About Product Testing

To earn confidence and trust from your customers, you are obligated to deliver products that meet their expectations. To help ensure this, you need to rigorously test every aspect of your product before its release and meticulously address any bugs identified after release. Smartsheet is the tool that helps you manage and track your entire testing and bug tracking process, from planning to execution to bug tracking.

Improve the efficiency of your testing
Collaborate on a test plan that’s easy to share and execute.

Organize your tests in one place
Document all of your tests and outcomes in a single location.

Streamline your bug tracking process
Simplify every step of your bug tracking process, from submission to prioritization to communication.
Who should use this guide

Whether you’re managing end-to-end test processes or simply participating in identifying and tracking bugs, you’re in the right place. Some common roles that will benefit from this solution include:

- Product Testing
- Product Development
- Product Management
- Product Marketing
- Product Research Management
- Program Management
- Project Management
- Quality Control

Purpose

This guide is designed to help you plan and execute a world-class testing process using Smartsheet. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

1. An overview of the solution
2. A tour of the individual sheets
3. How to get going
4. Helpful resources and cheat sheets
Components

1. **PLAN**
   - Test Plan
   - Outline a detailed test plan so everyone has what’s needed to run an efficient test process.

2. **TEST**
   - Test Log
   - Ensure every aspect of your product is rigorously and efficiently tested.

3. **FIX**
   - Bug Tracking & Submission
   - Bug Report
   - Streamline bug tracking and communication after release.

Product Testing Solution Guide
Test Plan

Errors and defects in final products can often be attributed to time constraints in the testing process. Smartsheet’s Test Plan helps you plot out every aspect of your test plan so you can execute your tests rigorously and efficiently. With built-in hierarchy to organize your information and seamless sharing to supercharge your team’s collaboration, you’ll know that everyone has what they need to ensure that your final product wins the confidence of your customers.

Organize every aspect of your test with hierarchy and collapsible groups.

Attach supporting documents so everything is in one place.

Link to another sheet, like your product requirements sheet, so collaborators can dig into the details with a single click.

Securely share the sheet with anyone involved, internal or external, with unique permission levels that you assign.
Test Log

The best way to ensure that everything’s been tested is to track all of your tests and outcomes in one place. Organize your tests by features, scenarios and test cases to make it easy to follow testing procedures and log results. And with the ability to attach files, testers can even provide the necessary information, like screenshots, to help developers fix any issues.

- Use hierarchy to organize tests by features, scenarios and test cases.
- Attach helpful information for the development team, like screenshots showing a test failure.
- Use symbols to visually communicate whether tests were passed or failed.
- Assign test owners so each tester can have a focused view of what’s assigned to them by filtering the column.
Bug Tracking & Submission

Even with the most thorough testing processes, you will inevitably uncover bugs. The hard part about is prioritizing and tracking them. Smartsheet’s Bug Tracking & Submission sheet helps you collect, prioritize and assign bugs, all in one place. Collect submissions with a web form and set email notifications when work is completed so you can spend less time on process and more time fixing bugs.

A. Set alerts to be reminded via email about the bugs that you care about.

B. Use symbols to easily assign and communicate priority for each submission.

C. Use conditional formatting to maintain focus on open bugs by greying out those marked “Resolved.”

D. Create a customizable web form to streamline your bug submission process. Submissions are automatically added to the bottom of your sheet.
Bug Report

As your bug list grows, it gets harder and harder for people to seek out the ones they care about. Build custom reports that automatically update based on the source information, like data from your Bug Tracking sheet. This makes it possible for stakeholders to create their own custom report, like one showing only those bugs they’ve submitted or only those deemed high priority.

- Create reports based on virtually any dimension from your Bug Tracking sheet.
- Easily share your report via email, PDF, or Excel on a one-time or recurring basis.
- Enable “Highlight Changes” so you can quickly spot what’s changed since you last viewed the sheet or what’s changed in a specified time period.
Jump-Start Your Product Testing with Smartsheet

- **Read through the solution guide**
  You’ve had an overview of the solution – now try Smartsheet for yourself.

- **Sign up or log in to Smartsheet**
  Sign up at [smartsheet.com/solutions](http://smartsheet.com/solutions). You can also use this with your existing account by logging in.

- **Open the Getting Started Sheet**
  Once you’re in Smartsheet, click on the “Getting Started” sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.

- **Customize the sheet**
  The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.

- **Start working and sharing**
  To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.
### Other Recommended Steps

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete sheets you don’t need</td>
<td>Deleting a sheet is easy! You can learn how to <a href="#">here</a>.</td>
</tr>
<tr>
<td>Build your own sheet</td>
<td>We know you have unique needs – that’s why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.</td>
</tr>
<tr>
<td>Use the “cheat sheets” in this guide</td>
<td>To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.</td>
</tr>
</tbody>
</table>
Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center** - help.smartsheet.com
   
   Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community** - community.smartsheet.com
   
   Ask questions, share best practices, and get help.

**Submit your question** - solutions@smartsheet.com
   
   Want personalized help? Our design and services teams have you covered!

**Send us your feedback** - help.smartsheet.com/customer/portal/emails/new
   
   Share your thoughts or suggestions about Smartsheet or our Solutions.

**Plans and Pricing** - smartsheet.com/pricing
   
   Enjoy your 30-day free trial.
Smartsheet Cheat Sheet

Keyboard Shortcuts

Basics

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>F2 / Fn + F2</td>
<td>Enters edit mode on selected cell</td>
</tr>
<tr>
<td>Ctrl + S</td>
<td>Saves all unsaved information</td>
</tr>
<tr>
<td>Ctrl + Z</td>
<td>Undos the previous action since last save</td>
</tr>
<tr>
<td>Ctrl + Y</td>
<td>Redos the previous action since last save</td>
</tr>
<tr>
<td>Ins</td>
<td>Inserts a row above the selected row.</td>
</tr>
</tbody>
</table>

To insert multiple rows at once, press Shift + Ins.

Formatting

<table>
<thead>
<tr>
<th>Key Combination</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + Enter</td>
<td>Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the Wrap icon in the left toolbar.</td>
</tr>
<tr>
<td>Alt + Enter</td>
<td>(or)</td>
</tr>
<tr>
<td>Ctrl + K</td>
<td>Indents Primary Column only</td>
</tr>
<tr>
<td>Ctrl + M</td>
<td>Outdents Primary Column only</td>
</tr>
<tr>
<td>Ctrl + I</td>
<td>Italic</td>
</tr>
<tr>
<td>Ctrl + B</td>
<td>Bold</td>
</tr>
<tr>
<td>Ctrl + U</td>
<td>Underline</td>
</tr>
</tbody>
</table>

NOTE: Mac users should use Cmd instead of Ctrl unless otherwise noted.
Formulas

- **Ctrl + L x 1** Inserts $ before column name (horizontal cell reference lock).
- **Ctrl + L x 2** Inserts $ after column name (vertical cell reference lock).
- **Ctrl + L x 3** Inserts $’s around column name (full cell reference lock).

Date Column Cells

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>t</td>
<td>Inserts today’s date.</td>
</tr>
<tr>
<td>+</td>
<td>Enters date x days from today.</td>
</tr>
<tr>
<td>-</td>
<td>Enters date x days before today.</td>
</tr>
<tr>
<td>mon / tue / wed / etc...</td>
<td>Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.</td>
</tr>
<tr>
<td>yes</td>
<td>Inserts yesterday’s date.</td>
</tr>
<tr>
<td>tom</td>
<td>Inserts tomorrow’s date.</td>
</tr>
<tr>
<td>next week</td>
<td>Inserts date seven days from today.</td>
</tr>
<tr>
<td>last week</td>
<td>Inserts date from seven days ago.</td>
</tr>
<tr>
<td>Dec 15 / Jan 3 / etc</td>
<td>Inserts date of string entered.</td>
</tr>
</tbody>
</table>

Additional

- **Ctrl + /** Displays the Open a Sheet form.
- **Ctrl + G** Displays the Go To Row form. Type in the row number you’d like to scroll to then click OK.
- **Home** Takes you to the first cell of the row you are currently on.
- **End** Takes you to the last cell of the row you are currently on.
- **Pg Up** Moves you up in your sheet.
- **Pg Dn** Moves you down in your sheet.
- **Ctrl + Home** Takes you to the top left cell of your sheet.
- **Ctrl + End** Takes you to the bottom right cell of your sheet.
- **Space** Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our Column Types article.
<table>
<thead>
<tr>
<th>Formula</th>
<th>Description</th>
<th>Example</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUM()</strong></td>
<td>Adds selected values, or a range of cells.</td>
<td>=SUM(Cost1: Cost5)</td>
<td>1125.75</td>
</tr>
<tr>
<td><strong>AVG()</strong></td>
<td>Averages selected values, or a range of cells.</td>
<td>=AVG(Cost1: Cost5)</td>
<td>225.15</td>
</tr>
<tr>
<td><strong>MAX()</strong></td>
<td>Returns the highest numeric value, or latest date.</td>
<td>=MAX(Cost1: Cost5)</td>
<td>425.75</td>
</tr>
<tr>
<td><strong>MIN()</strong></td>
<td>Returns the lowest numeric value, or earliest date.</td>
<td>=MIN(Cost1: Cost5)</td>
<td>100</td>
</tr>
<tr>
<td><strong>INT()</strong></td>
<td>Returns the integer portion of a given number.</td>
<td>=INT(Cost5)</td>
<td>425</td>
</tr>
<tr>
<td><strong>ROUND()</strong></td>
<td>Rounds a given number to the desired # of digits.</td>
<td>=ROUND(Cost5, 1)</td>
<td>425.8</td>
</tr>
<tr>
<td><strong>ABS()</strong></td>
<td>Returns the absolute value of a given number.</td>
<td>=ABS(-85)</td>
<td>85</td>
</tr>
<tr>
<td><strong>COUNT()</strong></td>
<td>Counts non-blank cells in a given range.</td>
<td>=COUNT([Task Name]:[Task Name])</td>
<td>5</td>
</tr>
<tr>
<td><strong>LEN()</strong></td>
<td>Returns the number of characters (length) in a given cell.</td>
<td>=LEN([Task Name]5)</td>
<td>6</td>
</tr>
</tbody>
</table>

**NOTE:** Formatting/currency values aren’t included.
Dates have a length of 5.
Logic Formulas

**IF():** Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

- **Syntax:** `IF(logical_test, value_if_true, value_if_false)`
- **Example:** `=IF([Due Date]1 > [Due Date]2, "Date 1 is Larger", "Date 2 is Larger")`
- **Result:** Date 2 is Larger

**ISBLANK():** Used within an IF formula to test if a cell is blank.

- **Example:** `=IF(ISBLANK([Task Name]1), "Cell is blank", "Cell isn't blank")`
- **Result:** Cell isn't blank

**ISTEXT():** used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

- **Example:** `=IF(ISTEXT([Due Date]1), "Cell is text", "Cell isn't text")`
- **Result:** Cell isn't text

**ISNUMBER():** Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

- **Example:** `=IF(ISNUMBER([Task Name]1), "Cell is a number", "Cell isn't a number")`
- **Result:** Cell isn't a number

**ISDATE():** Used in an IF formula to test if a cell contains a date.

- **Example:** `=IF(ISDATE([Due Date]1), "Cell is a date", "Cell isn't a date")`
- **Result:** Cell is a date

**ISBOOLEAN():** Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

- **Example:** `=IF(ISBOOLEAN(Done1), "Cell is a boolean", "Cell isn't a boolean")`
- **Result:** Cell is a Boolean
Logic Formulas (cont.)

**AND():** Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

- **Syntax:** `AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)`
- **Example:** `=IF(AND(Done1, Done2, Done3), "All Tasks Complete", "Tasks Incomplete")`
- **Result:** Tasks Incomplete

**NOT():** Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

- **Syntax:** `NOT(boolean_expression)`
- **Example:** `=IF(NOT(Done1), "Task A Not Complete", "Task A Complete")`
- **Result:** Task A Complete

**OR():** Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

- **Syntax:** `OR(boolean_expression1, boolean_expression2, boolean_expression3)`
- **Example:** `=IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), "Due Date 1 isn't the smallest", "Due Date 1 is the smallest")`
- **Result:** Due Date 1 is the smallest

**NESTED IF():** Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

- **Syntax:** `IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))`
- **Example:** `=IF([Task Name]1 = "Task A", "This is Task A", IF([Task Name]1 = "Task B", "This is Task B", "Neither Task A nor Task B"))`
- **Result:** This is Task A
Additional Formulas and Help

**Formula Basics** - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

**Text Formulas** - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

**Date Formulas** - smartsheet.com/formula-basics
TODAY() formula, calculating working days, creating dates, etc

**Advanced Formulas** - smartsheet.com/date-formulas
Weighted average, prorate, countif, countif s, sumif, sumif s

**Using Hierarchy in Formulas** - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

**Formula Error Messages** - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot