

INSTALLATION GUIDE

# Setting up a TestRail to GAT integration

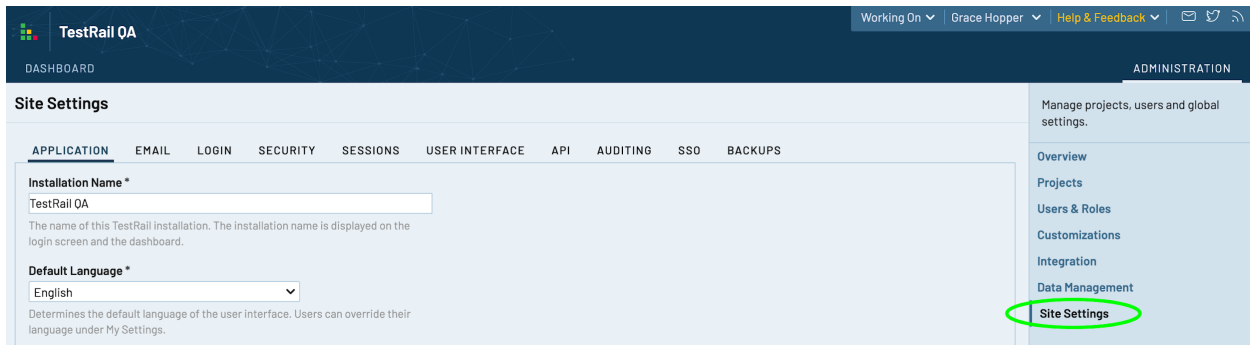
## Prerequisites

To set up the integration, you will need:

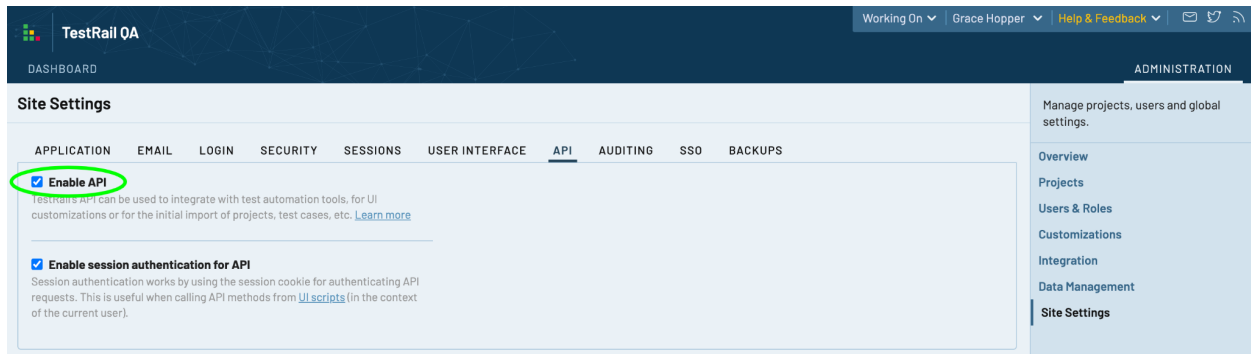
- [A TestRail account](#)
- A Global App Testing platform account

## 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).

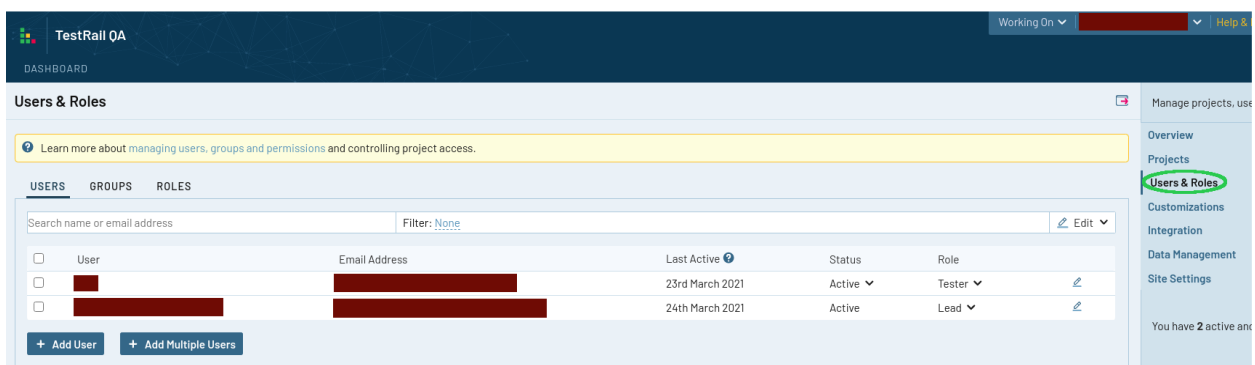


## Step 2: Create a new user in TestRail (optional)

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.

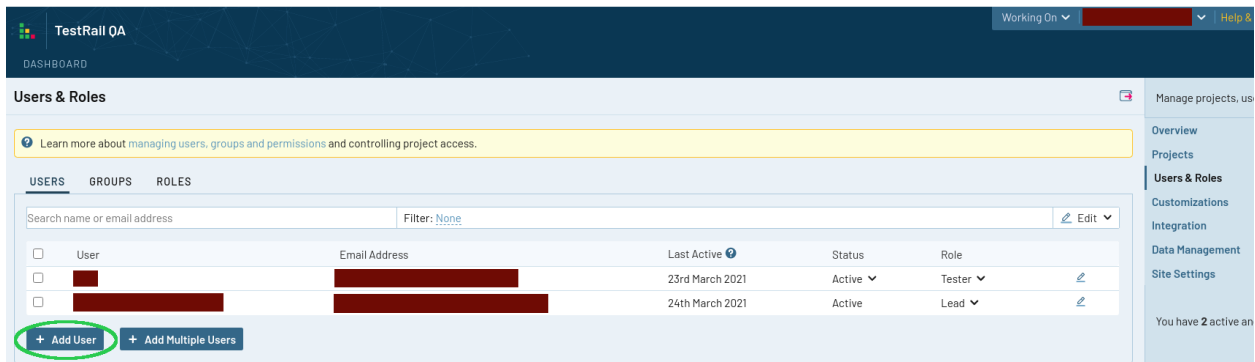
1. Select “Users & Roles” on the right hand side of the page



The screenshot shows the TestRail QA dashboard. The 'Users & Roles' section is active, and the 'Users & Roles' menu item in the right sidebar is highlighted with a green circle. The main content area shows a table of users with columns for User, Email Address, Last Active, Status, and Role. There are two buttons at the bottom: '+ Add User' and '+ Add Multiple Users'.

User	Email Address	Last Active	Status	Role
[Redacted]	[Redacted]	23rd March 2021	Active	Tester
[Redacted]	[Redacted]	24th March 2021	Active	Lead

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

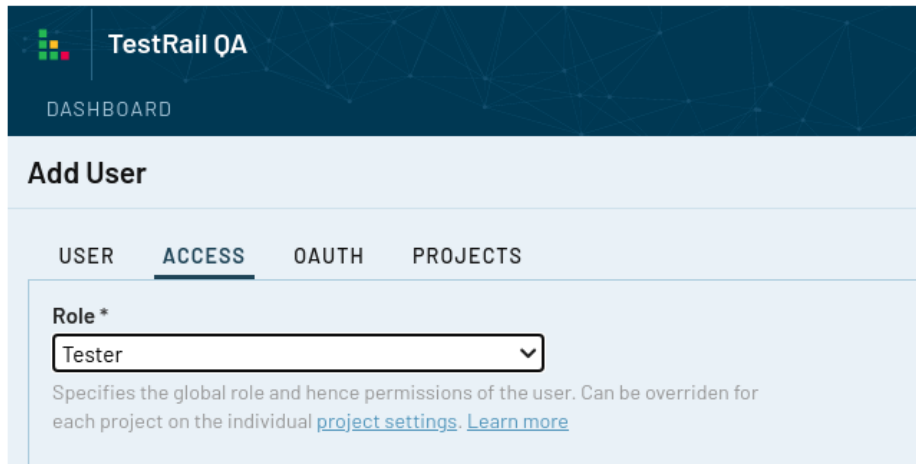


The screenshot shows the TestRail QA dashboard. The 'Users & Roles' section is active, and the '+ Add User' button at the bottom of the users list is highlighted with a green circle. The main content area shows a table of users with columns for User, Email Address, Last Active, Status, and Role. There are two buttons at the bottom: '+ Add User' and '+ Add Multiple Users'.

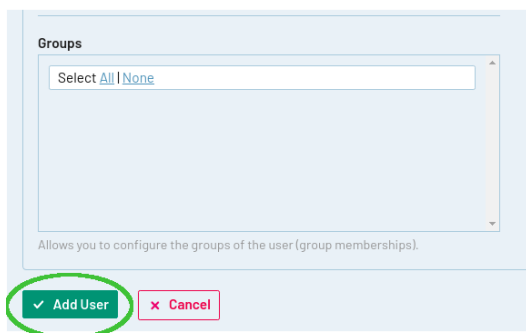
User	Email Address	Last Active	Status	Role
[Redacted]	[Redacted]	23rd March 2021	Active	Tester
[Redacted]	[Redacted]	24th March 2021	Active	Lead

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



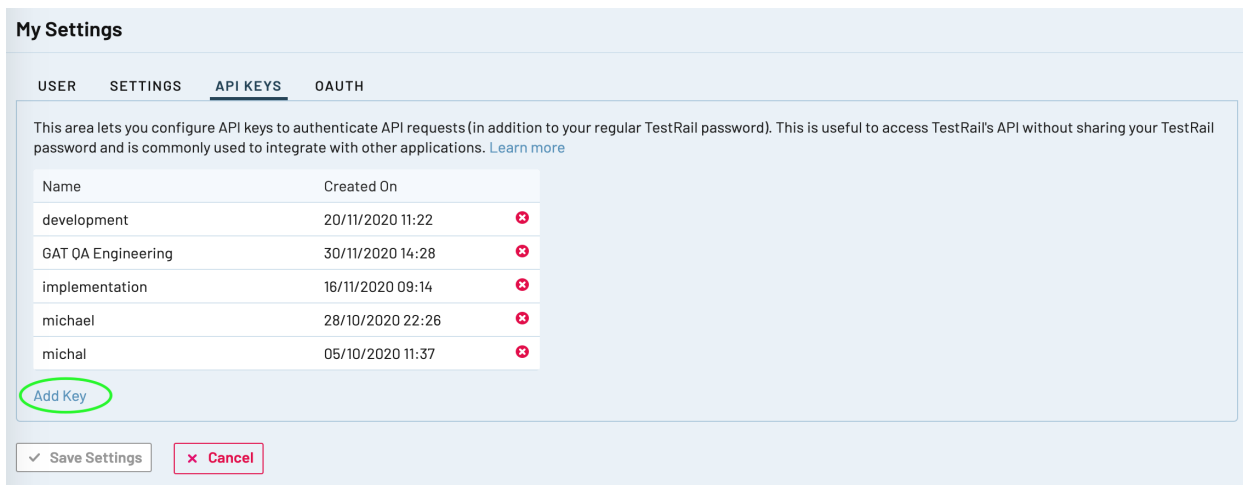
6. Log in as the user you just created

## 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).

**My Settings**

USER SETTINGS **API KEYS** OAUTH

This area lets you configure API keys to authenticate API requests (in addition to your regular TestRail password). This is useful to access TestRail's API without sharing your TestRail password and is commonly used to integrate with other applications. [Learn more](#)

Name	Created On	
development	20/11/2020 11:22	x
GAT QA Engineering	30/11/2020 14:28	x
implementation	16/11/2020 09:14	x
michael	28/10/2020 22:26	x
Michal	05/10/2020 11:37	x

Add Key

Save Settings Cancel

**Add API Key**

Name \*

test

The name of the API key should describe the usage of the key (e.g., the name of the application or tools that use the API key).

Successfully generated the following API key:

`.Ur48Pw.vT4NF/166QTn-zZJb215r1Nb.9KIbh5y2`

Please store this key in a secure location. The key is only displayed once and will no longer be accessible using TestRail's user interface.

+ Add Key x Cancel

6. Select “Save Settings” to save your changes.

**My Settings**

USER SETTINGS **API KEYS** OAUTH

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Name	Created On	
development	20/11/2020 11:22	x
GAT QA Engineering	30/11/2020 14:28	x
implementation	16/11/2020 09:14	x
michael	28/10/2020 22:26	x
Michal	05/10/2020 11:37	x
test	15/12/2020 13:47	x

Add Key

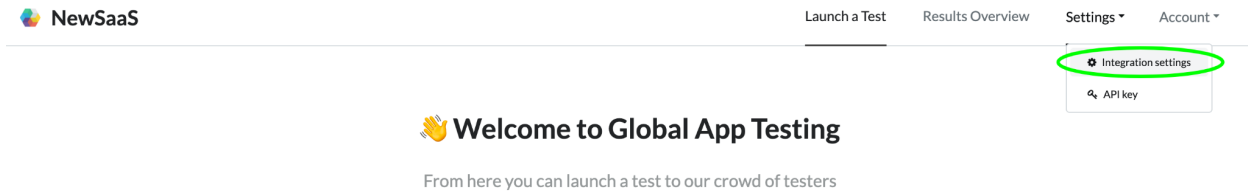
Save Settings Cancel

**My Settings**

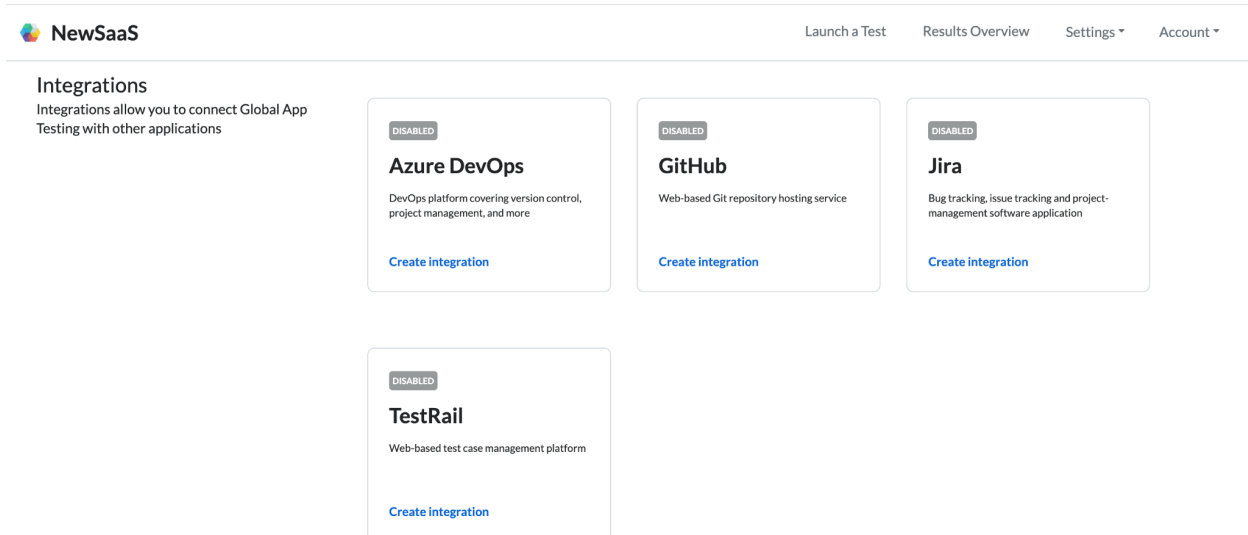
Successfully saved your settings.

## 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.

NewSaaS Launch a Test Results Overview Settings Account

### TestRail

Web-based test case management platform

#### Integration settings

What is your TestRail site URL?

#### Authentication

What is your TestRail username?

What is your TestRail API key?

[Learn how to create an API key](#)

Save Cancel

4. Click “Save” and check that your integration to TestRail is now marked as “Enabled”.

NewSaaS Launch a Test Results Overview Settings Account

### Integrations

Integrations allow you to connect Global App Testing with other applications

**DISABLED**

#### Azure DevOps

DevOps platform covering version control, project management, and more

[Create integration](#)

**DISABLED**

#### GitHub

Web-based Git repository hosting service

[Create integration](#)

**DISABLED**

#### Jira

Bug tracking, issue tracking and project-management software application

[Create integration](#)

**ENABLED**

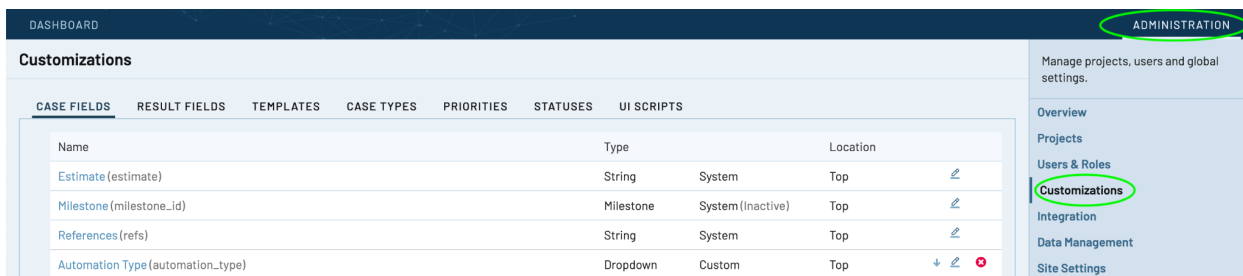
#### TestRail

Web-based test case management platform

[Edit integration](#)

## 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.

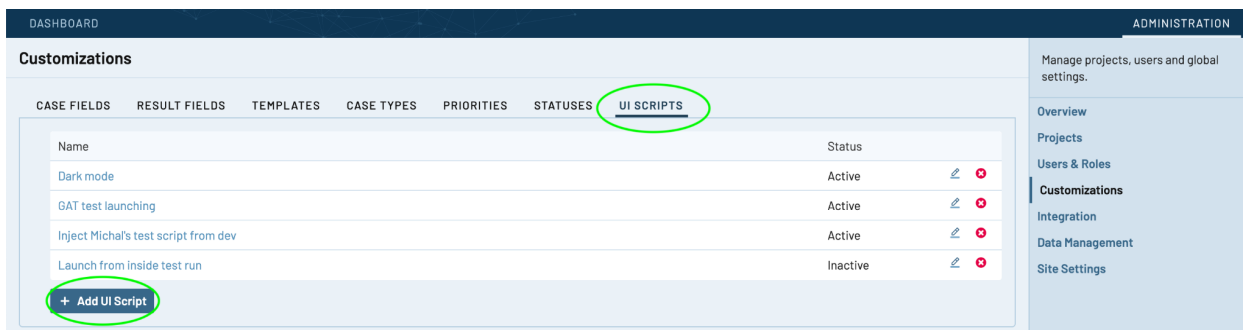


The screenshot shows the TestRail Administration page with the 'ADMINISTRATION' tab selected. The 'Customizations' section is active, and the 'UI SCRIPTS' tab is selected. A table lists existing UI scripts:

Name	Type	Location
Estimate (estimate)	String System	Top
Milestone (milestone_id)	Milestone System (Inactive)	Top
References (refs)	String System	Top
Automation Type (automation_type)	Dropdown Custom	Top

The right-hand navigation menu has 'Customizations' highlighted.

3. Select the “UI Scripts” section at the top of the page.

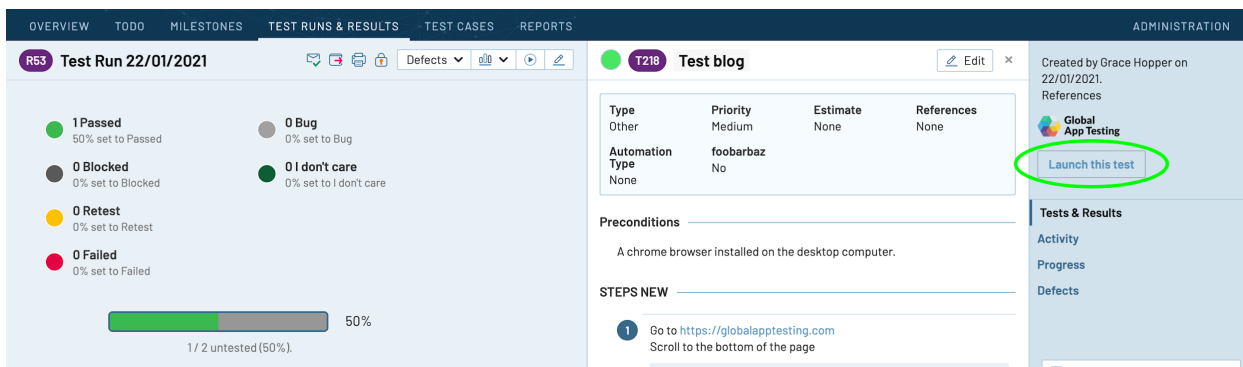


The screenshot shows the 'UI SCRIPTS' section of the Customizations page. The 'UI SCRIPTS' tab is selected and highlighted. A table lists existing UI scripts:

Name	Status
Dark mode	Active
GAT test launching	Active
Inject Michal's test script from dev	Active
Launch from inside test run	Inactive

A '+ Add UI Script' button is highlighted at the bottom left of the table.

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.



The screenshot shows a Test Run page for 'Test Run 22/01/2021'. The 'Test blog' section is visible, showing a test case with a 'Global App Testing' logo and a 'Launch this test' button highlighted. The test case details are:

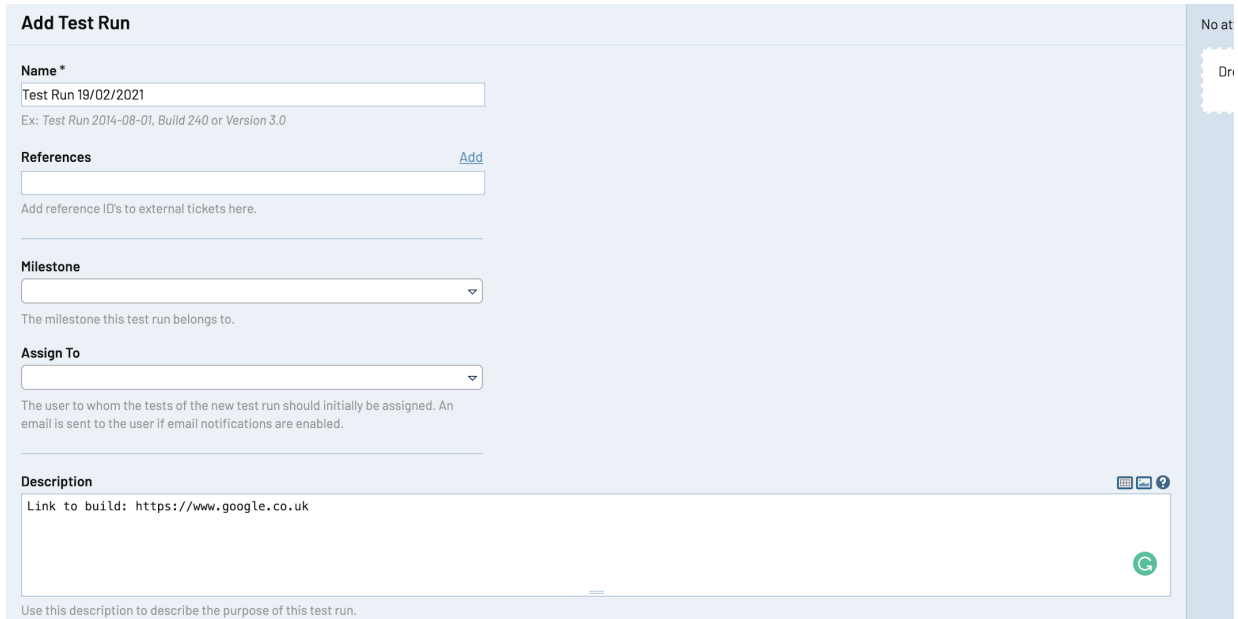
Type	Priority	Estimate	References
Other	Medium	None	None
Automation Type	foobarbaz	No	

The 'Preconditions' section contains the text: 'A chrome browser installed on the desktop computer.' The 'STEPS NEW' section contains a step: '1 Go to <https://globalapptesting.com> Scroll to the bottom 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.



**Add Test Run**

Name\*  
Test Run 19/02/2021  
Ex: Test Run 2014-08-01, Build 240 or Version 3.0

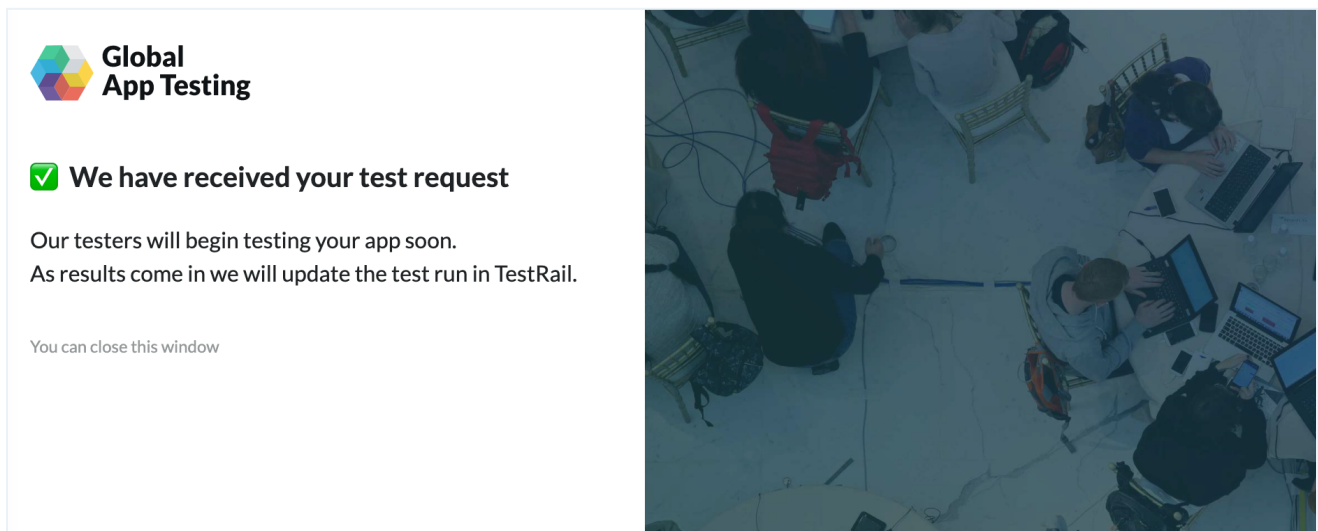
References [Add](#)  
Add reference IDs to external tickets here.

Milestone  
The milestone this test run belongs to.

Assign To  
The user to whom the tests of the new test run should initially be assigned. An email is sent to the user if email notifications are enabled.

Description  
Link to build: <https://www.google.co.uk>  
Use this description to describe the purpose of this test run.

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.



**Global App Testing**

✓ **We have received your test request**

Our testers will begin testing your app soon.  
As results come in we will update the test run in TestRail.

You can close this window

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.

The screenshot displays the TestRail interface for a test run. The top navigation bar includes 'OVERVIEW', 'TODO', 'MILESTONES', 'TEST RUNS & RESULTS', 'TEST CASES', 'REPORTS', and 'ADMINISTRATION'. The main content area is divided into two sections: 'Test Run 22/01/2021' and 'Test blog'.

**Test Run 22/01/2021 Summary:**

- 1 Passed (50% set to Passed)
- 0 Blocked (0% set to Blocked)
- 0 Retest (0% set to Retest)
- 0 Failed (0% set to Failed)
- 0 Bug (0% set to Bug)
- 0 I don't care (0% set to I don't care)

A progress bar shows 1 / 2 untested (50%). Below the bar, a link 'View issues found during this Test Run' is circled in green. The 'Test Cases' table below shows:

ID	Title	Status
T218	Test blog	Passed
T219	Test TesterWork	Untested

**Test blog Details:**

- Type: Other
- Priority: Medium
- Estimate: None
- References: None
- Automation Type: None
- foobarbaz: No

**Preconditions:** A chrome browser installed on the desktop computer.

**STEPS NEW:**

1. Go to <https://globalapptesting.com>  
Scroll to the bottom of the page  
**Expected Result:** I can see the footer
2. Click on the "Blog" link  
**Expected Result:** I can see "5 key takeaways from Elastic QA" blog post

**RESULTS & COMMENTS:** Add a comment ..

**DEFECTS:** (Empty)

**Footer:** Created by Grace Hopper on 22/01/2021. References: Global App Testing. Launch this test button.

- 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).

**NewSaaS** Launch a Test Results Overview Settings Account

### Mileage app initial exploration

14 APR Test finished FINISHED AT 5:23AM (UTC) 0 TEST CASES 3 ISSUES REPORTED

Issues Reported Test Case Results

Export Issues | 0 of 3

<input type="checkbox"/>	ISSUES	SEVERITY
<input type="checkbox"/>	On tapping Undo after speaking through Microphone key of keyboard, App Crashes	High
<input type="checkbox"/>	The same location is displayed twice in search results after entering the start location	Medium
<input type="checkbox"/>	The total dollar amount is incorrect after the user adds tolls and parking amounts	Low

- 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”)

- 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.
- 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.

**NewSaaS** Launch a Test Results Overview Settings Account

### Mileage app initial exploration

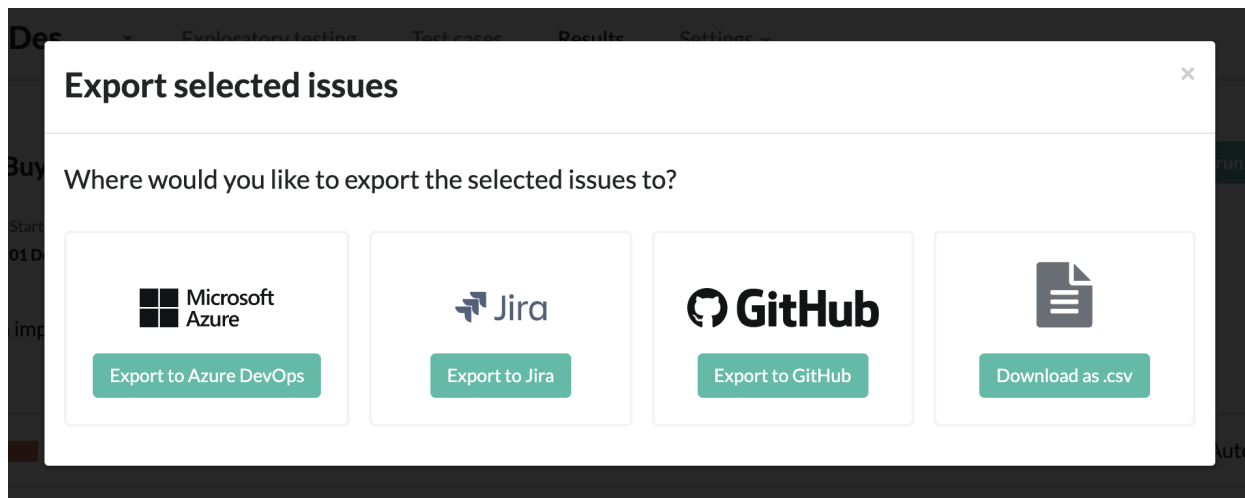
14 APR Test finished FINISHED AT 5:23AM (UTC) 0 TEST CASES 3 ISSUES REPORTED

Issues Reported Test Case Results

Export Issues | 3 of 3

<input checked="" type="checkbox"/>	ISSUES	SEVERITY
<input checked="" type="checkbox"/>	On tapping Undo after speaking through Microphone key of keyboard, App Crashes	High
<input checked="" type="checkbox"/>	The same location is displayed twice in search results after entering the start location	Medium
<input checked="" type="checkbox"/>	The total dollar amount is incorrect after the user adds tolls and parking amounts	Low

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

You are exporting 1 result to **Jira**

**Project\***  
QA - Test Export Project

**Issue Type\***  
Task

Some issue types are disabled because they require fields that are not sent while exporting. Please modify your JIRA settings if you'd like to use this issue type.

**Component**  
Flux Capacitor

**Labels (comma separated values)**  
bug, critical

You are exporting 1 result to **Azure DevOps**

**Project\***  
TEST Integration

**Work item type\***  
Bug

**Area path**  
TEST Integration

**Tags**  
atom

Cancel **Export**

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.

- 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.

The screenshot displays a bug tracker interface. On the left, a 'Backlog' section shows two issues: 'Ratings prompt functions correctly' (TEP-832) and 'Investment FAQ 2' (TEP-833). The 'Investment FAQ 2' issue is selected. The main area shows the detailed description for TEP-833. The description includes a title 'App section: Investments', a 'Bug Description' section, and two test cases. The first test case, 'Failed at step 3', describes a failure to see 'Products and services' after navigating to a specific URL. The second test case, 'Failed at step 7', describes a failure to see the expected result after clicking a 'Get started' button.

**Backlog** 2 of 832 issues visible [Clear all filters](#) [Create sprint](#) ...

TEP-832 ↑  
Ratings prompt functions correctly

TEP-833 ↑  
Investment FAQ 2

+ Create issue

TEP-833

**Description**

App section: Investments

**Bug Description:**

Failed at step 3.  
"Make sure you are on the page with title: "Investments overview""  
✗ Tester 3  
"I don't see "Products and services" after going to <https://www.google.co.uk>. It should be Products and investments"  
Screenshot

Failed at step 7.  
"Make sure you are on the page with title: "How to Apply to Invest Through Us""  
✗ Tester 2  
"Actual Result : After clicking "Get started" button. The page with the title "you're 2 stages away from becoming an investor" is displayed  
Expected Result : The page with the title "How to Apply to Invest Through Us" should be displayed after clicking "Get started" button."