opentext™

Quality of Things (QoT) for ALM and ALM Octane

Software version: 2.11

User Guide

Go to Help Center online

https://admhelp.microfocus.com/octane/

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Chapter 1: Get started with QoT

OpenText™ Quality of Things (QoT) is a manual test execution client for online and offline support working together with ALM and ALM Octane.

ALM: In online mode, you run manual tests and submit defects while connected to ALM. You can also work in offline mode when network connectivity is limited, and upload test results and defects when reconnected.

ALM Octane: In offline mode, you run manual tests and open defects in QoT. In online mode, you then upload the manual run results and defects when connected to ALM Octane.

For details, see

- "Using QoT with ALM" on page 14
- "Using QoT with ALM Octane" on page 50

The following section describes how to get started with QoT.

What's new

This release introduces the following updates:

QoT for ALM:

- **For Windows and Android only:** QoT can only access an HTTPS ALM server. An HTTP server is not supported.
- Support connection to ALM 24.1.
- **Android:**

  You can export execution plans to the `Android\data\com.microfocus.QoTPro\files` directory only.

  You can add attachments and import execution plans only from one of the following Android directory:

  - `Android\data\com.microfocus.QoTPro`
  - `Android\media\com.microfocus.QoTPro`

QoT for ALM Octane:

- Bug fixes
- Bypass the enforce run order in suite run limitation introduced in 23.4.
- Support connection to ALM Octane 16.1.200, 16.2.100, 23.4 and 24.1.

How to update to the latest version

Windows	1. Make sure to sync all your changes from QoT to ALM/ALM Octane. 2. Delete all downloaded test sets and manual runs from QoT. 3. Delete the **com.microfocus.QoT** directory: a. Click **Start** and search for **%appdata%** b. In the **Roaming** directory, delete **com.microfocus.QoT**. (If you were using QoT versions earlier than v2.0, delete **com.hpe.alm.qot.)** 4. Download and unzip the latest version of QoT.
Android (ALM only)	1. Make sure to sync all your changes from QoT to ALM. 2. Delete all downloaded test sets from QoT. 3. Delete **com.hp.alm.malmo** from the **Android/data** directory. 4. Uninstall previous version of QoT. 5. Install the latest version of QoT (Note: you may need to assign storage and autorun permissions to QoT).
iOS	1. Make sure to sync all your changes from QoT to ALM/ALM Octane. 2. Delete all downloaded test sets from QoT. 3. Uninstall previous version of QoT. 4. Install the latest version of QoT.

System requirements

The following section describes the system requirements for QoT.

ALM	• 15.0.x (Non-SSO and SSO) • 15.5.x (Non-SSO and SSO) • 16.0.x (Non-SSO and SSO) • 17.0.x (Non-SSO and SSO) • 24.1 (Non-SSO and SSO)
ALM Octane	• 16.1.200 • 16.2.100 • 23.4 • 24.1
Windows	• Microsoft Windows 7 • Microsoft Windows 8.1 (ALM only) • Microsoft Windows 10
iOS	• 14 (64 bit only) • 15 (64 bit only) • 16 (64 bit only)
Android (ALM only)	• 6.0 • 7.0 • 8.x • 9.0 • 10.0
DPI Setting	100%
Screen Resolutions (recommended)	• 1024 x 768 (minimum) • 1280 x 960 • 1366 x 1024 • 1920 x 1200

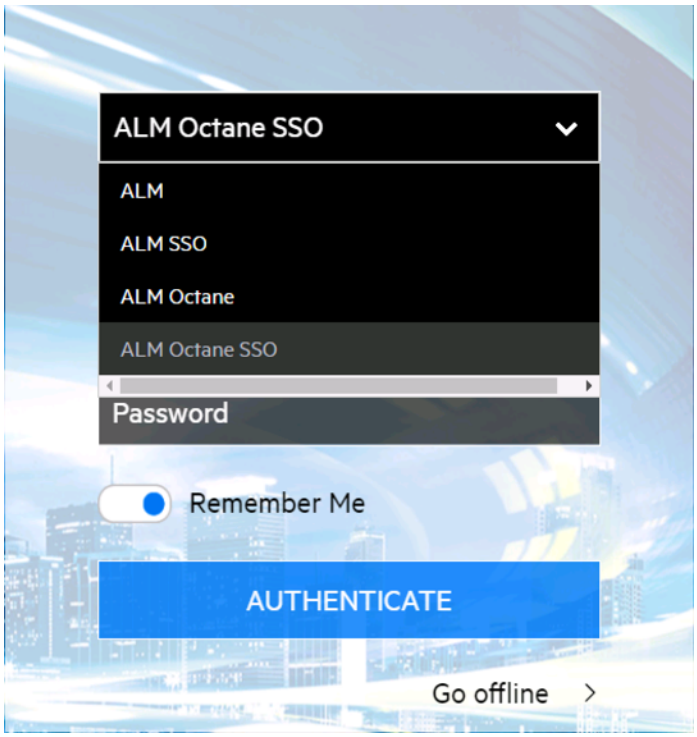
For limitations, see "Considerations for working with QoT for ALM" on page 48 or "Limitations for QoT and ALM Octane" on page 63.

Logging in to QoT

You can access QoT in either online or offline mode, depending on your network connectivity.

1. **Start QoT**

   Select . The Login window opens.

2. **Log on to QoT**

   a. From the dropdown options, select your application and login mode.

   b. Enter your ALM or ALM Octane server URL using the following syntax: `https://<your_server>:<port>`.

   For Windows and Android only: QoT cannot access an HTTP ALM or ALM Octane server.

   > **Example:** `https://my_alm_server:8080`

c. Enter your ALM or ALM Octane user name.

d. When working in online mode, enter your ALM or ALM Octane password.

When working in offline mode, enter your PIN code.

e. When working in online mode, enable **Remember Me** if you want QoT to remember your ALM or ALM Octane server URL and user name the next time you log on.

f. Select **Authenticate**. QoT verifies your user name and password and determines which domains and projects (in ALM) or spaces (in ALM Octane) you can access.

3. **For ALM**: Select your ALM domain and project name, and select **Login**.

For ALM Octane: Select your ALM Octane space (either Isolated or Shared) and your workspace, and select **Login**.

4. **Set Offline PIN**

When you first log in to QoT, the **Define Offline PIN Code** dialog box opens. Enter at least 4 characters for the PIN code. You enter this PIN instead of your password when you log on to QoT while working in offline mode.

> **Note:** Your PIN code cannot contain blank spaces.

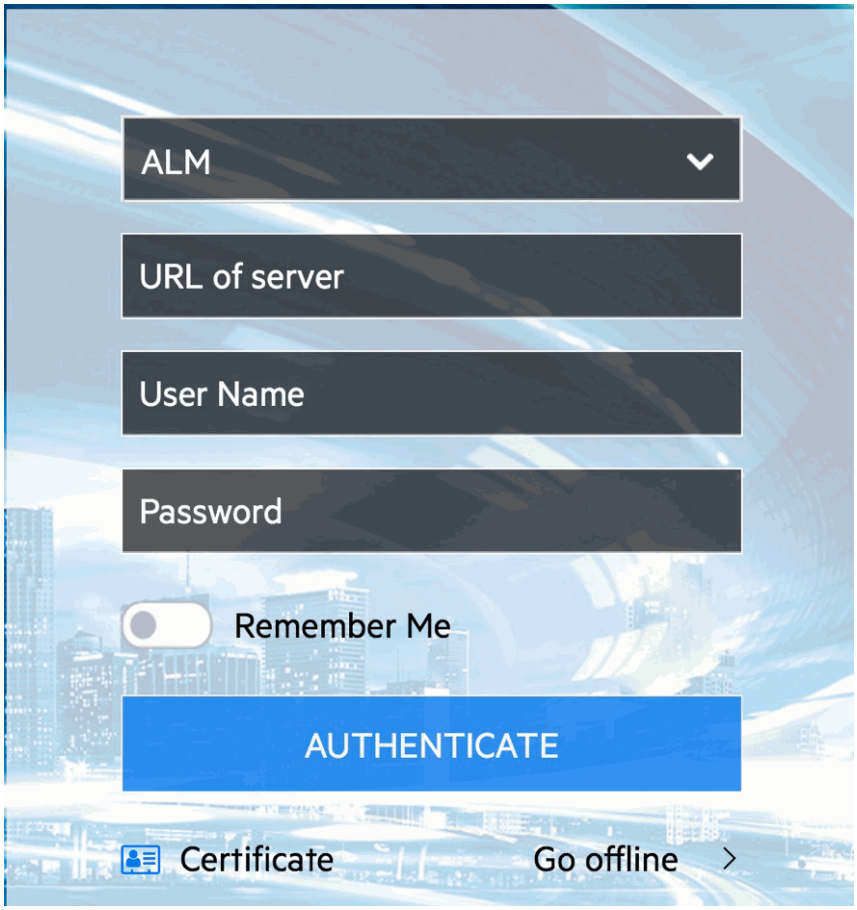
To set or update your PIN code, select the menu on the top-right corner of the screen, and select **PIN Code Settings**.

5. After logging in, proceed to "Using QoT with ALM" on page 14 or to "Using QoT with ALM Octane" on page 50, depending on your application.

Log in to QoT using client certificate

If you are using tablets of iOS systems, you can log in to QoT using client certificates. This is available for QoT with ALM only.

1. Start QoT.



2. Log on to QoT.
   a. From the dropdown options, select **ALM**.
   b. Enter your ALM server URL using the following syntax: `http(s)://<your_server>:<port>`.

      Example: `http://my_alm_server:8080`

   c. Enter your ALM user name.
   d. When working in online mode, leave the Password field empty.

      When working in offline mode, enter your PIN code.
   e. When working in online mode, enable **Remember Me** if you want QoT to remember your ALM server URL and user name the next time you log on.

f. Select **Certificate**, upload your client certificate, and select **OK** in the information dialog box.

   After you upload the client certificate, QoT will auto-fix your ALM user name if it does not match the client certificate.

g. Select **Authenticate**. QoT verifies your user name and determines which domains and projects you can access.

Managing log files

The log file contains the log activities generated while working with QoT. This is particularly useful for troubleshooting and auditing purposes.

> **Note:** When the log size reaches 5 MB, a new log file opens.

Determine log level

You can determine the severity of the events to include in the log.

To set the log level, select the menu on the top-right corner of the screen and select **QoT Settings**. Select one of the following:

Error	Logs messages for errors.
Warning (Warn)	Logs messages for warnings. This is the default logging level.
Information (Info)	Logs informational messages.

View logs

You can view log files here:

Windows	`%user%/AppData/Roaming/com.microfocus.QoT/qot_storage/logs/log_<yyyy_mm_dd_hh_mm_ss>.txt`
Android / iOS	Select the menu on the top-right corner of the screen and select **View Logs**. In the All Log Files dialog box, next to each log entry, you can: • Select **Mail** to email a log file. • Select **View** to open a log file.

Chapter 2: Using QoT with ALM

This section describes how to use QoT to run manual tests and submit defects while connected to ALM in online mode, or to work in offline mode and upload test results and defects when reconnected.

Run tests online

When running tests in online mode, the step and test statuses are automatically synchronized with ALM.

Note: Indicates that you are working in online mode. To switch from online to offline, select the icon.

In this topic:

- "Run tests" below
- "Keyboard shortcuts" on page 19

Run tests

1. **Select a test set**

   a. On the **Test Sets** tab, select a test set folder. The available test sets are displayed.

   Tip:

   - To locate a test set by ID, select **Search Test Set by ID** located in the upper-right corner of the window and enter a test set ID.
   - Select **Expand** to expand the name column of test set folders, test sets and test instances.

   b. Select a test set . The associated test instances are displayed.

2. **Start a test run**

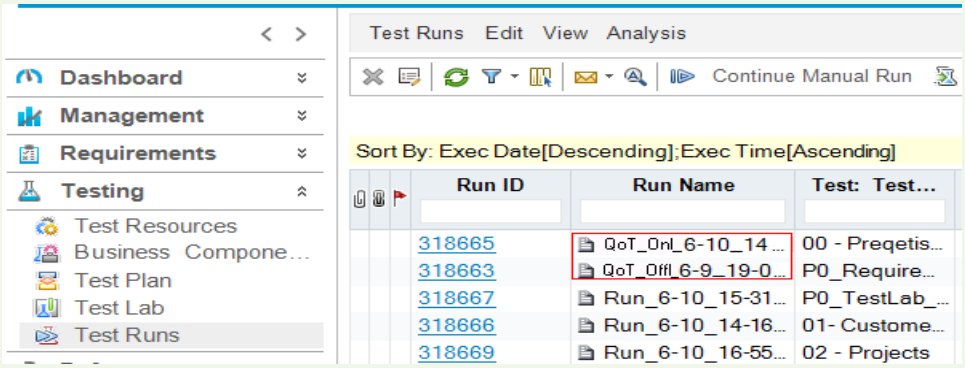
   Select a test instance and choose one of the following options:

Run. Starts a new test run.

> **Note:** If additional fields are set for running this test instance, the Set Fields for Test Instances dialog box opens. Enter the field values and select **Continue**.

Continue Run. Resumes the previous test run.

> **Note:** ALM QoT test runs displayed in the ALM Test Runs module include the following prefixes:
>
> - **QoT_Onl_** indicates an online test run.
> - **QoT_Offl_** indicates an offline test run.
>
> For example:



3. **Run the test steps**
   a. Select a run view.
   b. Select a step row.
   c. Follow the instructions detailed in the test step description.
   d. Compare the actual result with the expected result.
   e. If attachments are associated with a step, view the attachments:

Grid View	Select next to the **Status** column. The associated attachments are displayed.

Details View	The associated attachments are displayed under the **Expected Results** section.

The following attachment types are available:

	Indicates an image attachment.
	Indicates a configuration file (.config and .xml extensions) attachment.
	Indicates a text file attachment.
	Indicates an email attachment.
	Indicates a movie clip attachment.
	Indicates a file attachment.

To add an attachment to a step:

Grid View	Under **Actions**, select **Add Attachment to Step** .
Details View	On the right side of the window, select **Add Attachment to Step** .

To delete an attachment from a step:

Grid View	Select next to the **Status** column. The associated attachments are displayed. Select the icon of the attachment and then select .
Details View	Under the **Expected Results** section, select the icon of the attachment and then select .

f. Select the relevant step **status**. Options include:

Passed	The step was successful.
Failed	The step failed.
Blocked	The step cannot run. For example, you are unable to perform the step due to an environmental failure, such as network problems or hardware failure.
N/A	The current status of the step is not applicable.
Not Completed	The step was not completed.
No Run	The step has not been run.
Customized status	A user-defined step status.

Tip: In the Details View, you can also select a step status by dragging from right to left on each step listed on the left side of your screen.

g. Select the **Actual Results** text area and enter text that describes the actual step result.

h. When an expected step result and an actual step result don't match with each other, you can submit or link a defect for the step.

   To submit a defect, see "Submit a defect for a test step".

   To link a defect, see "Link to existing defects" on page 27.

i. Continue with the next steps.

4. **End a test run**

   Select the relevant option. Options include:

	Ends a test run.
	Cancels a test run.
	Ends current test run and starts running the next test listed in your test set.
	Ends current test run and starts running the previous test listed in your test set.

> **Note:** Your username and execution time will be synchronized to ALM test steps.

Keyboard shortcuts

This section lists the keyboard shortcuts available for running tests.

Ctrl-P	Sets step status to **Passed** ✔.
Ctrl-F	Sets step status to **Failed** ✘.
Ctrl-> (right arrow)	Proceeds to the next step.
Ctrl-< (left arrow)	Returns to the previous step.
Down arrow	Proceeds to the next test step.

Up arrow	Returns to the previous test step.
Enter	Opens the **Actual Results** text area (Grid View).
Esc	Closes dialog box or message box without applying any changes.

Work offline

Offline mode enables you to run tests in QoT even when you are not connected to the Internet or to an ALM server. You can upload the test results the next time you work in online mode.

Note: Indicates that you are working in offline mode. To switch from offline to online, select the button.

In this topic:

- "Prepare for offline mode" below
- "Run tests offline" on page 24
- "Upload offline defects" on page 25

Prepare for offline mode

This section describes the necessary steps for working in offline mode.

Note: You need to be in online mode to perform these steps.

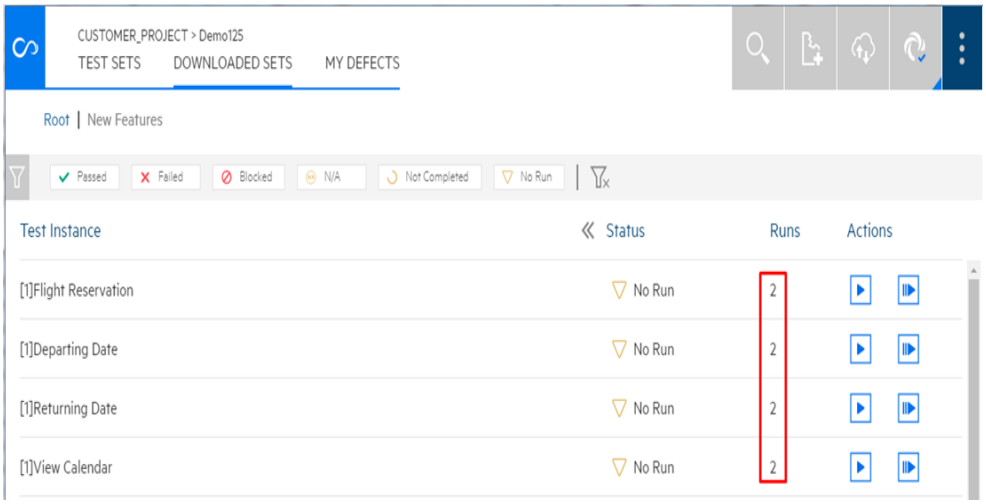
Set Offline PIN	When you first log on to QoT, you define an offline PIN Code. You enter this PIN instead of your password when you log on to QoT in offline mode. To update your PIN code, select the **QOT Menu** on the top-right corner of the screen and select **PIN Code Settings**.

Reserve Offline Runs

You can run a test offline only as many times as you have reserved in advance. Make sure that you reserve as many runs as you will need while working in online mode. By default, QoT is set to reserve 2 runs.

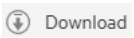
> **Note:**
>
> - The number set for reserved runs applies to all of your tests, and not to individual tests.
> - The download time may be increased due to the number of reserved runs.

To view the number of remaining offline runs, under the **Downloaded Sets** tab, select a test set to display the associated test instances. See the **Runs** column:



To modify, while working in online mode, select the **QoT Menu** on top-right corner of the screen and select **QoT Settings**. Select the number of reserved offline runs.

Download Test Sets

1. On the **Test Sets** tab, select a test set folder or a test set . Select one of the following options:
   - The download button  , or the down arrow > **Download test sets in current folder only.** Only the first level of test sets will be downloaded. Test sets nested inside the subfolders will be ignored.
   - The down arrow > **Download test sets in current and all subfolders.** Test sets of both the first level and all subfolders will be downloaded.

   Test sets that cannot be downloaded are marked with .
2. If certain fields (non-required or required) are set for running a selected test set, the Set Fields for Test Instances dialog box opens. Enter the field values and select **Continue**.
3. While downloading, the Sync in Progress dialog box opens and displays the progress.

   The sync status can be one of the following:

Status	Description
Downloading	In the process of downloading a test set.
Pending	Waiting in queue to be processed.
Canceling	In the process of being canceled.
	The process is completed with a warning.
	The process is failed.

   > **Tip:** Open the Sync in Progress dialog box by selecting the button.

4. On the **Test Sets** tab, under **Downloaded Status**, you can see the date and time when you last downloaded the test set. The downloaded test set is also listed under the **Downloaded Sets** tab.

   > **Tip:** You can also download a test set from **Search Test Set by ID** located in the upper-right corner of the

window.

Note:

- You can only download test sets, and not individual tests.
- The download time may be increased if your test set contains a large number of attachments.

Run tests offline

Run the test sets offline, and synchronize the test results the next time you work online.

1. **Log on while in offline mode**

   In the Login window, enter your PIN. For additional details, see "Logging in to QoT" on page 9.

2. **Run tests offline**

   a. On the **Downloaded Sets** tab, select a test set.

   b. Select the test you want to run.

   c. Run the test as you would in online mode (see "Run tests online" on page 15). Run results are saved locally until the next time you work online.

3. **Upload test run results to ALM**

   When working in online mode, on the **Downloaded Sets** tab, place a check mark next to each relevant test set and select

. The Sync in Progress dialog box opens and displays the progress.

   The sync status can be one of the following:

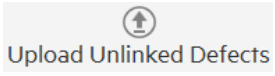
Status	Description
Uploading	In the process of uploading a test set.
Pending	Waiting in queue to be processed.

Status	Description
Canceling	In the process of being canceled.
	The process is completed with a warning.
	The process is failed.

> **Tip:** You can also open the Sync in Progress dialog box by selecting the icon.

Defects submitted during the test run (defects linked to test runs or test steps) are also uploaded to ALM.

Upload offline defects

To upload defects linked to test runs or test steps:	1. Switch to online mode. 2. On the **Downloaded Sets** tab, locate the appropriate test set. 3. Select .
To upload unlinked defects to ALM:	1. Switch to online mode. 2. On the **My Defects** tab, locate the defect. 3. Select  .

Manage defects

This section describes how to manage defects when working in ALM QoT.

> **Note:** You can customize which defect fields are displayed in ALM QoT when submitting defects. For details, see "Set defect entities for all users (administrator permissions required)" on page 35.

In this topic:

- "Submit defects" below
- "Link to existing defects" on the next page
- "Upload defects to ALM" on page 29
- "View defects" on page 30

Submit defects

You can submit defects to ALM directly from QoT. You can associate defects to ALM projects, test runs, or test steps.

1. Choose one of the following options:

Submit a defect to an ALM project	While working in QoT, you can submit a defect to your ALM project. Select the defect icon located in the upper-right corner of the window. The Add Defect dialog box opens.
Submit a defect for a test run	While running a test instance, you can add a defect to a test run. Select the menu icon located in the upper-right corner of the window. Select **Add Defect**. The Add Defect to Test Run dialog box opens.
Submit a defect for a test step	While running a test instance, if the expected result and actual result of a test step don't match with each other, you can add a defect to the step. **Grid View:** Under **Actions**, select **Add Defect to Step** . **Details View:** On the right side of the window, select **Add Defect to Step** . The Add Defect to Step dialog box opens.

2. Fill in defect details as necessary.
3. To associate an attachment with your defect, select:

	Attaches a file to your defect.
	To delete an attachment, select the icon of the attachment and then select .

4. Select **Submit**.

Link to existing defects

While running a test instance, you can link existing defects to a test run or a test run step.

To link existing defects to a test run:

1. Select the menu icon located in the upper-right corner of the window.
2. Select **Link Defect**. The Link Defect to Run dialog box opens enabling you to enter a defect number.

   If you are working in online mode, you can search for a defect and view its details before linking it to a test run.

   When working in offline mode, you cannot search for a defect or view its details.

To link existing defects to a test run step:

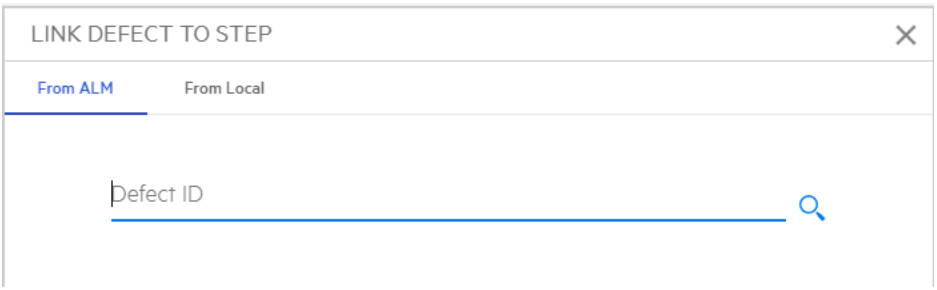
1. In Grid View, under **Actions**, select **Link Defect to Step**.

   In Details View, on the right side of the window, select **Link Defect to Step**.

2. In the Link Defect to Step dialog box, link ALM or QoT local defects to the step.

   If you are working in online mode and running a test step in the **Test Sets** tab, you can search for a defect and view its details before linking it to the test step.

   If you are working in online mode and running a test in the **Downloaded Sets** tab, you can search for an ALM defect to link in the **From ALM** tab or select a QoT local defect to link in the **From Local** tab.



   If you are working in offline mode, you can enter an ALM defect ID and link it in the **From ALM** tab or select a QoT local defect to link in the **From Local** tab.

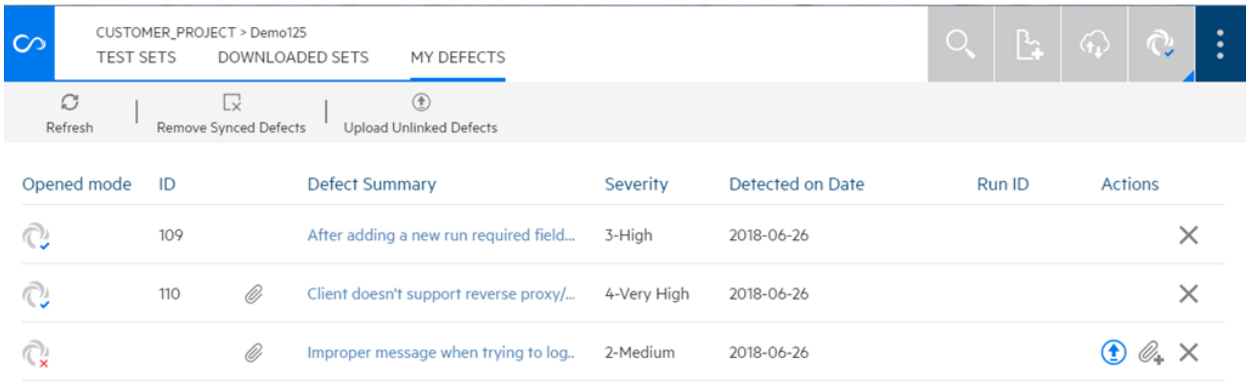
You cannot search for an ALM defect or view its details. When you upload the test result to ALM, the system will verify whether the linked ALM defect exists in ALM.

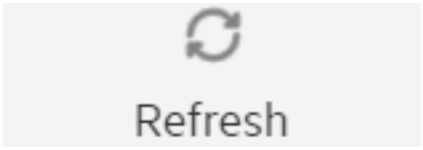
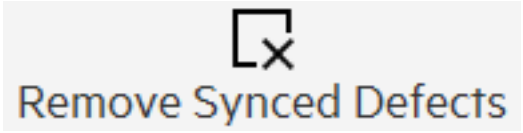
Upload defects to ALM

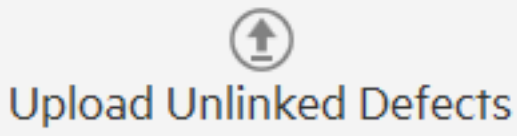
Online Mode	Defects are automatically uploaded to ALM.
Offline Mode	• If you submit defects while running test instances, then your defects will be linked to your test run results. After switching back to online mode, you need to manually upload the test runs that contain the linked defects to ALM. • If you submit offline defects that are not linked to test runs, you need to manually upload the defects to ALM after switching back to online mode. For details on offline mode, see "Work offline" on page 21.

View defects

The My Defects tab displays the defects you have submitted while working in online and offline mode.



UI Element	Description
	Refreshes the defect data in the My Defects grid so that it displays the most up-to-date information. **Note:** To view any changes made to attachments in ALM, open a defect view by selecting the defect summary.
	Removes the following defects from the My Defects grid: • Defects submitted in online mode (automatically uploaded to ALM). • Defects submitted in offline mode that were uploaded to ALM.

UI Element	Description
	Uploads all defects submitted in offline mode that are not linked to test runs.
Opened Mode	• Indicates online mode. • Indicates offline mode.
ID	A unique numeric ID for the defect, assigned automatically by ALM. The Defect ID is read-only.
Defect Summary	A brief summary of the defect.
Severity	The severity of the defect.
Detected on Date	The date on which the defect was detected.
Run ID	The test run ID.
Actions	• Uploads a defect submitted in offline mode that is not linked to a test run. • Removes the defect only from the My Defects grid. • Attaches a file to your defect.
<edit defect>	If the **Defect Summary** text is in blue, you can view the defect. Once you have uploaded the defect to ALM, you cannot edit it from ALM QoT.

Exporting and importing between clients (Windows only)

This section describes how export and import downloaded test sets and offline defects between Windows client machines.

In this topic:

- "Exporting" below
- "Importing" below

Exporting

This section describes how to export the file. The file is saved and exported in ZIP format.

1. Select the **QoT Menu** on the top-right corner of the screen and select **Export**.
2. You are prompted to create and save the file.
3. If the export has been successful, you can delete the exported test sets and defects from your local storage.

Importing

This section describes how to import the saved file to a target project.

1. Open ALM QoT on the destination client machine that you want to import the file to.
2. Select the **QoT Menu** on the top-right corner of the screen and select **Import**.

   Alternatively, the **Import** option is also available from the login window when working in offline mode.

3. When importing the file, if any of the test sets, which are going to be imported, have already been downloaded, the downloaded test sets will be overridden by this import. To continue. Select **Yes**.

   When importing from the login window while in offline mode, a PIN code is required.

   - If the user account used to export file, has already been used to access the same ALM server, enter the PIN code of this user.
   - If the user account used to export file, has not been used to access the same ALM server, use the same PIN code as the one entered in the source client machine.

4. Select the file that you want to import.

Limit access to a specific QoT version

You can control which versions of QoT users can access. An error occurs if a user attempts to log in to QoT using an incorrect version.

> **Note:** You cannot limit access to versions prior to ALM QoT 1.5.

1. On your ALM server machine, in the **<ALM deployment path>\ALM\webapps\qcbin** directory, create the **qot-allowed-versions.jsp** file.
2. Open the file and add the following:

```
<Root>
 <MinVersion>ALM QoT version number</MinVersion>
 <MaxVersion>ALM QoT version number</MaxVersion>
</Root>
```

   where `MinVersion` enables you to use the specified ALM QoT version or a later version.

   where `MaxVersion` enables you to use the specified ALM QoT version or an earlier version.

   In the following example, you can use ALM QoT 1.5 or later:

> **Example:**
>
> ```
> <Root>
>
>  <MinVersion>1.5</MinVersion>
>
> </Root>
> ```

Set defect entities for all users (administrator permissions required)

After customizing the defect fields of your project in Project Customization within ALM, you can set which defect fields are displayed in ALM QoT when submitting defects.

> **Note:** The settings apply to all users in the currently selected project , irrespectively of the user device.

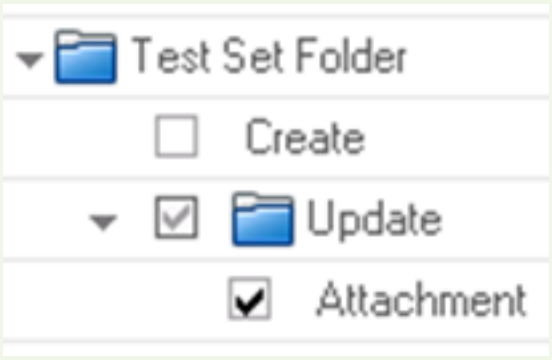
1. **Prerequisite: Customize your project entities through ALM**

   Open ALM. In the Project Customization window, in the left pane, click **Project Entities**. Customize the defect entities. For details, see ALM Help Center.

2. **Configure defect fields in QoT**

   a. Select the **QoT Menu** ⋮ on the top-right corner of the screen and select **Project Settings > Defect (sets all users)**.

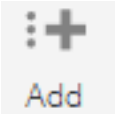
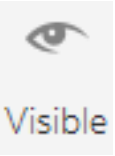
   > **Note:** This option is available to users assigned to the `TDAdmin` or `QoTAdmin` user group.
   >
   > `TDAdmin` is a system-defined group in ALM. `QoTAdmin` is a user-defined group.
   >
   > Using ALM Project Customization, you can create the `QoTAdmin` group and assign users to it. Note that the only required permission for this group is to have the ability to update attachments in test set folders.



For more details on creating user groups and assigning permissions, see ALM Help Center.

b. Set the defect fields.

UI Element	Description
Save	Saves the changes made in Defect Configuration.
Restore	Rolls back to the last saved state.
Up Down	Moves the selected field up or down in the order.
Visible	Enables you to set which defect fields a user can see and which should be hidden. **Note:** Certain critical fields cannot be hidden.
Remove	Removes a select field.

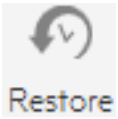
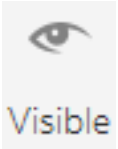
UI Element	Description
	Opens the Add Fields for Selection pane, enabling you add defect fields.
Field Name	The field name.
Visible	Indicates whether the field is visible.
Required	Indicates whether the field is required.
Default Value	Indicates the default value of the field.
Assigned List	Indicates whether the field is assigned to a list.
	Lists hidden fields. To move a field from the Not Visible pane, select it and then select **Visible**  .

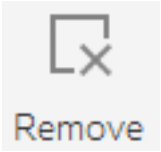
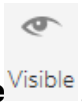
Set defect or run entities for the current user

You can set which fields to display when submitting defects or when running test instances from ALM QoT. You can also define which fields are required.

> **Note:** The settings apply to the currently logged in user and to the device in use.

1. **Open the configuration window.**
   - **Defects:** Select the **QoT Menu** on the top-right corner of the screen and select **Project Settings > Defect (sets current user)**.
   - **Runs:** Select the **QoT Menu** on the top-right corner of the screen and select **Project Settings > Run (sets current user).**
2. **Configure the fields**

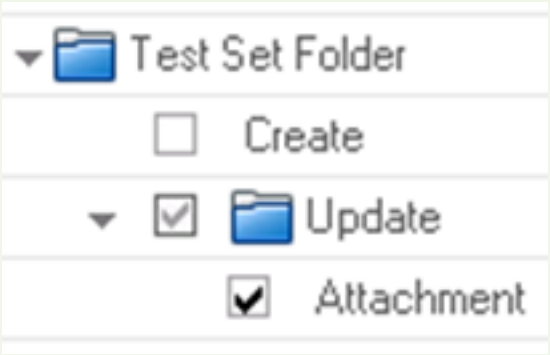
UI Element	Description
	Saves your configuration changes.
	Rolls back to the last saved state.
	Moves the selected field up or down in the order.
	Enables you to set which fields a user can see and which should be hidden. **Note:** Certain critical fields cannot be hidden.

UI Element	Description
	Removes a select field.
	Opens the Add Fields for Selection pane, enabling you add fields.
Field Name	The field name.
Visible	Indicates whether the field is visible.
Required	Indicates whether the field is required.
Default Value	Indicates the default value of the field. **Note:** Setting new values will overwrite the values set through the **Project Settings > Defect (sets all users)** option. For more details, see "Set defect entities for all users (administrator permissions required)" on page 35.
Assigned List	Indicates whether the field is assigned to a list.
	Lists hidden fields. To move a field from the Not Visible pane, select it and then select **Visible**  .

Set rules for all users (administrator permissions required)

QoT rules controls which actions can be done under certain conditions. The rules, once activated, apply to all users in the currently selected projects, irrespectively of the user device.

1. Select the **QoT Menu** on the top-right corner of the screen and select **Project Settings > Rule (sets all users)**.

> **Note:** This option is available to users assigned to the `TDAdmin` or `QoTAdmin` user group.
>
> `TDAdmin` is a system-defined group in ALM. `QoTAdmin` is a user-defined group.
>
> Using ALM Project Customization, you can create the `QoTAdmin` group and assign users to it. Note that the only required permission for this group is to have the ability to update attachments in test set folders.
>
> 
>
>
> For more details on creating user groups and assigning permissions, see ALM Help Center.

2. Configure the rules.

Column	Description
Rule Details	What the rule controls. If a rule requires rule conditions, specify the conditions. Click **+** to add additional conditions and **-** to remove a condition. **Note:** For the **Test instances can be run and downloaded only when ...** rule, the test instance or test fields available for selection are the single-value verified lookup list fields.

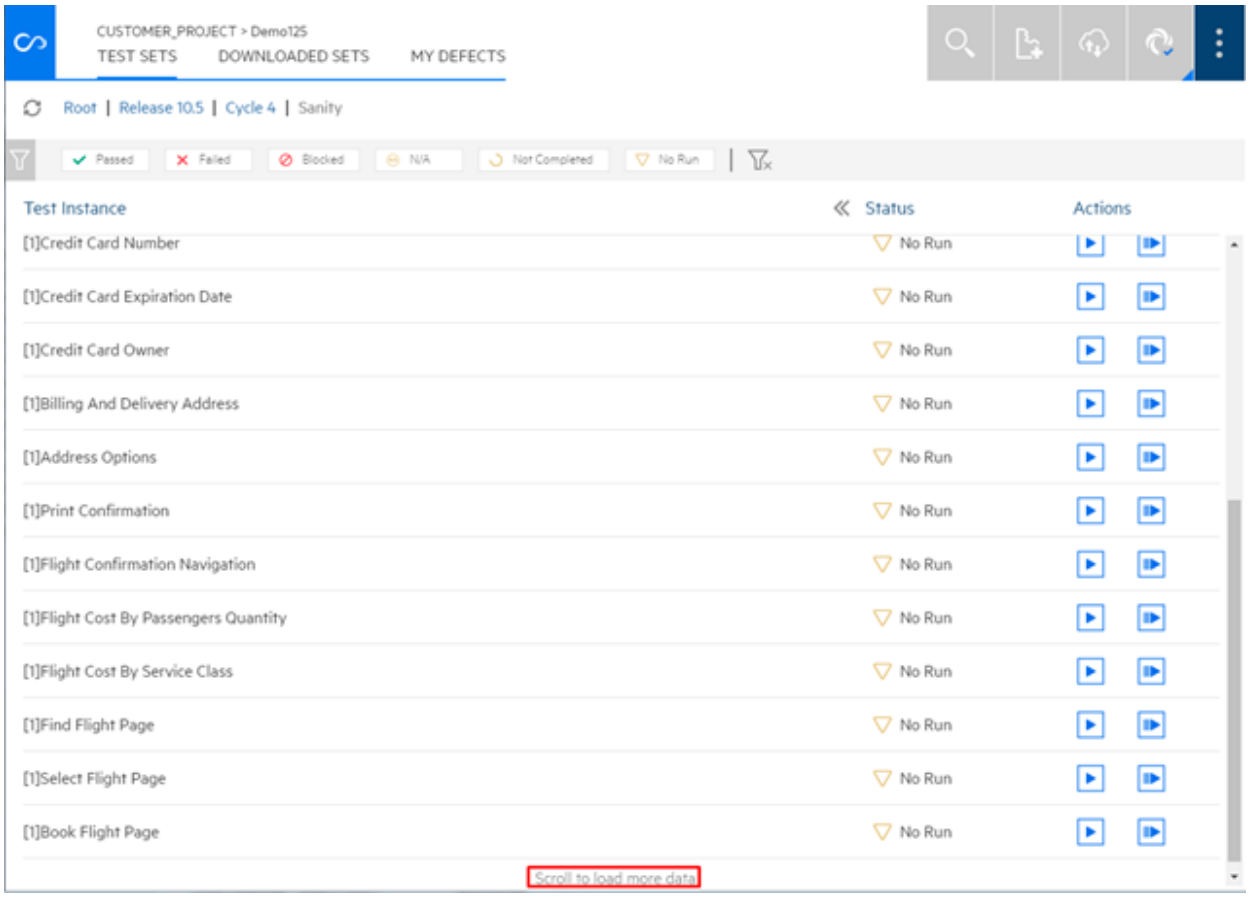
Active	Activate or deactivate the rule.
Description	Detailed description of the rule.

3. Click **Save** to save the settings, or **Restore** to cancel the changes.

Set number of entities per view

You can set the number of entities displayed at once on your screen. For example, when searching for test set folders, you can limit on how many folders are shown at a time. Reducing the number of entities displayed at once can significantly speed up the time it takes to display the entities. By default, QoT displays 20 entities per view.

To load the next set of entities on your screen, scroll down.



To set the number of entries per view, select the menu ⋮ on the top-right corner of the screen and select **QoT Settings**. Select the number of entities on a page.

Run cross-project execution plans (ALM Edition)

If you are working with QoT on Windows and use ALM Edition, QoT enables you to create local test execution plans from multiple domains and projects, and to run their test instances.

In this topic:

- "Create and execute an execution plan" below
- "Refresh test statuses" on page 45
- "Export and import an execution plan" on page 46
- "Rename or delete execution plans" on page 46

Create and execute an execution plan

The following steps describe how to create an execution plan, and run its test instances.

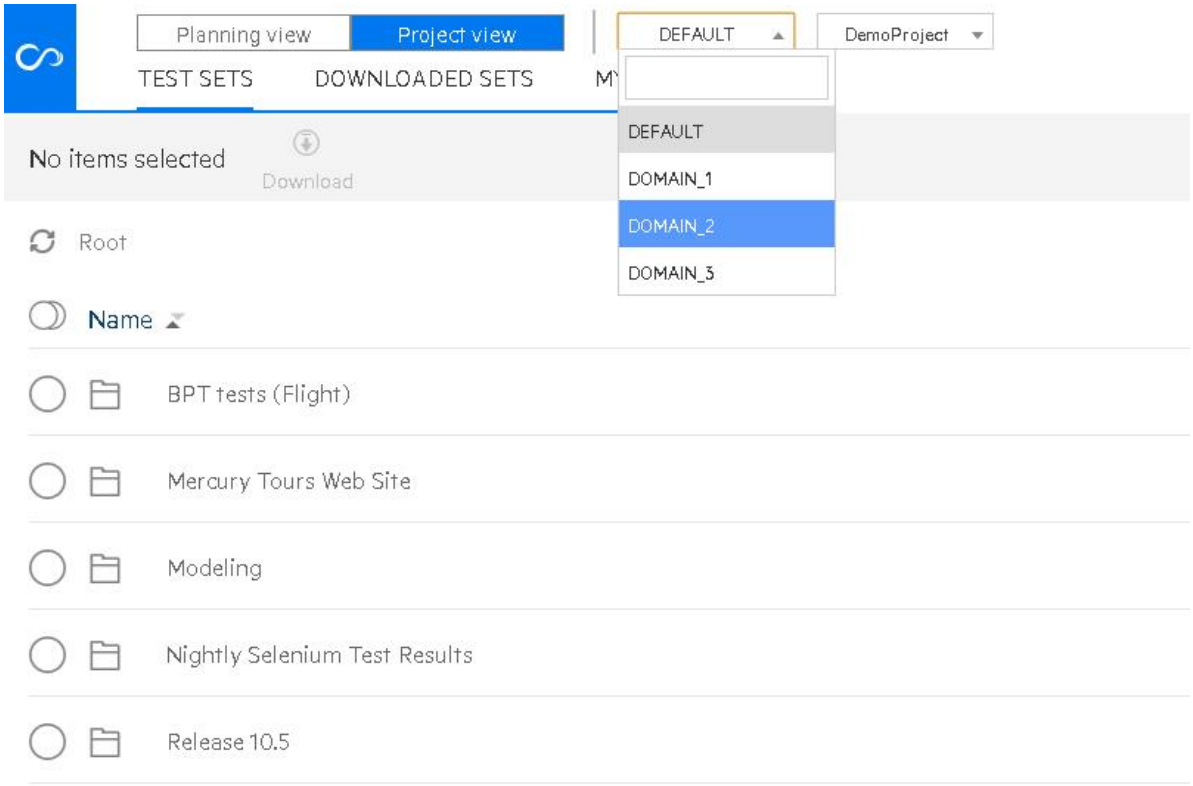
Step 1: Create an execution plan

1. Open the **Planning view** window. This is where you create and execute plans.
2. Click **Add Execution Plan**

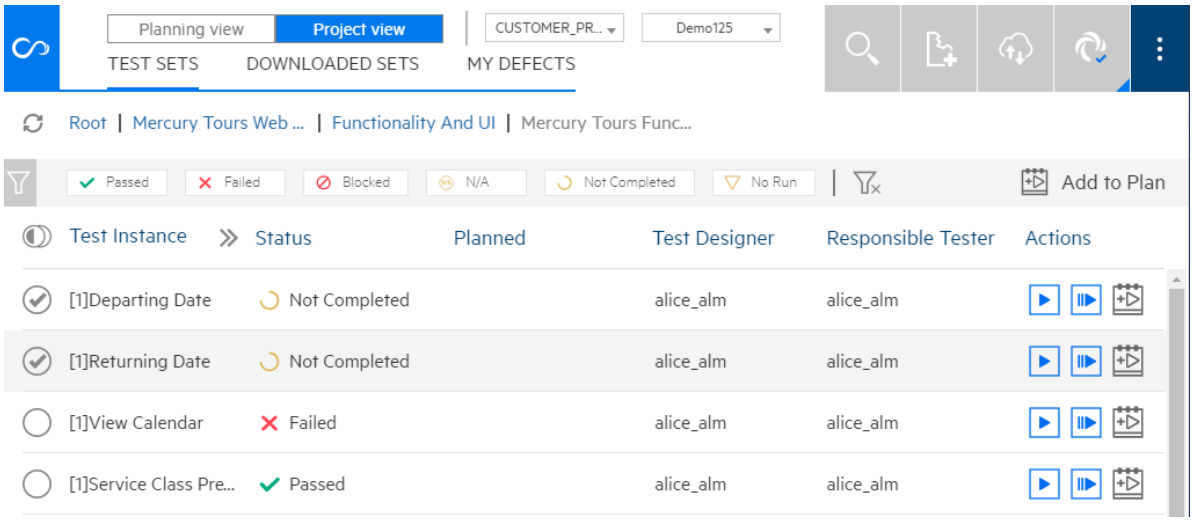
.
3. Name the execution plan and click **Add**.

Step 2: Add test instances to the execution plan

1. Open the **Project view** window. This is where test sets and their test instances are displayed.
2. From the dropdown lists next to the Project View button, select a **domain** and **project**.



3. On the **Test Sets** tab, select a test set.
4. Drill down and select one or more test instances, and click **Add to Plan** .



5. From the list of execution plans, select the plan where you want the test instances added.

6. (Optional) Choose a different domain or project, and add other test instances to the execution plan as needed.

Step 3: Run the test instances in online mode

You can execute tests in online mode only.

1. Open the **Planning view** window.
2. Open the plan you want to execute.
3. Run each test instance, as described in "Run tests online" on page 15.

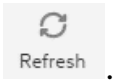
   When you run tests, continue runs, or open defects in the Planning view, you will only see the required ALM run fields and defect fields.

   > **Note:** In the **Planning view** you can add a defect to a test run using the manual runner menu ☰, but you cannot link an existing defect to a test run.

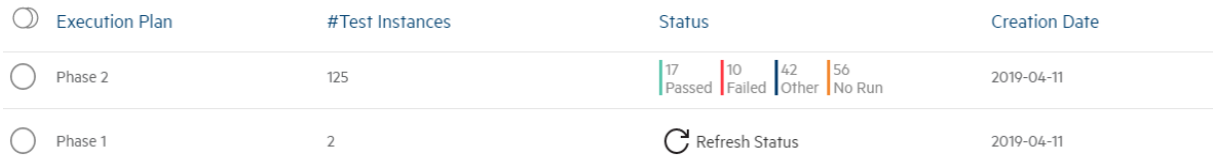
4. After you run tests, you can see a summary of test statuses in the **Planning view > Status** column.

Refresh test statuses

There are two ways to refresh test statuses:

- To refresh the data of all of your execution plans, click the **Refresh** button in the upper right corner 

. Note that if your execution plans include multiple domains and projects, this may take a lot of time to complete.
- To refresh a single execution plan's statuses, click **Refresh Status** in the plan's **Status** column.

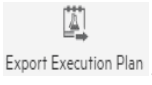


If you have drilled into an execution plan, you will see its latest status when you navigate from the instance grid to the execution plan grid. When you log off and log in again, you see the **Refresh Status** button on all the execution plans.

Export and import an execution plan

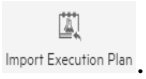
After you create an execution plan you can export it. You can also import plans sent to you.

For example, a manager might create a few execution plans and export them to testers. Each tester would then import the plans they need to execute, and run their tests.

- To export an execution plan, select it from the Planning view and click **Export execution plan** 

. The plan is exported as a zip file.

> **Android:** An execution plan can be exported to the following directory only:
>
> `Android\data\com.microfocus.QoTPro\files`

- To import an execution plan, open the Planning view and click **Import execution plan** 

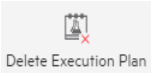
.

> **Note:** You can only export or import one execution plan at a time.
>
> You cannot have two execution plans with the same name. If you intend to export an plan and then re-import it, rename it before exporting it as described below.

Rename or delete execution plans

- To rename an execution plan, select it from the Planning view and click **Rename execution plan**

.

- To delete an execution plan, select it from the Planning view and click **Delete execution plan** 

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Considerations for working with QoT for ALM

This section lists the known issues and things to consider when working with QoT for ALM.

Subject	Consideration

Defects	• **Assigned Lists:**
	  • Unable to change the assigned list in Defect Configuration if it is set to verify a value (ALM Project Customization).
	• **Subject field:** This field is not available in Defect Configuration.
	• **Environment field:** This field is not available for defects.
	• **User-defined fields:**
	  • The user-defined field index cannot be defined past `BG_USER_100`.
	  • When using a template project, the user-defined field index cannot be defined past `BG_USER_50.`

Runs	**Environment field:** This field is not available for runs.
Security	• It is strongly recommended that you use appropriate security measures such as encryption to protect your data. • It is strongly recommended to restrict application access to predefined domains in accordance with your organization's policy. For additional details, see https://cordova.apache.org/docs/en/latest/guide/appdev/whitelist/.
Server Authentication	When logging in to ALM QoT and the Web server or the proxy server authentication fails, close and restart your ALM QoT session.
Storage and Backup	When backing up and storing sensitive data, ensure that it is stored in a secured location with restricted access permissions in accordance with your organization's policy.

Subject	Consideration

Testing	• **Test run initialization:** The test run initialization and the end process may take more time if your test contains a large number of steps and attachments.
	• **Images / attachments:** Unable to open images or attachments from the Description or the Expected Results field.
	• **Test parameters:** When working test parameters, the parameter values must be defined in ALM.
	• **Canceling test runs:** To cancel test runs, you need Delete Run permission for your selected ALM project.
	• **Test steps:**
	  • Required fields are not supported in test steps.
	  • Unable to run a test instance without test steps.

Attachments	• The maximum size of an attachment file is limited to 100 MB. • **Android:** You can add attachments only from the `Android\data\com.microfocus.QoTPro` or `Android\media\com.microfocus.QoTPro` directory. • **Windows/Android:** Attachment names cannot contain non-English characters or the pound (#) sign. • **iOS:** Attachment names cannot contain non-English characters, spaces, or the pound (#) sign.
ALM Extensions	Extension fields which are hidden in ALM will also be hidden in ALM QoT.
Cross-Project Execution	When naming an execution plan, the following special characters are not supported: " ' ^ * < > / | : ? , \
Update to Latest Version	See "How to update to the latest version" on page 7.
Windows	• You can only launch one ALM QoT session at a time. • To open the ALM QoT Help, make sure to install a PDF viewer.

Chapter 3: Using QoT with ALM Octane

This section describes how to run manual tests and open defects in QoT, when you are in offline mode. You then upload the manual run results and defects, when connected to ALM Octane in online mode.

For details on working with ALM Octane, see the ALM Octane Help Center.

Execute manual runs offline and upload results to ALM Octane

Use the following procedure to download planned manual test runs or suite runs from ALM Octane, and run them offline in QoT. When you are done, upload the run results online to ALM Octane.

> **Note:** You can customize which run fields are displayed in QoT when downloading from ALM Octane. For details, see "Set defect or run entities for all users (administrator permissions required)" on page 58 and "Set defect or run entities for the current user" on page 61.

In this topic:

- "Download and run planned runs offline" below
- "Upload run results to ALM Octane" on page 53

Download and run planned runs offline

1. In ALM Octane, plan one or more manual test suite runs or manual test runs, and assign them to the user that QoT uses to log into ALM Octane. When you open QoT, the **My Planned Runs** tab shows the planned runs that are in this user's **My Work** area in ALM Octane.

   > **Note:** QoT does not support manual runs created from Gherkin tests, and child manual runs created from Gherkin tests in a test suite.

2. In online mode, open the QoT **My Planned Runs** tab. Select one or more suite runs or manual runs, and then select **Download**.

   The downloaded runs now appear in the **Downloaded Runs** tab.

   If you select a suite run, you must download the entire suite.

3. (Optional) You can use the filter options at the top of the **My Planned Runs** tab to filter the list of runs that are displayed according to release, sprint, and environment.

4. To execute runs, select to change to offline mode.

> **Tip:** When you first log on to QoT, you define an offline PIN Code. You enter this PIN instead of your password when you log on to QoT in offline mode.
>
> To update your PIN code, select the **QoT Menu** on the top-right corner of the screen and select **PIN Code Settings**.

5. In the **Downloaded Runs** tab, select a downloaded run and choose to start running your test. You can run a full suite, or each child run separately.
6. Follow the instructions detailed in the run, and select a status for the run, or for each validation step. You can select a status using the following options, depending on your run type:
   - Dropdown in the manual runner.
   - Status buttons on the bottom of the screen
   - Swiping from right to left on each step on the left side of the screen.
7. To view run details in the manual runner, click the **Run details** button .
8. Until you upload, you can select the **Revert** button to restore original values, and restore a run to Planned status.

> **Note:** Original entity values can either be those downloaded from ALM Octane, or set in the Entity Settings > Run configuration options.

9. You can click **Large View** to switch from the regular manual runner to the large UI view. Here you can swipe from step to step, and perform the same manual runner actions described above.

   QoT will open to the same type of view (standard or large UI) that you used when you closed the application.

Upload run results to ALM Octane

1. When you are ready to upload your run results to ALM Octane, select to change to online mode.
2. In the **Downloaded Runs** tab, select a downloaded run, and then select **Upload**.
   - The uploaded run results now appear in the ALM Octane **Tests** tab.
   - In **My Work**, the runs that were executed and passed or failed in QoT are no longer displayed.
   - The uploaded run will stay in the **Downloaded Runs** tab until you remove it.
3. To remove a test run, select it in the **Downloaded Runs** tab and then select . This removes it from QoT but not from ALM Octane.
4. (Optional) You can use the filter options at the top of the **Downloaded Runs** tab to filter the list of runs that are displayed according to status, release, sprint, environment, and upload state.

> **Tip:** You can run a test multiple times and upload the results each time. For example, suppose you have a large suite with 100 manual runs, and each day you need to execute 10 of them (one after another). You can keep the suite in your Downloaded Runs tab, and upload the execution results daily.
>
> Alternatively, if you want to re-run the same run (overriding the previous run's results), you can keep the suite in your Downloaded Runs tab, and upload each run's results when they are ready.

Manage defects

This section describes how to manage defects when working with ALM Octane.

> **Note:** You can customize which defect fields are displayed in QoT when submitting defects. For details, see "Set defect or run entities for all users (administrator permissions required)" on page 58 and "Set defect or run entities for the current user" on page 61.

In this topic:

- "Submit defects" below
- "Upload defects to ALM Octane" on the next page
- "View defects" on page 56

Submit defects

You can submit defects to ALM Octane directly from QoT. You can associate defects to the ALM Octane workspace, manual runs, or run steps.

1. Choose one of the following options:

Submit a defect to an ALM Octane workspace	While working in QoT, you can submit a defect to your ALM Octane workspace. Select the defect icon located in the upper-right corner of the window. The Add Defect dialog box opens.
Submit a defect for a manual run	While running a manual run, you can add a defect to the run. Select the menu icon located in the upper-right corner of the window. Select **Add Defect**. The Add Defect to Test Run dialog box opens.
Submit a defect for a run step	While running a manual run step, you can add a defect to the step. **Grid View:** Under **Actions**, select **Add Defect to Step** . **Details View:** On the right side of the window, select **Add Defect to Step** . The Add Defect to Step dialog box opens.

2. Fill in defect details as necessary.
3. Select **Submit**.

Upload defects to ALM Octane

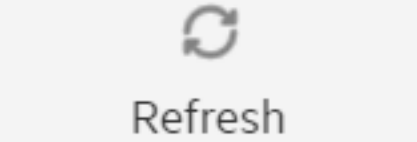
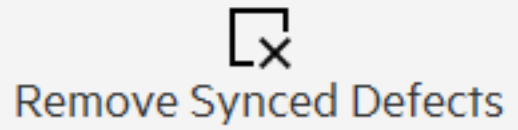
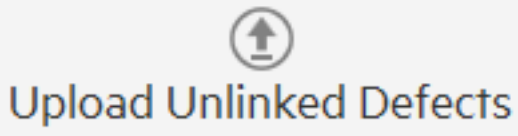
If you submit defects while running a manual run, your defects will be linked to your run results. After switching back to online mode, you need to manually upload the test runs that contain the linked defects to ALM Octane.

If you submit offline defects that are not linked to test runs, you need to manually upload the defects to ALM Octane after switching back to online mode.

For details on offline mode, see "Work offline" on page 21.

View defects

The Defects tab displays the defects you submitted while working in offline mode.

UI Element	Description
	Refreshes the defect data in the Defects grid so that it displays the most up-to-date information. **Note:** To view any changes made to attachments in ALM Octane, open a defect view by selecting the defect summary.
	Removes defects submitted in offline mode that were uploaded to ALM Octane.
	Uploads all defects submitted in offline mode that are not linked to test runs.
ID	A unique numeric ID for the defect, assigned automatically by ALM Octane. The ID is read-only.
Name	A brief summary of the defect.
Severity	The severity of the defect.
Detected on Date	The date on which the defect was detected.
Run ID	The test run ID.

UI Element	Description
Actions	• Uploads a defect submitted in offline mode that is not linked to a test run. • Removes the defect only from the Defects grid.
<edit defect>	If the **Defect Summary** text is in blue, you can view the defect. Once you have uploaded the defect to ALM Octane, you cannot edit it from QoT.

Set defect or run entities for all users (administrator permissions required)

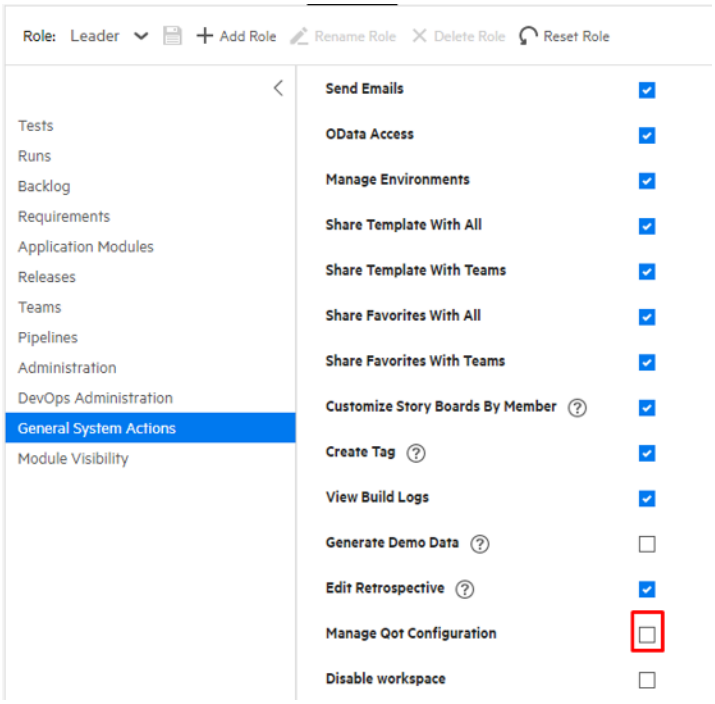
The ALM Octane administrator adds permissions to a role in ALM Octane Settings for the relevant workspace. The corresponding admin in QoT can then set which defect fields are displayed in QoT when submitting defects, or which fields are displayed when downloading manual runs.

> **Note:** This feature is only supported if you are using ALM Octane CP 11 and later.

1. **Prerequisite: Add permissions to a role in ALM Octane**

   Open ALM Octane. In **Settings > Permissions > General System Actions**, the ALM Octane administrator must enable **Manage QoT configuration** for a role in the relevant workspace. For details, search for Roles in the ALM Octane Help Center.

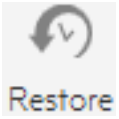
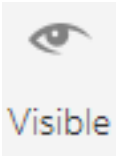
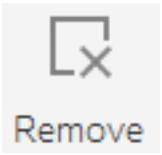
   A user with this role can then configure defect or run fields in QoT for all users.

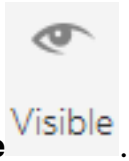


2. **Configure defect or run fields in QoT**

a. Select the **QoT Menu** on the top-right corner of the screen and select **Entity Settings > Defect/Run (sets all users)**.

b. Set the defect or run fields.

UI Element	Description
	Saves the changes made in Defect or Run Configuration.
	Rolls back to the last saved state.
	Moves the selected field up or down in the order.
	Enables you to set which fields a user can see and which should be hidden. **Note:** Certain critical fields cannot be hidden.
	Removes a select field.
	Opens the Add Fields for Selection pane, enabling you add defect or run fields.
Field Name	The field name.
Visible	Indicates whether the field is visible.
Required	Indicates whether the field is required.

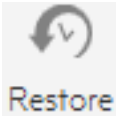
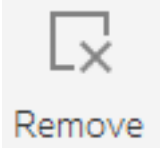
UI Element	Description
Default Value	Indicates the default value of the field. **Note:** ◦ If you download a planned run from ALM Octane, any field values already defined in ALM Octane will override the default QoT values. ◦ If you download a planned run that has a blank value in ALM Octane and set a default value in QoT, the default QoT value will be used.
NOT VISIBLE	Lists hidden fields. To move a field from the Not Visible pane, select it and then select **Visible**  .

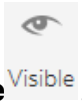
Set defect or run entities for the current user

You can set which fields to display when submitting defects or manual runs from QoT. You can also define which fields are required.

> **Note:** The settings apply to the currently logged in user and to the device in use.

1. Select the **QoT Menu** on the top-right corner of the screen and select **Entity Settings > Defect/Run (sets current user)**.
2. Configure the fields:

UI Element	Description
	Saves your configuration changes.
	Rolls back to the last saved state.
	Moves the selected field up or down in the order.
	Enables you to set which fields a user can see and which should be hidden. **Note:** Certain critical fields cannot be hidden.
	Removes a select field.

UI Element	Description
	Opens the Add Fields for Selection pane, enabling you add fields.
Field Name	The field name.
Visible	Indicates whether the field is visible.
Required	Indicates whether the field is required.
Default Value	Indicates the default value of the field. **Note:** Setting new values will overwrite the values set through the **Entity Settings > Defect/Run (sets all users)** option. For more details, see "Set defect or run entities for all users (administrator permissions required)" on page 58.
	Lists hidden fields. To move a field from the Not Visible pane, select it and then select **Visible**  .

Limitations for QoT and ALM Octane

This section lists the known issues when working with QoT for ALM Octane.

- QoT does not support attachments in run steps.
- QoT does not support manual runs created from Gherkin tests, scenario tests, and model-based tests, and child manual runs created from Gherkin tests, scenario tests, and model-based tests in a test suite.
- In ALM Octane, each run includes a **Started** field to record the time of its first execution. However, the runs uploaded from QoT to ALM Octane will display the time they were uploaded for the first time to this field.
- After you use QoT 2.4 to connect with the ALM Octane server, previous versions of QoT may no longer be stable on the ALM Octane server.
- QoT versions 2.10 and lower do not support the ALM Octane feature of manual test order enforcement (version 23.4.24 and higher).
- The string **qot** is reserved and will not be returned in a search. To find items whose title contains **qot**, use a more detailed search string such as **[qot]**.