, the Requirement Level 1 style is applied to the top-level requirements in the document and the Requirement Level 2 style is applied to immediate children of the top-level requirements.
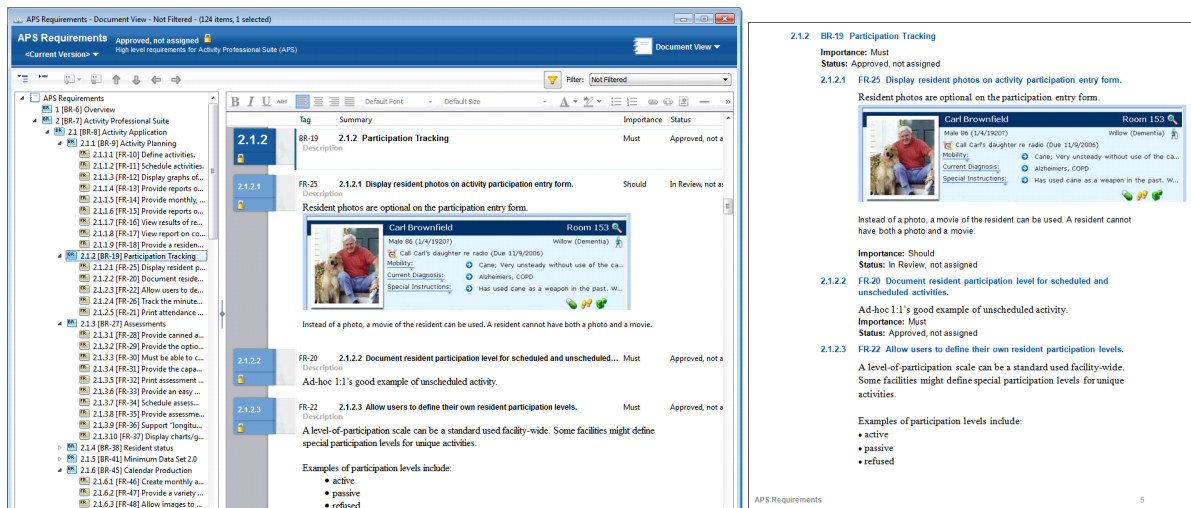
Text from the requirement Description fields is formatted using the Requirement Body 1-9 styles, also depending on the document hierarchy. Any text, table, or image formatting applied to the requirement description is maintained when it is exported, which means requirements look the same in the exported document as they do in TestTrack.

Multi-line text field values from TestTrack are displayed first in each requirement section of the exported document. The Description field label is not displayed, but other field labels are. The Requirement Multiline Label style is applied to the field labels and the Requirement Body style is applied to the field values.

Single-line text field values, such as Importance and Status, are in separate paragraphs after multi-line text values. The Requirement Label style is applied to the field labels and the Requirement Field style is applied to the field values.

In the BasicIndented and BasicIndentedColor templates, requirements are indented to reflect the document hierarchy. Requirements are not indented in the BasicLeftAligned and Plain templates. To adjust indentation for a paragraph style, click **Format** in the Modify Styles dialog box and choose **Paragraph**. Make any changes on the Indents and Spacing tab.

Section breaks

All templates except Plain use section breaks to start sections on odd-numbered pages for double-sided printing. The breaks are also used to apply different page numbering to sections.

To view section breaks, click the **View** tab and click **Draft** in the Document Views area. You can add or delete section breaks in your template, but you need to adjust page numbering and print layout settings after making changes.

Page footers

All templates except Plain have page footers, which contain the requirement document name and page numbers. Footer text is formatted using the Requirement Footer paragraph style.

Footers are slightly different for each section in the templates. The cover page and snapshot history sections do not have footer text. The table of contents section uses lowercase Roman numeral page numbers. The requirements section starts on page 1. The document name replaces a Word field in the footer.

To change a footer, double-click the footer area on a page.

Preview and save your modified template

When you finish modifying the template, perform a test export from TestTrack and use the template to preview the changes. You may need to continue modifying and exporting until the resulting document looks exactly as you want.

Save the final template in a safe place, such as in your source control application. Make sure users who need to export documents have access to the template.

Paragraph styles

The following paragraph styles are used in the installed Word templates to format requirement, document, and table of contents text.

Style	Applied to:	Notes
Requirement Body 1-9	Text exported from the requirement Description field	Used primarily for paragraph spacing and alignment because text is exported as it is formatted in TestTrack. Requirement Body 2-9 are based on Requirement Body 1. Changes to Requirement Body 1 are also applied to the related styles. Left aligned in the BasicLeftAligned and Plain templates. Indented based on hierarchy levels in the BasicIndented and BasicIndentedColor templates. Up to nine document hierarchy levels are supported. Requirements beyond 10 levels use the Requirement Body 9 style.
Requirement Document Description	Text exported from the document Description field	Used primarily for paragraph spacing and alignment because text is exported as it is formatted in TestTrack.
Requirement Document Title	Text exported from the document Name field	Formats the document title on the cover page. Black in the BasicIndented and BasicLeftAligned templates. Blue in the BasicIndentedColor template. Not used in the Plain template.
Requirement Footer	Footer text and page numbers	Not used in the Plain template.
Requirement Fields 1-9	Requirement fields (e.g., Status, Importance)	Up to nine document hierarchy levels are supported. Requirements beyond 10 levels use the Requirement Fields 9 style.
Requirement Level 1-9	Text exported from the requirement Summary field (heading for each requirement)	Numbering is based on the hierarchy of requirements in the document. Up to nine levels are supported. All requirements beyond 10 levels use the Requirement Level 9 style. Left aligned in the Plain and BasicLeftAligned templates. Indented based on hierarchy level in the BasicIndented and BasicIndentedColor templates.
Requirement Snapshot History Header	Snapshot History section title	Black in the BasicIndented and BasicLeftAligned templates. Blue in the BasicIndentedColor template. Not used in the Plain template.
Requirement TOC Header	Table of Contents section title	Black in the BasicIndented and BasicLeftAligned templates. Blue in the BasicIndentedColor template. Not used in the Plain template.
TOC 1, TOC 2, TOC 3	First three levels in the table of contents	Not used in the Plain template.

Character styles

The following character styles are used in the installed templates to apply inline formatting to requirement and document field labels.

Style	Description
Requirement Document Name	Formats text from the document Name field, which is exported as the document title on the first page in the Plain template. Not used in the BasicIndented, BasicIndentedColor, and BasicLeftAligned templates.
Requirement Document Snapshot Version	Formats text after the Snapshot Version: label on the cover page of the BasicIndented, BasicIndentedColor, and BasicLeftAligned templates or first page of Plain template.
Requirement Document Status	Formats text after the Status: label on the cover page of the BasicIndented, BasicIndentedColor, and BasicLeftAligned templates or first page of Plain template.
Requirement Field	Formats text after field labels in requirements (e.g., Status, Importance). Also formats text after static labels on the cover page, such as the last modified date. Requirement Summary and Requirement Tag character styles are based on this style.
Requirement Label	Formats static labels on cover pages (e.g., Description, Authors, Snapshot Version) and single-line field labels in requirements (e.g., Importance, Status).
Requirement Multiline Label	Formats multi-line text field labels in requirements (e.g., Source Files and custom multi-line text fields).
Requirement Summary	Formats text from the requirement Summary field in the heading for each requirement. Based on Requirement Field character style.
Requirement Tag	Formats the requirement tag in the heading for each requirement. Based on Requirement Field character style.