**XMETAL 9.0 TESTING:**

**TASKS and ACTIVITIES PERFORMED INCLUDE:**

1. Loading audio media files to media docs.
2. Board meetings audio files.
3. Pronunciation audio files.
4. Attaching files to supplementary info docs.
5. Different file formats tested.
6. Copying files between tiers and from local desktop to the DEV.
7. Copied audio files and other file types from CIAT shared drive to Bastion Host and attached to CDR documents.
8. Copied various reports (including summary QC reports) from DEV to local desktop.
9. Linking documents to summaries.
10. External links.
11. Internal summary fragment links.
12. Summary fragments.
13. Media links.
14. Board member information links.

Etc.

1. Linking documents within glossary terms.
2. Marking up documents and accepting and rejecting markups.
3. Insertion and Deletion Markup with Revision Level Markup were all successfully tested.
4. Working with new tables and updating existing tables.
5. Modified existing tables.
6. Created new tables.
7. Copied tables from Excel into XMetal.
8. Using the glossifier.
9. Used the glossifier in existing patient summaries.
10. Used the glossifier in newly created patient summaries.
11. Toggling between English and Spanish summaries.
12. Editing summary documents and many other minor tasks were also performed.
13. Creating new documents for nearly all document types.
14. DIS/DCS, Person, Organization, Summary, Summary Module, etc.
15. Running QC reports for all document types.
16. Running mailer jobs
17. Genetics Professionals mailer jobs were created.
18. Submitted mailers were reviewed and updated.
19. Summary mailers were created and printed.
20. Correspondence mailers were created and opened by copying URL in e-mail and pasting it into a Browser window on DEV.
21. Making documents publishable.
22. Selected documents of nearly all document types were made publishable for hot-fixing. But results haven’t been reviewed yet.
23. Running publish preview reports.
24. Publish preview was tested for all major documents that are published.
25. This included testing Publish Preview of very large documents (e.g., Genetics of Breast and Ovarian Cancer summary, CDR62855).
26. Stedman’s Spellchecker.
27. Stedman’s spellcheck was tested using the existing ‘old’ version files.

Please note: The current version of Stedman’s spellchecker does not support XMetal 9.0 even though the ‘older’ version we used to test worked.

1. Macros Tested.
2. Many of the XMetal macros were tested.
3. Imported CTRP documents.
4. Imported and reviewed new CTGov documents.
5. Updated mapping table.
6. Imported citations.
7. Ran summary mailer preview.
8. Edited person/org documents.
9. Edited Board member information documents, including changing links to supplementary information documents.
10. Validated a variety of document types.
11. Tested all summary management reports for Board managers.
12. Tested Board Rosters.

**NEW FEATURES TESTED:**

* 1. Server name identification in open docs.
1. Being able to see the server name you’re working in was a big help.
	1. Using the new auto-hide feature the attribute inspector and element lists
2. This is handy when you have the need to use the full screen.
3. You can also dock the attribute Inspector and element list by using the new directional arrows.
	1. Using the new results pane feature. This feature has various options including
4. Validation window
5. Spell check window

Etc.

The windows can be docked just like the attribute inspector and element list with additional selections creating tabs on the same window instead of opening new windows.

* 1. Splitting and Merging tables
1. This new feature allows us to split and merge tables automatically but I don’t see its usefulness for our current processes.
	1. Resource Manager
2. This new optional feature lets you see the icons on your desktop while still in XMetal. Its use is currently limited but may be helpful for cases where audio files are uploaded into media document and can also be used for supplementary info. documents.
	1. Tiling Horizontally and Vertically
3. This feature which makes it easy to title open XMetal windows either horizontally or vertically. This will be quite helpful particularly for translation and also for QA purposes.
	1. Themes.
4. This feature allows users to “personalize” the look and feel of XMetal. Using Alt+Shift+S you can select “Windows XP Native” or "Office XP" among other options.
	1. Full screen mode makes it possible to temporarily hide the attribute inspector, elements list and structure view windows in only one or two steps. Clicking on the full screen mode again displays all the windows that were temporarily hidden.
	2. Smaller font size

**PROBLEMS and CHALLENGES encountered during testing:**

* 1. Entering attributes requires the user to press the Enter key or to navigate to another attribute field in the inspector for the text to stay. Navigating away from the current field which contains the new text deletes the text. Alternatively, saving the document will preserve the text in the current field.
	2. Some existing Keyboard shortcut keys do not work but alternatives have been provided.
1. CDR Styles Menu Shortcut Alt + S has now been replaced with Alt+Y
	1. Table Splitting Error

Another problem had to do with using the Table Split and Table Group split features. XMetal 9.0 crashes depending on where you place the cursor in the table. For example, if you have the cursor in a footer and choose any of the table split features, XMetal crashes. It must be illegal to split a table at the footer or header level but it doesn’t look like XMetal must crash as a result. Please see screenshot below:



* 1. Some users complained about the difficulty of permanently docking the element list and attribute inspector but that was before exploring the use of the directional arrows mentioned above.
	2. Apart from a known toolbar bug in the program that occurs when opening new documents or toggling between different documents, there is also some difficulty in arranging toolbars which takes a lot practice to get used to.

**CONCLUSION**:

Generally, testing was successful and users were happy with the software. Users were particularly happy because this new version required limited to no learning curve. Most of the bugs we identified were fixed. Issues we encountered with regards to shortcuts and macros were also resolved. We did not identify any issues that were showstoppers. Additionally, we identified many new helpful optional features. However, we have not been able to review the selected documents that were hot-fixed as part of this testing on the preview site.