

Step-by-Step QMetry Implementation Guide

This implementation guide walks you through seamlessly implementing QMetry within the organization, aligning with standard QA processes for optimal efficiency.

This documentation is particularly useful for the QMetry administrators, managers and end-users.

Step 1: Organizational Planning and Preparation

As you prepare to implement QMetry in your organization, follow these steps to ensure a smooth setup.

Getting Your Team Ready for QMetry

1 Build the team and select your Admin

Build your team by picking the right people and aligning their roles. Select a QMetry administrator who understands the team's needs and can effectively manage QMetry environment.

3 Set Your Goals and Prioritize Them

Establish specific, measurable goals for your team and prioritize them to ensure focus and efficient resource allocation.

5 Test Process Blueprint

Design and document your testing processes within QMetry to ensure clarity and consistency across your team's efforts.

7 Create Your Process Overview

Summarize testing processes so all team members understand their roles clearly.

9 Train Your Administrator

Train your QMetry admin to maximize the platform's features and functionalities.

2 Define Your Organization's Vision

Articulate a clear vision for your organization that aligns with your goals and inspires your team to work towards a common purpose.

4 Develop a QMetry Rollout Plan

Develop a rollout plan for QMetry with timelines and milestones.

6 Understand QMetry Lingo

Familiarize with essential QMetry terminology to enhance communication and understanding of the platform.

8 Analyze Your Needs

Evaluate your team's needs to customize QMetry for your testing goals.

10 Sync the Team

Ensure open communication and collaboration within your team, fostering a culture of synergy and shared success as you implement QMetry.

1 Build your team and chose the right QMetry administrator

Build your team by bringing the right stakeholders on board to utilize QMetry. Users in QMetry can assume one or more roles across different projects within the application. The key roles include:

- Admin: Admin holds complete control over the entire QMetry application, with the ability to assign roles and rights to other users.
- QA Manager: The QA Manager oversees a team of testers and is responsible for managing project related tasks.
- Tester: The Tester role is focused on creating, managing and executing the testing aspects of the project.

i The admin role cannot be modified or deleted. The admin can create, update, and remove other user roles as needed.

The administrator is crucial to the successful implementation of QMetry within your organization. Key qualities to look for in an administrator include:

- Deep understanding of business processes and organizational structure
- Strong leadership skills
- User advocate
- Analytical approach

2 Define Your Organization's Vision

Understand the benefits of implementing QMetry and clarify the objectives you aim to achieve. Engage all key stakeholders in the process and establish clear communication to ensure they understand and align with the process.

3 Set your Goals and Prioritize them

Establish well-defined goals to create a structured approach for breaking down the testing process into manageable steps. Since different stakeholders have varying objectives, ensure their involvement in the planning process.

- For example:
 - Testers aim to enhance task allocation and streamline test execution.
 - QA Managers seek better visibility into testing activities and access to insightful reports.
 - Admins focus on efficiently managing and controlling processes to ensure compliance with QMetry.

4 Develop a QMetry Roll out Plan

A phased roll out strategy ensures a smooth implementation of QMetry. Start by introducing essential features that users need for their daily tasks, allowing them to get comfortable with the platform. Additional functionalities can be introduced gradually in later phases for a seamless learning experience.

For example, QMetry implementation can be structured in two phases:

- Phase 1: Core QMetry features for fundamental test management.
- Phase 2: Customizable QMetry apps for enhanced functionality.

5 Get the Blueprint for Your Test Process

For seamless implementation of QMetry test management, it is very essential to analyze your existing testing workflow.

- Identify key aspects of your organization's business processes.
- Create a visual representation of the test process.
- Define test expectations, test data, assignments, and evaluation criteria.
- Map your business processes to QMetry's workflow

6 Understand Key QMetry Terminology

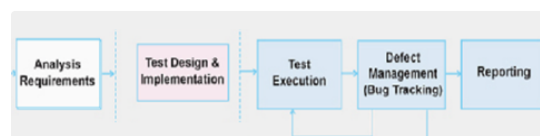
- **Requirements:** A Requirement is a documented need of what a particular product or service should be or perform. It is a statement that identifies a necessary attribute, capability, characteristic, or quality of a system in order to have value and utility to a user. Requirements show what elements and functions are necessary for the particular project.
- **Test Case:** A test case is a set of conditions or variables under which a tester will determine whether an application or software system is working correctly or not. It is a specific executable test that examines all aspects including inputs and outputs of a system and then provides a detailed description of the steps that should be taken, the results that should be achieved, and other elements that should be identified. The Test Case module allows you to create Test Cases for manual and automated tests.
- **Test Suite:** A Test Suite contains a set of the test cases that should be run together, often in a specific order. A test suite must be executed against a platform.
- **Issue:** Issue, in other terms, Defect or Bug, is logged when actual result deviates from the expected result as an outcome of testing activity.
- **Test Execution:** The Test Execution module in QMetry contains only those test suites which have at least one Release, Cycle and Platform linked with them. QA team can perform Manual Testing and schedule test for Automation Testing.
- **Project:** It is referred as the top level of scope and can be considered your central repository or library since all test assets are held within it.
- **Release:** Release is the default nomenclature for the second level of scope. The release is most often used to define requirements and test cases needed for an internal and/or external release of software and/or hardware.
- **Cycle:** It is short form of Test Cycle and is the lowest level of scope. The cycle is used for test planning and execution. The results from one cycle do not affect other cycles.
- **Build:** A build is another term used by organizations for a drop, often it refers to a combination of multiple software and/or hardware builds and/or configurations.
- **Platform:** In QMetry a "platform" is any hardware and/or software that is tested against. This could be as simple as a browser, or complex like a computer with specific "configuration" of hardware and/or software. A platform can have multiple attributes (like BIOS, browser, carrier, CPU, OS, resolution, etc.).
- **eSignature:** If the organization wants to have restricted workflow, the eSignature feature helps them regularize the Approval Workflow of test cases and test executions.

7 Create Your Process Overview

Most of the organizations follow the testing process with the following key aspects.

- Requirement Study: Define requirements or specifications in the Requirement module.
- Test Case Design and Implementation: Design test cases and assign them to develop further or to execute. Create test suites from test case itself.
- Test Case Execution: Execute test suites against Platforms that are set as environment and linked to test suites.
- Defect Management: Raise defect against the executions and retest them post closure.
- Test Closure with Report: QMetry provides various reports that sync with the latest application data and produce reports.

The goal of this step is to come up with a visual overview of your test processes. The following is an example of a testing process.



You can discuss the sample process with your product/project team and modify it to suit your organization. If you don't have a defined test process, QMetry implementation is a good time to set one up.

8 Analyze your Needs

1. Custom Fields and Integrations: Map your testing processes to QMetry by configuring custom fields to align with your workflows. Identify the ideal Requirement and Bug Tracking integration tools for seamless connectivity.
2. Reports and Insights: Leverage QMetry's system reports to gain valuable insights into test activities and results. Create custom reports tailored to your specific requirements.

9 Train your Administrator

Administrators play a key role in managing both projects and users within test projects. Refer to the following documents for a comprehensive understanding on how to manage projects and users:

- [Project Management](#)
- [User Management](#)

10 Sync the Team

Foster open communication within the team, include all stakeholders to ensure a smooth implementation of QMetry in your organization.

Final Checklist

✓ Tick off each item on the checklist to ensure a seamless implementation.

Task	Completed
Building a Team and Choosing an Admin	
Defining Organization Vision	
Setting Goals and Prioritizing them	
Deciding QMetry Rollout Plan	
Creating a Process Overview	
Analyzing your Needs	
Training for Administrator	
Syncing with the Team	


Step 2: Set Up QMetry

Once your team is ready, it's time to explore the tool. Follow below sequence of tasks to get started:

1 Project Setup

- 2 Adding users
- 3 User access and permissions
- 4 Customization
- 5 Importing data
- 6 Integration with Jira

Project Set Up

For setting a new project navigate to: Project Management  > Projects and follow the below mentioned steps:

1. Add Projects

Create a new project by entering project details and configuring project related settings.

Learn More- [Help Document on Managing Projects](#)

2. Define Release/Cycle

The create project operation auto-creates a default release and cycle in the new project. You can modify the release and cycle based on the project structure.

Learn More- [Help Document on Managing Releases/Cycles](#)

3. Define Builds

Define Builds based on your development cycle. It can be defined as product version names or iteration details.

Learn More - [Help Document on Managing Builds](#)

4. Define Platforms and Platform Attributes

Define Platforms and Platform Attributes based on your testing environment

Learn More- [Help Document on Managing Platform](#) & [Help Document on Managing Platform Attributes](#)

5. Define Labels

Define Labels that would be used to identify test assets or group them.

Learn More - [Help Document on Managing Labels](#)

Creating and Adding Users

When setting up QMetry for the first time, the super admin needs to create new users and assign them roles corresponding to their rights and responsibilities


Automatic password is generated for new users (other than LDAP/SAML users) which is then sent to their respective email address. LDAP/SAML users are automatically created after their first login into the QMetry.

Create User has 3 main steps:

- **Add User details:** It includes user details like Username, Alias, First Name, Last Name, Email, Time zone, Language Preference.
- **Select Authentication Type:**
 - **QMetry:** QMetry database is the default Authentication Type unless it is changed to LDAP/SAML. So, whenever a user logs into QMetry, the credentials are verified against QMetry database.
 - **LDAP/SAML:** LDAP/SAML users get created automatically, however in case they are created manually, admin needs to set the Authentication Type as LDAP/SAML and set it to "Active" from Integration > LDAP/SAML. Whenever a user logs into QMetry, the credentials are verified against LDAP/SAML.
- **Assign Project and Role:** Admin can assign Projects and Roles to the user that is being created.

Learn more: [Help Document on QMetry Users](#)

User Access and Permissions

There are some key components that determine a user's access to data and the operations they can perform within QMetry. You can set user's Role and Rights from Customization .

1. Understanding User Roles

QMetry includes four default roles -

- Admin - This is an Administrator role for the entire QMetry instance of the organization.
- QA Manager - QA Manager acts as Project admin.
- Tester - User with basic authoring and execution rights.
- nRead Only - Use with view only access to the QMetry instance for assigned projects.

In addition to the default roles, the super admin can also define custom roles based on the organization processes. For example - Technician, Vendor, QA Lead, Offshore QA, Business Analyst etc.

Learn More: [Help Document on User Roles](#)

2. Understanding Rights

Each role is associated with a set of rights and permissions granted to users assigned to that role.

Rights can be categorized into:

- Module Specific: Module specific rights are defined as per QMetry Modules. Actions related to the Module Specific Rights:

Create	Import
Delete	Export
Execute	Link
Copy	Versioning

- System/Project Specific: The System rights should be with Administrators and Project Specific rights should be with the QA Managers.

Role	Allow users to create/modify role
Project	Allow users to create/modify Project/Release/Cycle
Build	Allow users to create/modify builds
Platform	Allow users to create/modify Platforms & Platform Attributes
Label	Allow users to create/modify Labels
Integration	Allow users to create/modify Integrations
Automation	Allow users push automation results to QMetry
Report	Allow users to view reports.
Notification	Allow users enable/disable notifications for roles/users
Customization	Allow users to customize fields/list.
Custom Reports	Allow users to create Custom Reports

Audit Compliance	Allow users to modify Audit Settings
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Actions related to the System/Project Specific Rights

→ View

→ Modify

To view/edit rights to a role, go to: Administration >> Roles >> Edit Role

Learn More - [Help Documentation for User Rights](#)

Customization

Customization allows you to customize your QMetry's General Settings, Lists, System and Custom fields, Email Notifications and SMTP settings. Below is a quick overview of the settings you can modify under each section:

1. General Settings

- a. Page Limit: Maximum number of records displayed per page.
 - b. Login Limit: Maximum incorrect login attempts before a user is locked out of QMetry.
 - c. Reactivation after: Time after which a locked-out user gets reactivated in QMetry.
 - d. Expiry Time: Password expiry period
 - e. Manual Edit of last executed date time: Allowed/Disabled.
- This can be done in Custom Configuration >> General Settings.

Learn More - [Help Documentation for General Settings](#).

2. Execution Status: Default Execution Statuses available in QMetry are:

- a. Blocked
- b. Failed
- c. Not Run
- d. Passed
- e. Not Applicable

In addition to the above you can create your customized Execution Statuses as required in your QA Processes, for e.g. Passed with Exception, Omitted, etc.


This can be done in Customization  >> Execution Status.

Learn More - [Help Documentation for Execution Status](#)

3. Custom Fields

All the modules in QMetry have pre-defined system fields that help you to manage your default asset data. However, when your QMetry Project is mapped to the processes / workflows in your organization, you might require additional fields to be created in QMetry to add your data.

These fields are the custom or user-defined fields in QMetry. This section mainly contains the system fields and the fields you add (or have added). By Default, the System Fields are hidden. The fields shown are specific to the Project chosen.

This customization is available under Customization  >> Manage Fields.

Learn More - [Help Documentation for Manage Fields](#).

4. Lists

This section contains all the existing lists and list values available across different modules like Requirements, Test Cases, Test Suites and Issues. You can create your custom lists and their list values which you utilize in the custom fields which you create in QMetry.

This can be done under Customizations >> Lists.

Learn More - [Help Documentation for Lists](#).

5. Notifications

You can configure email notifications for users based on the roles. Default settings follow best practices, but you can customize them by selecting specific roles and users.

Module	Actions
Requirement	<ul style="list-style-type: none">• Add, Update, Delete
Test Case	<ul style="list-style-type: none">• Add, Update, Delete
Test Suite	<ul style="list-style-type: none">• Add, Update, Delete• Assign Tester from Platform View• Assign Tester from Test Execution Screen
Issue	<ul style="list-style-type: none">• Add, Update, Delete• Assign
Project	<ul style="list-style-type: none">• Update, Delete• Archive, Unarchive Project• Add Project Clone• Add, Update, Delete Release• Add, Update, Release Cycle
User	<ul style="list-style-type: none">• Deactivate, Delete
System	<ul style="list-style-type: none">• Add, Update, Delete a user role

The customization of Notifications is available under: Customization >> Notifications.

Learn More - [Help Documentation for customizing notifications.](#)

Customization Tips & Tricks

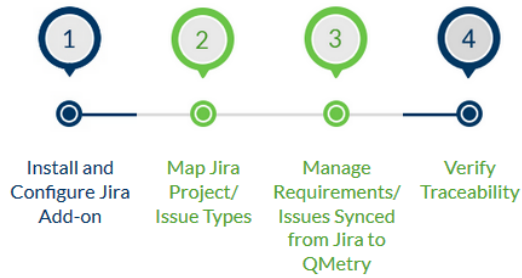
By default, QMetry includes basic and pre-defined settings as per the industry wide best practices. We recommend that users stick to the default settings available in QMetry unless there is a need to customize the Notification Settings, Fields and Lists for the best experience with QMetry Application.

Jira Integration

Jira can be configured with QMetry modules as an external system and based on it, users can perform module wise activities. If Jira is configured with QMetry, the Issues module will not be available in QMetry.

- If Jira is configured with the **Issue** module in QMetry, then users can -
 - link issue with test cases (from Execution screen)
 - create issue from test case run (from Execution screen)
- If Jira is configured with the **Requirement** module in QMetry, then users can sync Jira stories as requirements in QMetry.

Flow Chart



Resources: [Integration of QMetry with Jira](#)

Configure Jira Integration in QMetry

- Install Add on: "JIRA Integration - QMetry Enterprise"
- Configuring JIRA add-on with QMetry Admin
- Enable QMetry Test case and BDD panels for Jira Projects
- Verify the QMetry - Jira Integration is Active

Install Jira Add-on

- The Jira Integration - QMetry Enterprise add-on, which is available on Atlassian Marketplace, should be installed in your Jira Instance. Administrator login is required to be able to install the add-on.

Learn More : [Install & Configure QMetry's Jira Integration Add-On](#)

Link QMetry & Jira Project

- To set up Jira Integration - Go to Project Management > Projects.
- Open Project details by clicking the project name.
- Open the Jira Integration tab on the project detail page.
- Select Jira instance from the Jira Integration drop-down on the screen.
- Jira Project: The Jira Project drop-down lists all your Jira projects. Select a project from the list to integrate it with your current QMetry project.
- Once the Project is selected, select Jira Issue Type(s) for QMetry Modules - Requirements and Issues. The Jira issue type is a multi-select list. It is mandatory to map Issue module with at least one Jira Issue Type.
- Click on the Save & Active button to sync the issues.

Learn More: [Map Jira projects, Issue type and Fields with QMetry Project](#)

Import Data

This feature allows you to import test assets into QMetry from Excel or Jira. This feature helps you to import bulk of requirements & test cases quickly.

Import from Excel

QMetry provides Import utility to import test assets in QMetry that are stored in traditional Excel format or comma separated format (CSV).

Import from excel is available for below entities:

- Requirements
- Test Cases
- Issues

Learn More: [Help documentation for Import from Excel](#)

Sync Requirements and Issues from Jira:

QMetry supports integration of Jira. Users can sync Jira issues as requirements and issues in QMetry.

Flow of Import from Jira:

1. Configure Jira within QMetry. Explained above in Jira integration steps.
2. Map Jira projects, Issue Types and fields with QMetry project.
3. Once Jira Issue Type is mapped with QMetry modules, Jira issues are synced into Requirements and Jira Issues are available to link on Execution screen in QMetry.

Learn More: [Sync Requirements & Issues](#)

Checklist: Set Up QMetry

In this section, you learned how to define the basic QMetry settings for your company, including the company profile, the organization-wide defaults, and the role hierarchy.

Task	Completed
Project Set up	
Define User Role and Rights	
Customization	
Add Users	
Import Data	
Jira Integration	

Step 3: Engage

You've done your due diligence to follow a clear plan, set up and customized QMetry to fit your needs, and scrubbed and added/imported your data. Now it's time to focus on training your users and driving adoption.

Develop a Training Strategy

The training strategy summarizes the overall plan. It captures business objects, documents key requirements and pain points, identifies challenges, and outlines the types of training as well as the actual training delivery schedule.

By developing a training strategy, you will provide users with clear direction on what is expected and how they'll use the QMetry Application.

Right before training, you'll need to generate usernames and passwords for everyone who will attend.

- To generate usernames and passwords, admin can add users and assign them roles corresponding to their rights and responsibilities from **User Management** (Administration >> Users). Automatic password is generated for new users (other than LDAP users) which is then sent to their respective email address. New users have to provide the same username and password on their first login.

Understand Your Audience

Knowing your audience is critical to the success of training. Different kinds of users will have distinct roles and perform different tasks in QMetry, so it's important to focus your training based on their roles.

For example, you should train your management or admin team separately from your end users/testers, since they will interact with the application in different ways. This also applies to different lines of business.

Provide Relevant Content

Your users will be more engaged with the training if it's relevant to them. Be sure to incorporate scenario-based training using real data so that users walk through examples they face in their daily lives. Start with an audience analysis to make sure you develop the right materials for the right users.

Always keep in mind the burning question that your users will have: "What's in it for me?" Your curriculum should answer that question. Your materials should match the learning style of your users. The following materials are tried and-true approaches:

- Facilitator guides – Include detailed instructor notes on what to emphasize, details of timing, and so on. Be sure to map these guides to your participant guides.
- Participant guides – Provide end-to-end, detailed training documentation. Interactive, hands-on exercises are a great way to provide realistic training.
- Quick reference cards – Give users something to use when they're on the job. Use the cards during training for reference and consider publishing them online later.
- Slide shows – Use such presentations to give your users the big picture. And remember: Keep it simple!

Encourage User Adoption

The key to increasing user adoption is supporting users and being responsive to their needs, tracking usage trends over time, and actively encouraging adoption. Understanding what works and what doesn't is critical, both immediately after going live and over the long term.

Here are some key steps you can take to increase adoption:

1. Support users: Supporting users is an ongoing process. It involves getting user feedback, providing ongoing training, and identifying user champions who'll help their co-workers day to day.
2. Measure adoption: Before you can improve adoption, you have to measure it. The most common measurement of adoption is the login rate, number of test cases created, and executions carried out.
3. Encourage adoption: Create a communication plan to establish an ongoing dialogue about future training sessions, process changes, and upcoming QMetry features.

Step 4: Extend

Now that you're up and running with QMetry, you're ready for the next steps to make it a blowout success and take your test process to the next level.

Here's what to do next:

- LDAP/SAML Setting
- SMTP Setting
- Audit Configuration

LDAP/SAML Setup

1. **LDAP Setup:** QMetry supports LDAP (Lightweight Directory Access Protocol) integration to import users into application.
 - To set up LDAP go to Integration >> LDAP/SAML. The LDAP should be "Active" to define the authentication type as LDAP.
 - Assign a default role and default project for them to login. Once the integration is done users can login to QMetry and their QMetry accounts would be auto created.

Learn More: [Help Documentation for LDAP Setting](#)

2. **SAML Setup:** QMetry Supports SAML Authentication. Security Assertion Mark-up Language (SAML) is an XML-based standard for exchanging authentication and authorization data between an identity provider and a service provider. SAML is used for single sign-on to eliminate application wise passwords. QMetry Admin can integrate SAML for authentication to allow QMetry Users to login using single sign on. Currently, QMetry supports only Okta as an SAML provider.

- To set up SAML go to Integration >> SAML.
- Assign a default role and default project for them to login. Once the integration is done users can login to QMetry and their QMetry accounts would be auto created.

Learn More: [Help Documentation for SAML Setting](#)

3. **SMTP Setup:** QMetry provides a way to configure Simple Mail Transfer Protocol settings for outgoing mail transport from QMetry. Users receive email notifications e.g. test case creation, requirement creation, etc. from the account configured in SMTP Settings.

- To set up SMTP go to Customization >> SMTP Settings.

Learn More: [Help Documentation for SMTP Setting](#)

Audit Configuration

QMetry Audit Log displays events like Create, Update, and Delete of test assets. Admins can configure the number of days they require to retain information of Audit and Changelog within QMetry. They can download the logs for the days configured here.

To set up notification settings go to Customization >> General Settings & Audit >> Audit.

Learn More: [Help Documentation for Audit Configuration](#)

Resource Summary

- [Help Guide](#)
- [Quick Start](#)
- [Video Series](#)
- [Blogs](#)
- [Contact Support](#)