Triaging Issues in TestTrack

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

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

This article describes how to set up and implement a triage system for issues. 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 issue 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 issues 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 issues. 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 issues to the appropriate priority folder to triage issues. The folder structure you use depends on your process.

Create filters

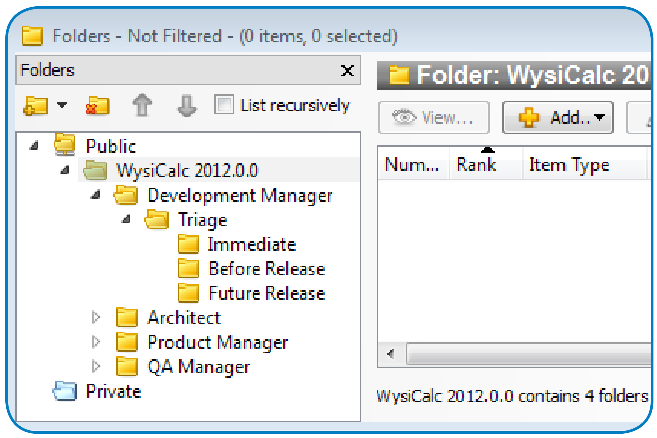

Figure 1: Folders list window with triage folders

The moderator creates filters used to display issues 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 issues that are not in any triage folders.
- Not Triaged By <decision maker> —Displays issues that are not in triage folders for a specific decision maker. Decision makers can use this filter to view the issues they need to evaluate and prioritize.
- Priority Conflicts—Displays issues 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.

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

Triaging Issues

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

View issues to triage

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

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

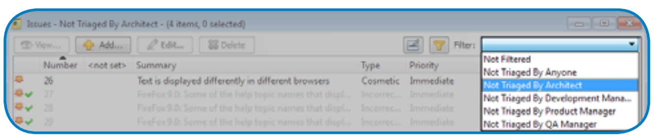

Figure 2: Issues list window with filter applied

Add issues to triage folders

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

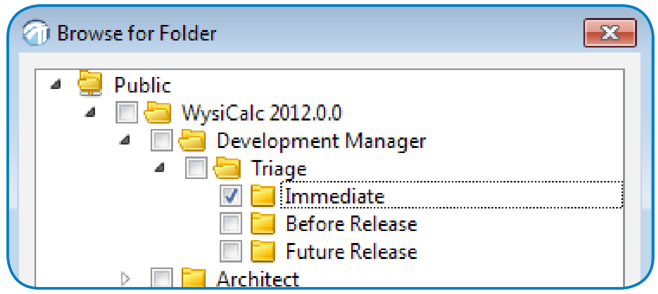

Figure 3: Browse for Folder dialog box with folder selected

Resolve priority conflicts

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

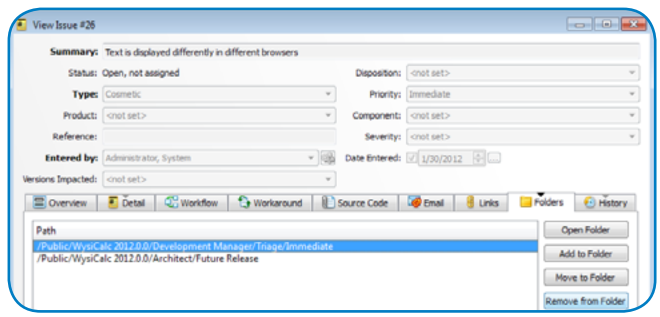

Figure 4: View Issue dialog box with Folders tab selected

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 issue prioritization. Decision makers can quickly find issues 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 issues are fixed first.

