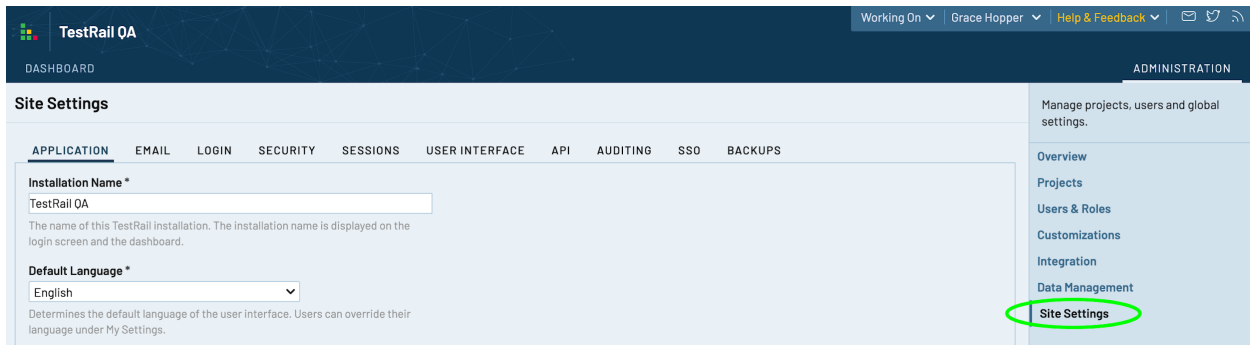# Setting up a TestRail to GAT integration

## Prerequisites

To set up the integration, you will need:

- A TestRail account
- A Global App Testing platform account

Step 1: Enable API in Site Settings

1. Log in to your TestRail account.

2. Select the "Administration" tab on the right hand side of the page, then select "Site Settings" from the menu to the right of the page.

3. On the Site Settings page, select the "API" tab. Make sure that the "Enable API" checkbox is ticked (if you are unable to see this checkbox, check with your administrator to make sure the TestRail API is enabled).
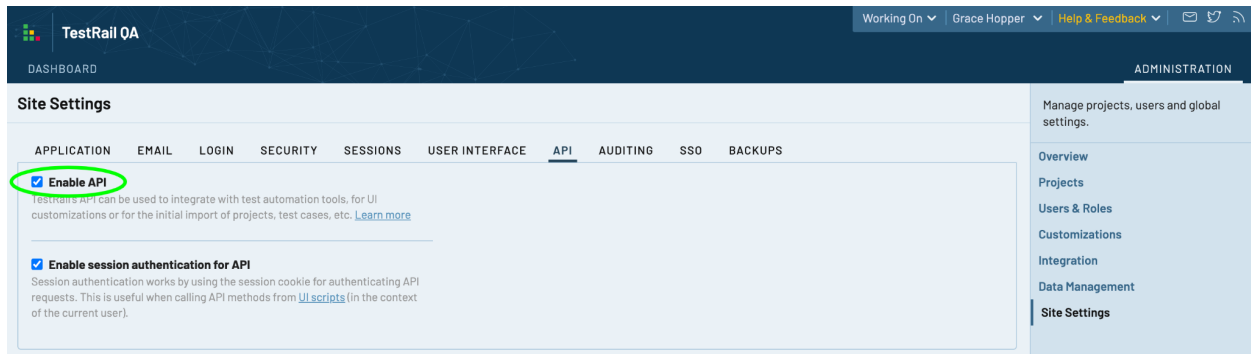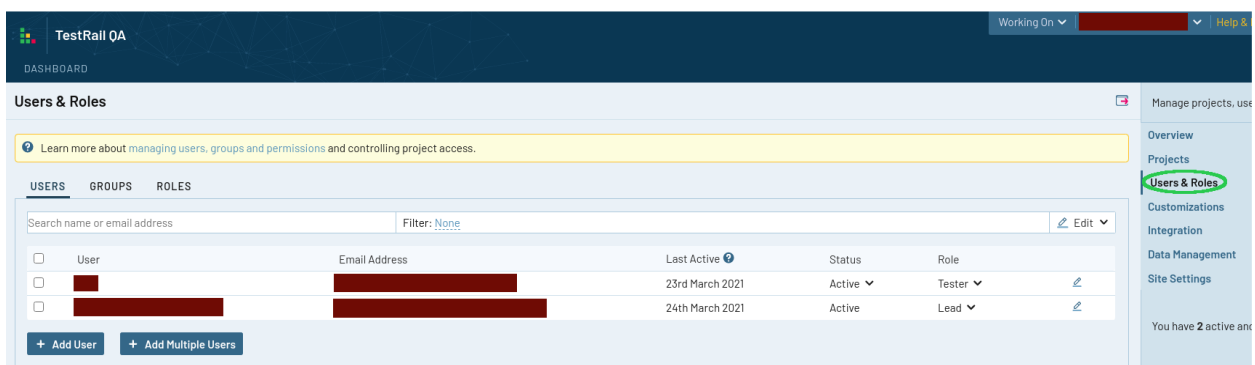
Step 2: Create a new user in TestRail (optional)

We recommend you create a new TestRail user named e.g. "GAT integration" and use it to generate your API key. The benefit of doing this is that results returned from GAT will be marked with that username, making it easy to distinguish test results provided by GAT from those executed by your internal team.

If you choose not to opt-out of creating a new user, test results returned from GAT will all be marked with whichever username was used to create the API key in step 3.
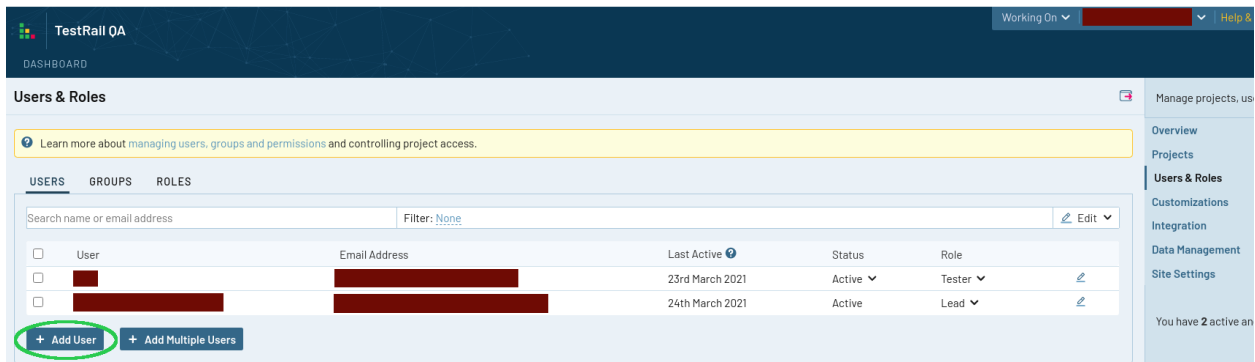
1. Select "Users & Roles" on the right hand side of the page

2. Select "Add User" at the bottom of a users list

3. Type in a full name and an email address for the user

4. Select the "ACCESS" tab and change "Role" to Tester
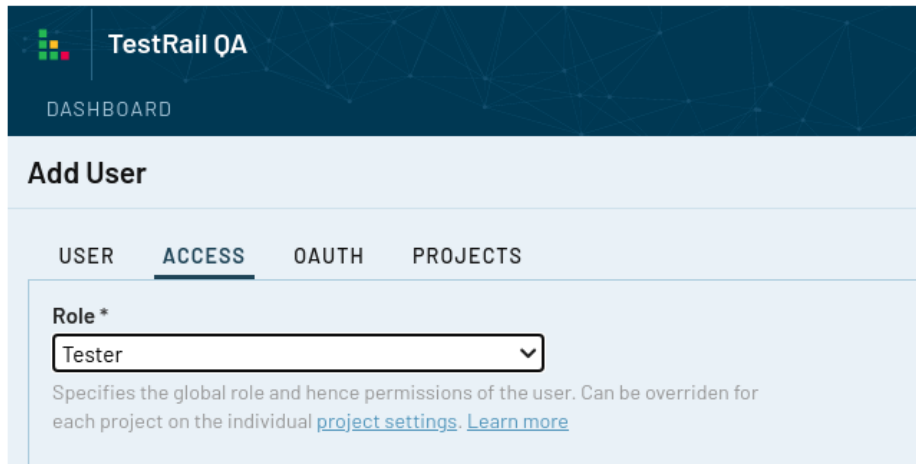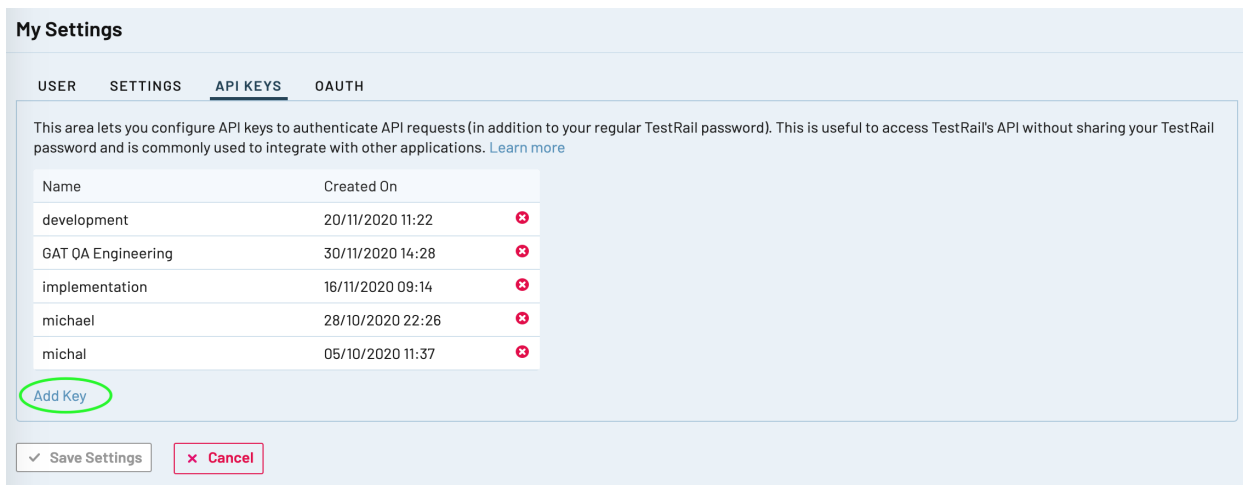

5. Click "Add User" at the bottom of the page
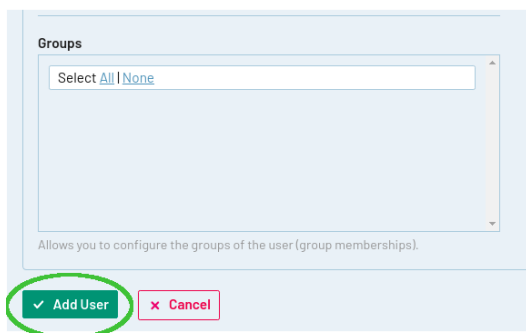
6. Log in as the user you just created

Step 3: Generate an API key in TestRail

1. On your TestRail Dashboard, click on your name/username in the top right menu and select "My Settings" from the dropdown options.

2. On the "My Settings" page, select the "API KEYS" tab and click on "Add Key" just below the table of existing API keys.

3. Type in a name for the API key (e.g. "GAT integration") and then click "Generate Key".

4. Copy the API key that has been generated and save it somewhere secure.
   Please note: you will not be able to view this API key again, so it is important to copy and save the key at this stage.

5. Select "Add Key" and make sure your key has been saved to the list of API keys (it should appear at the bottom of the list).
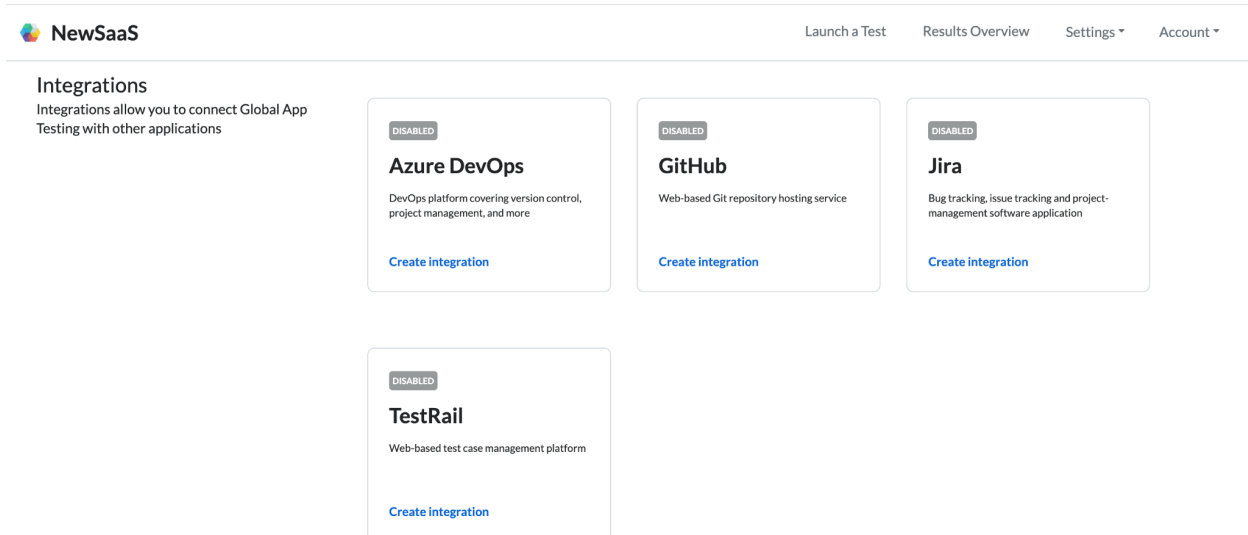

6. Select "Save Settings" to save your changes.

Step 4: Add TestRail API key to the GAT platform

1. Log in to the [GAT platform](#), click on "Settings" in the top menu and select "Integration settings" from the dropdown options.
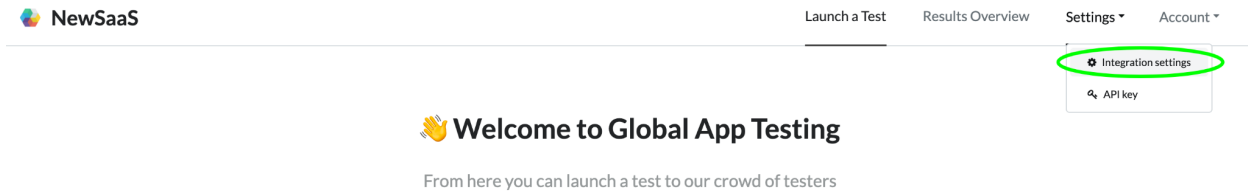
2. In the TestRail section, select "Create Integration".

3. Enter your TestRail URL and username in the relevant fields. Paste the TestRail API key you saved in Step 1 into the API key field.

4. Click "Save" and check that your integration to TestRail is now marked as "Enabled".
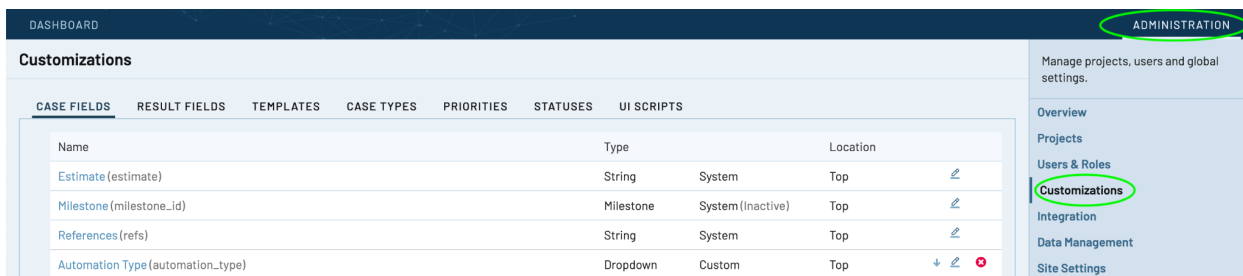
Step 5: Add the supplied UI Script to TestRail

1. Go back to your TestRail dashboard and select the "Administration" tab.

2. On the Administration page, select "Customizations" from the menu on the right.
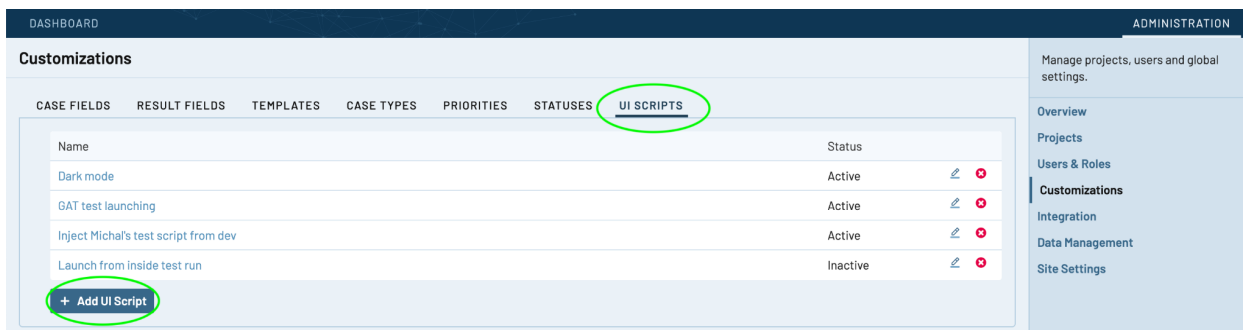

3. Select the "UI Scripts" section at the top of the page.
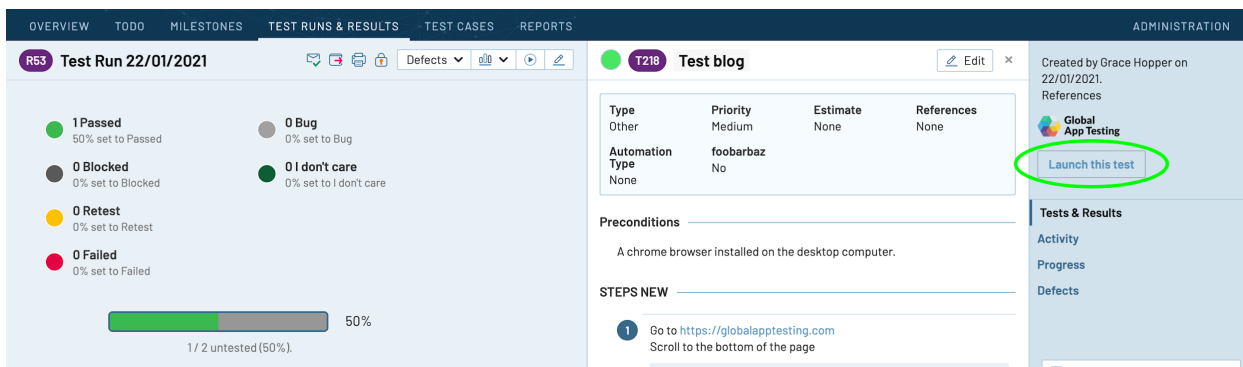
4. Select "Add UI Script" and paste the code supplied in the text file called TestRail to GAT integration - UI script.rtf into the "Configuration" field.

5. Ensure the checkbox "This UI script is active" is ticked.

6. Click on "Add UI Script" to save the UI Script.

7. Check the UI Script has been applied by going back to your dashboard and selecting any of your test runs. On the Test Run page, you should see a Global App Testing logo and a button to "Launch this test" on the right side of the page.
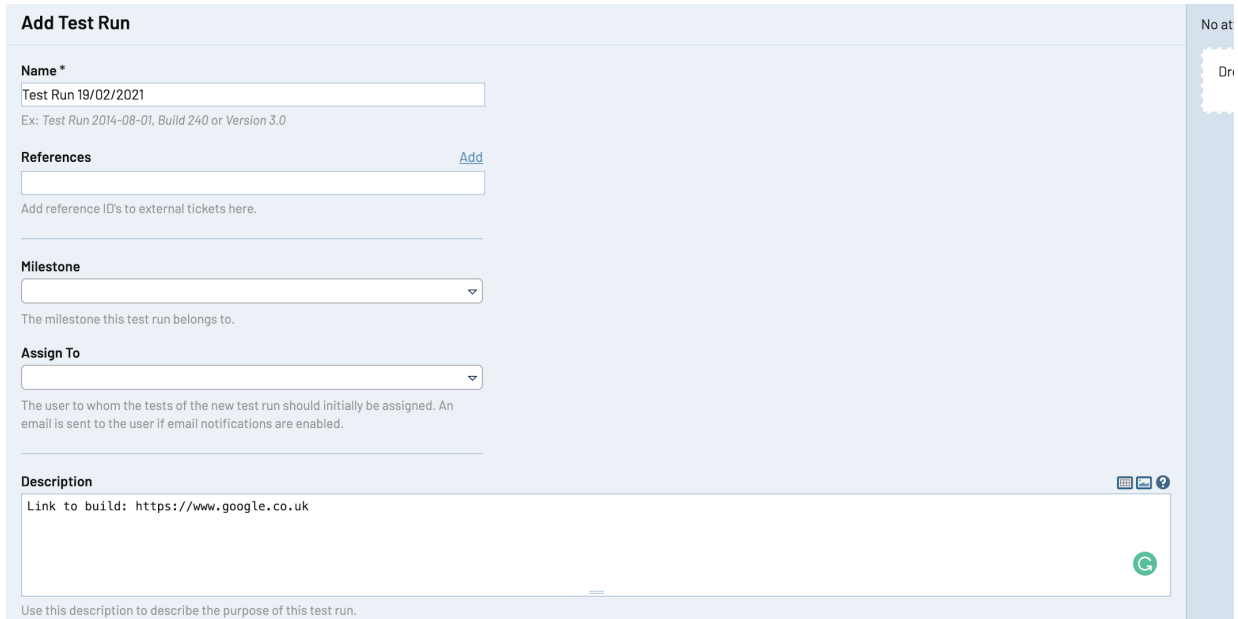
Step 6: Launch your first test from TestRail

1. When creating a test run, we recommend specifying the URL of the application/build under test in the "Description" field. Any information added to this field will be visible to testers - specifying the build URL here means the tester will easily be able to find the link and also avoids the need to place the link as an instruction in the first test case.
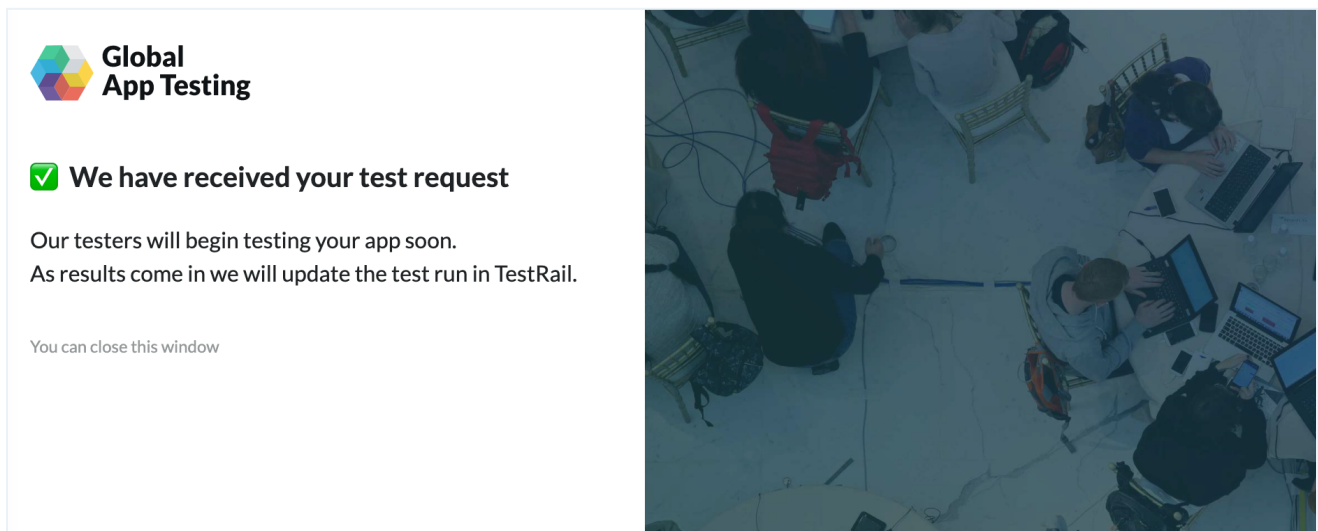
2. To launch a test, select a project from your TestRail dashboard and then select the test run which you would like to launch. From the Test Run page click the "Launch this test" button on the right of the page.

3. A new window will open and you will see confirmation that your test has been launched. If you are not already logged in to GAT's platform, you'll first be asked to log in.

4. If something went wrong (e.g. your TestRail integration was not set up or your API key expired) and you see an error message, follow the instructions in the message or contact your Customer Success Manager for help.

Step 7: Viewing reported results and issues ("bugs")

1. Once a test has been successfully launched from TestRail, you can view the status of each test case and the test case execution results within TestRail. Issues that have been reported by testers during the execution of test cases are shown separately to the test case results on a different page.

2. Test runs will be executed by multiple testers. The test case status will display as the most severe result regardless of any later results from other testers.

3. After launching a test, you will see a link appear in the Test Description section in TestRail. Click on the link "View issues found during this Test Run" to see the issues reported by testers. Alternatively, you can view the reported issues via a link directly from each test case.

4. A new window will open to show a list of all issues found by testers during this test run. From this page you can click on any issue to see more information (videos, screenshots, steps to reproduce and the actual vs expected results).

5. The issues results page is updated during the test run when the test window is open. Once the test window has closed, no further issues can be reported.

Step 8: Exporting reported issues ("bugs")

1. If you have set up an integration with a bug tracker (e.g. Jira) you can export all issues or selected issues to your bug tracker from the issue results page.

2. Select the specific issues you would like to export, or tick the top checkbox to select all issues, and click the export button at the top left of the page.

3. You will then see your export options. Select where you would like to export the issues to, or download the issues in a .csv file.
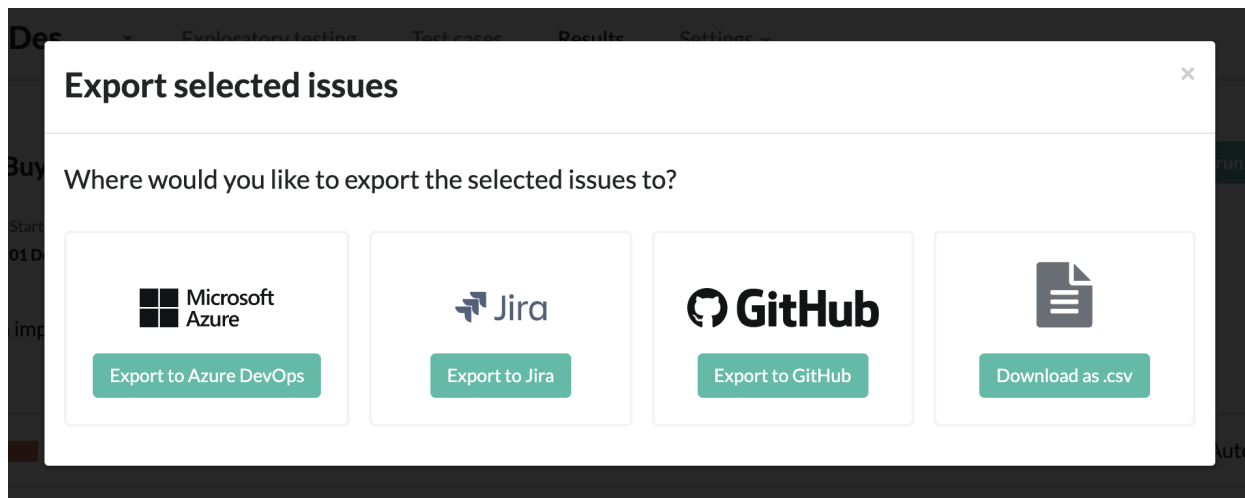
4. If you have selected an export option, you will then need to enter further information to export the issue. The information required will depend on the export option selected, but may include:

   ○ The project within your bug tracker that you would like to export the issue to
   ○ The issue/work item type, e.g. bug, task
   ○ The application component the issue relates to
   ○ A (optional) label or tags

5. Click "Export" complete the export to your bug tracker. You will see a notification at the top right of the page if the export has been completed successfully.

6. Go to the relevant project in your bug tracker to see the exported issue, which will include the issue description, steps to reproduce, any attachments etc.