

Setup and Configuration

Setting up Appvibe Test Management for monday.com is a straightforward process designed to fit seamlessly into your existing workflows. This chapter covers everything from installing and configuring the tool to customizing it for your team's unique testing needs. Follow the step-by-step guides to ensure a smooth setup, and use the configuration tips to optimize your testing processes from day one.

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Installing Appvibe Test Management

Getting started with **Appvibe Test Management for monday.com** is simple and fast. This page outlines the installation process and any prerequisites needed to ensure a smooth integration.

Prerequisites:

Before installing Appvibe, ensure you have the following:

- **monday.com Account:** You need an active monday.com account. Admin-level access is required for installation.
- **Appvibe Subscription:** Ensure you have an Appvibe license or subscription. Contact Appvibe support if you're unsure of your license status.
- **Permissions:** Make sure you have the correct permissions in monday.com to install third-party apps and access the boards where you plan to manage test cases.

Step-by-Step Installation Guide:

1. **Access the monday.com App Marketplace:**
 - Log in to your monday.com account.
 - Navigate to the **App Marketplace** from the menu on the left side of the screen.
2. **Search for Appvibe Test Management:**
 - In the search bar, type "**Appvibe Test Management**" and select it from the results.
3. **Install the App:**
 - Click the "**Install**" button and follow the on-screen prompts to add Appvibe to your monday.com environment.
4. **Authorize the Integration:**
 - You'll be prompted to grant permissions for Appvibe to access your monday.com account. This allows Appvibe to interact with your boards, update test cases, and execute test cycles.
 - Click **Authorize** to proceed.
5. **Set Up Your First Test Management Board:**
 - Once installed, Appvibe will guide you through creating a **Test Management Board**. This board will serve as the hub for all your test cases, test cycles, and reports.
 - You can either create a new board dedicated to test management or integrate Appvibe into an existing board.
6. **Invite Team Members:**

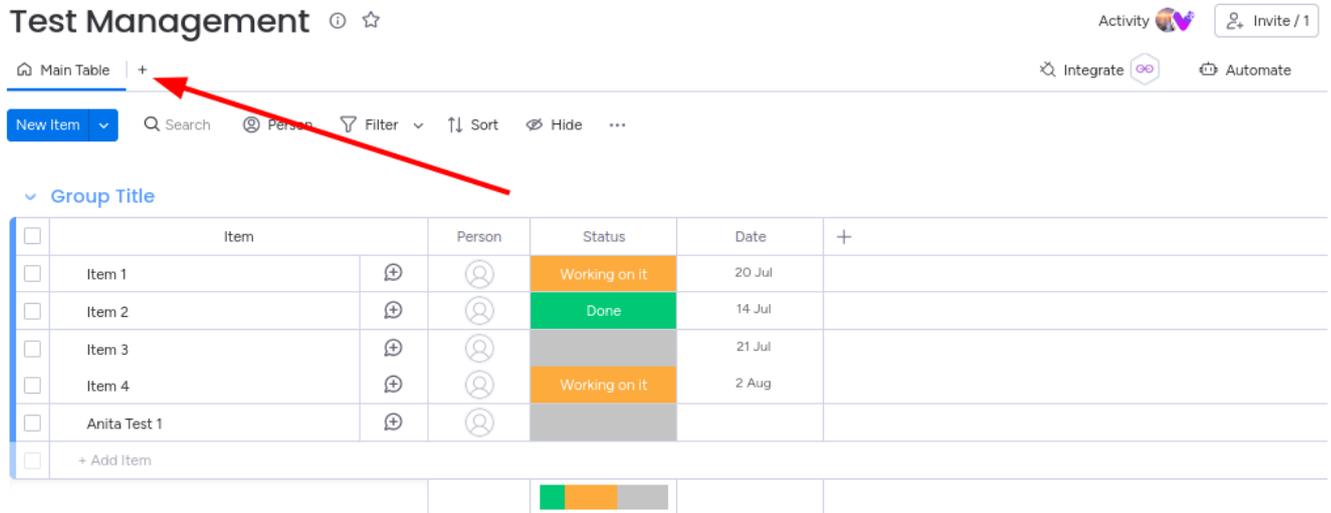
- Use monday.com's invite functionality to add team members to your Test Management Board. Ensure that each team member has the correct permissions (e.g., Testers, Test Managers).

Your Appvibe Test Management setup is now complete! You can proceed to the configuration steps to tailor the tool to your needs.

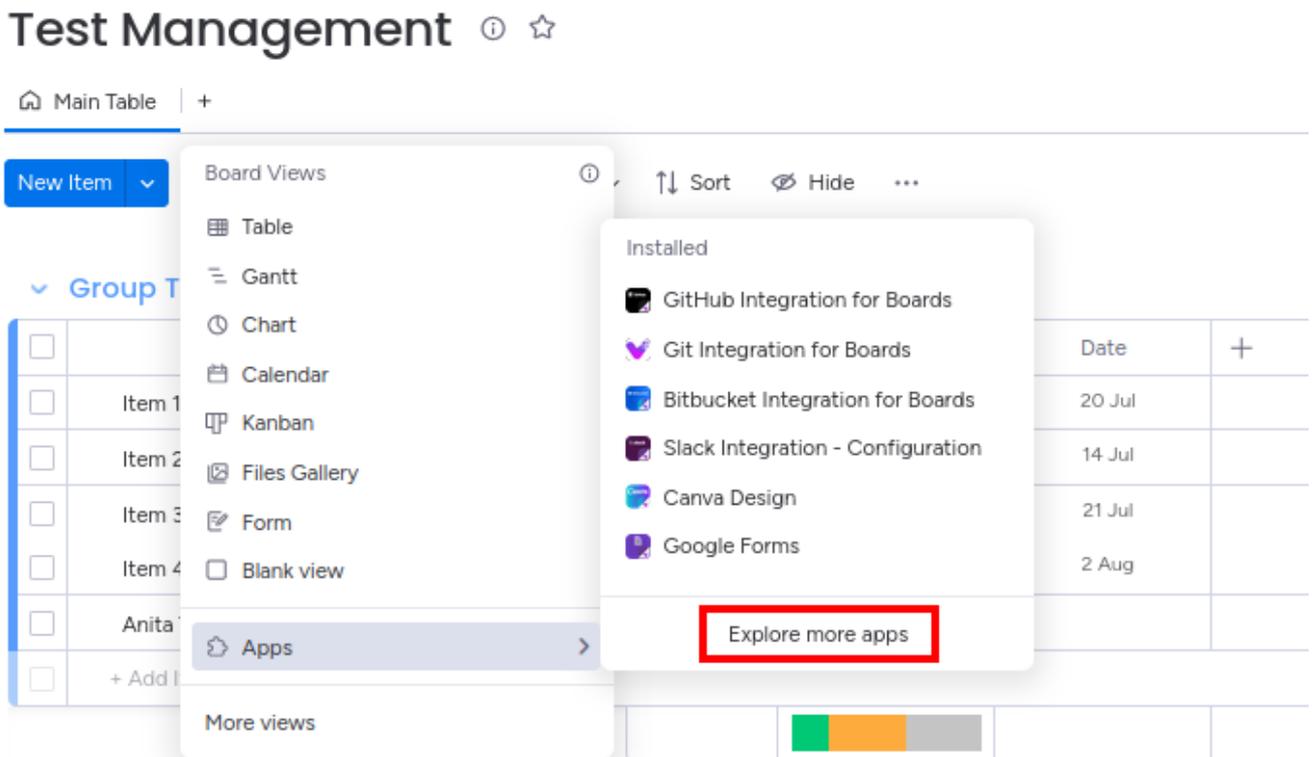
Getting Started

After installing the app, first, add it to your board view, by following these steps:

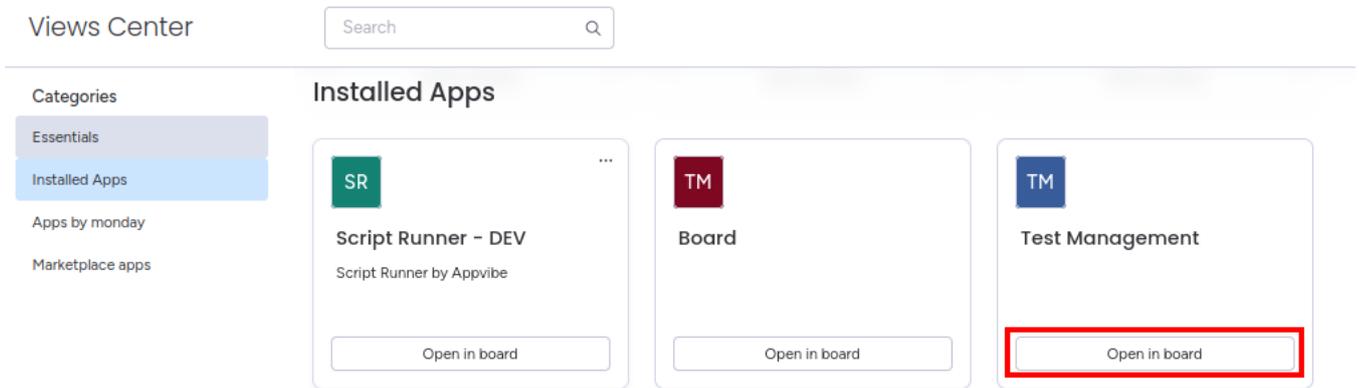
1. Click on the + icon for your monday board



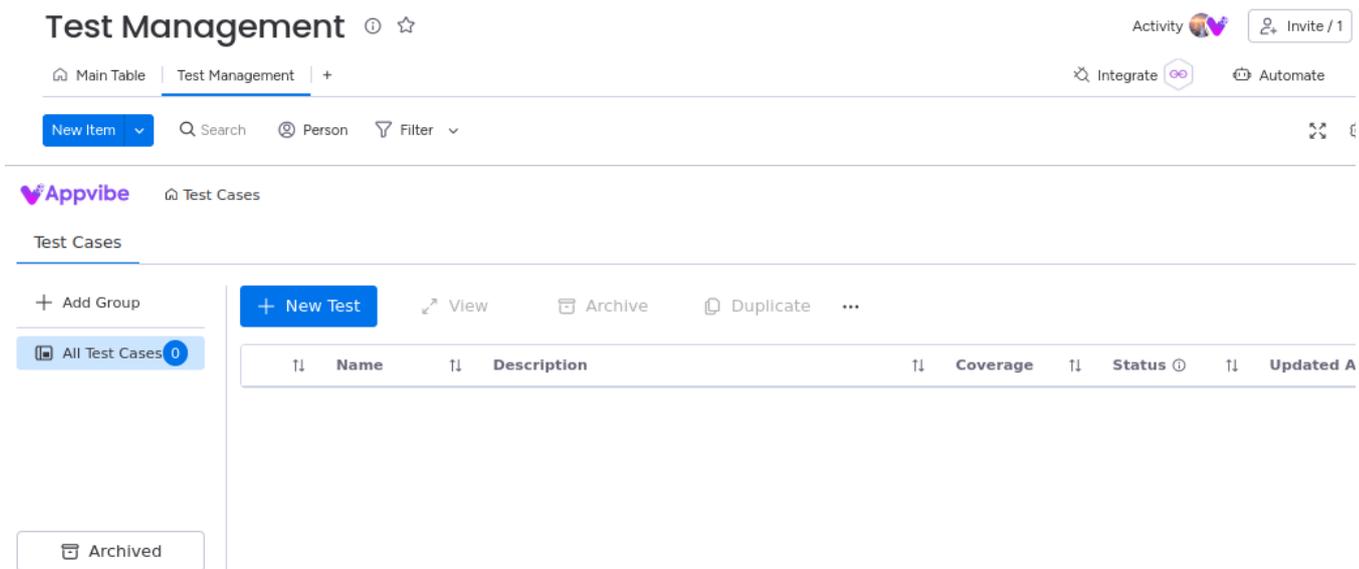
2. Go to "Apps" > "Explore more apps"



3. Under "Installed Apps" find the Test Management app and click on "Open in board"

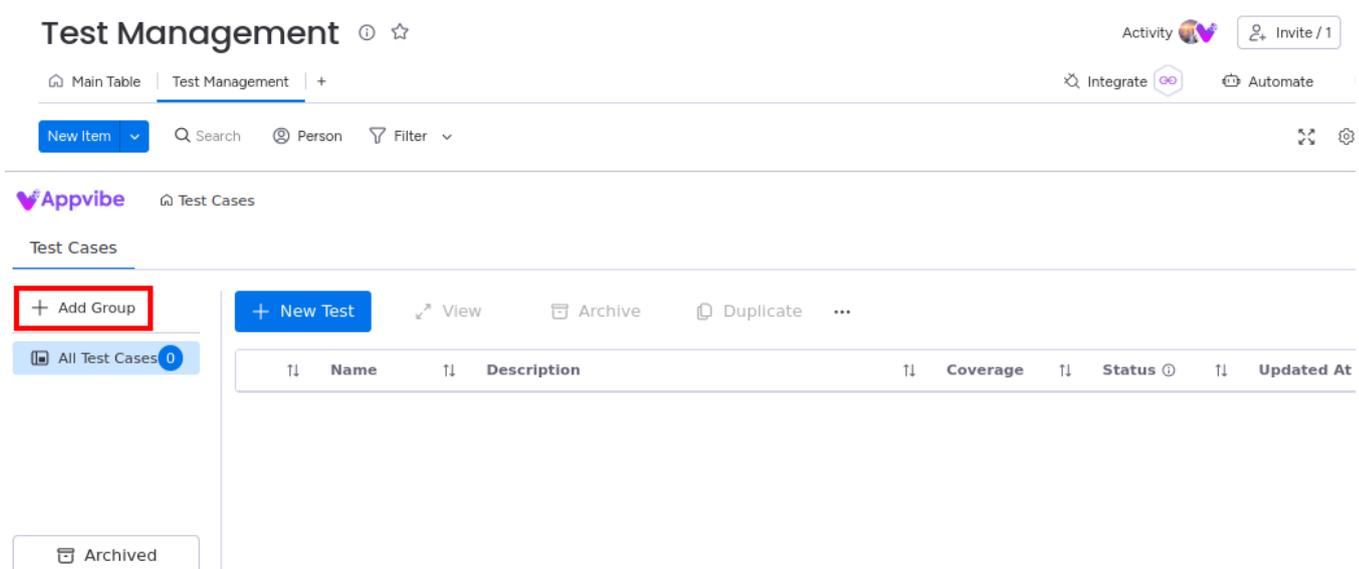


4. Now the app is added to your board:



Create a Test Group

1. To create a test group, click on "Add Group"



2. Fill in the n

Create Test Group

Group Name

Test Group #1

Select Test cases

Cancel

Confirm

dropdown.

3. Click on Confirm to save.

Create a Test Case

1. To create a test case, click on "New Test".

The screenshot displays the Appvibe Test Management interface. At the top, there's a navigation bar with 'Test Management' selected. Below it, a toolbar contains a 'New Item' dropdown, search, person, and filter icons. The main content area shows a list of test cases with a table header including 'Name', 'Description', 'Coverage', 'Status', and 'Updated At'. A red box highlights the '+ New Test' button in the top left of the table area. On the left sidebar, there are filters for 'All Test Cases' and 'Test Group #1', and an 'Archived' button at the bottom.

2. Fill out the

Create test

ect it from the

Test Name

Testing for item 1

Test Description

This is a test

Test Group #1

Cancel

Confirm

dropdown.

3. Click on Confirm to save.

Edit the test case and add testing steps

1. Select a test case from the table by checking the box next to it

Test Management ⓘ ☆

Activity  Invite / 1

Main Table | Test Management | +

Integrate  Automate 

New Item ▾ Search Person Filter ▾

Appvibe Test Cases

Test Cases

+ Add Group

- All Test Cases 1
- Test Group #1 1

Archived

+ New Test View Archive Duplicate ...

↕	Name	Description	↕	Coverage	↕	Status ⓘ	↕	Updated At
<input checked="" type="checkbox"/>	Testing for ite...	This is a test		None		Draft		2023-11-07



2. Click on "View" in the menu

The screenshot shows the Appvibe Test Management interface. At the top, there's a header with 'Test Management' and navigation options like 'Main Table' and 'Test Management'. Below the header, there's a table of test cases. The first test case is highlighted, and the 'View' button next to it is enclosed in a red box. The table has columns for Name, Description, Coverage, Status, and Updated At.

	Name	Description	Coverage	Status	Updated At
<input checked="" type="checkbox"/>	Testing for ite...	This is a test	None	Draft	2023-11-07

3. Here, you can edit the basic details of the test. You can also edit the status of the test Draft/Approved/Declined. This can be used to signal to the team which tests should be used.

The screenshot shows the Appvibe Test Management interface for editing a test case. The 'Details' tab is selected. The test case name is 'Testing for item 1' and the description is 'This is a test'. The 'Coverage' field is highlighted with a red box and has a '+Add' button next to it. The 'Status' field is set to 'Draft'.

4. Use the "Coverage" field to add tests to your monday board "Main Table". This will allow you and your team to execute the steps you add to the test. You can add multiple items to one test case.

The screenshot shows the Appvibe Test Management interface for editing a test case. The 'Details' tab is selected. The test case name is 'Testing for item 1' and the description is 'This is a test'. The 'Coverage' field is highlighted with a red box and has a '+Add' button next to it. A red arrow points to the '+Add' button.

Test Management ⓘ ☆

Activity Invite / 1

Main Table | **Test Management** | +

Integrate Automate

New Item ▾ Search Person Filter ▾

Appvibe Test Cases > Testing for item 1

Details | **Script**

Name:
Testing for item 1

Description:
This is a test

Coverage:
None

Status:
Draft

Add New Item ✕

Name

Cancel Save

5. To add testing steps, switch to the "Script" tab and click on "Create Step".

Test Management ⓘ ☆

Activity Invite / 1

Main Table | **Test Management** | +

Integrate Automate

New Item ▾ Search Person Filter ▾

Appvibe Test Cases > Testing for item 1

Details | **Script**

Steps ▾

+ Create S

No script created yet

6. Fill out the details of the testing step. Repeat it for as many testing steps you need.

Appvibe Test Cases > Testing for item 1

Details | **Script**

Steps ▾ **+ Create S**

Step: Step 1

Step 1

Instructions

Parameters: +Add M

Name	Value

Using the Item View

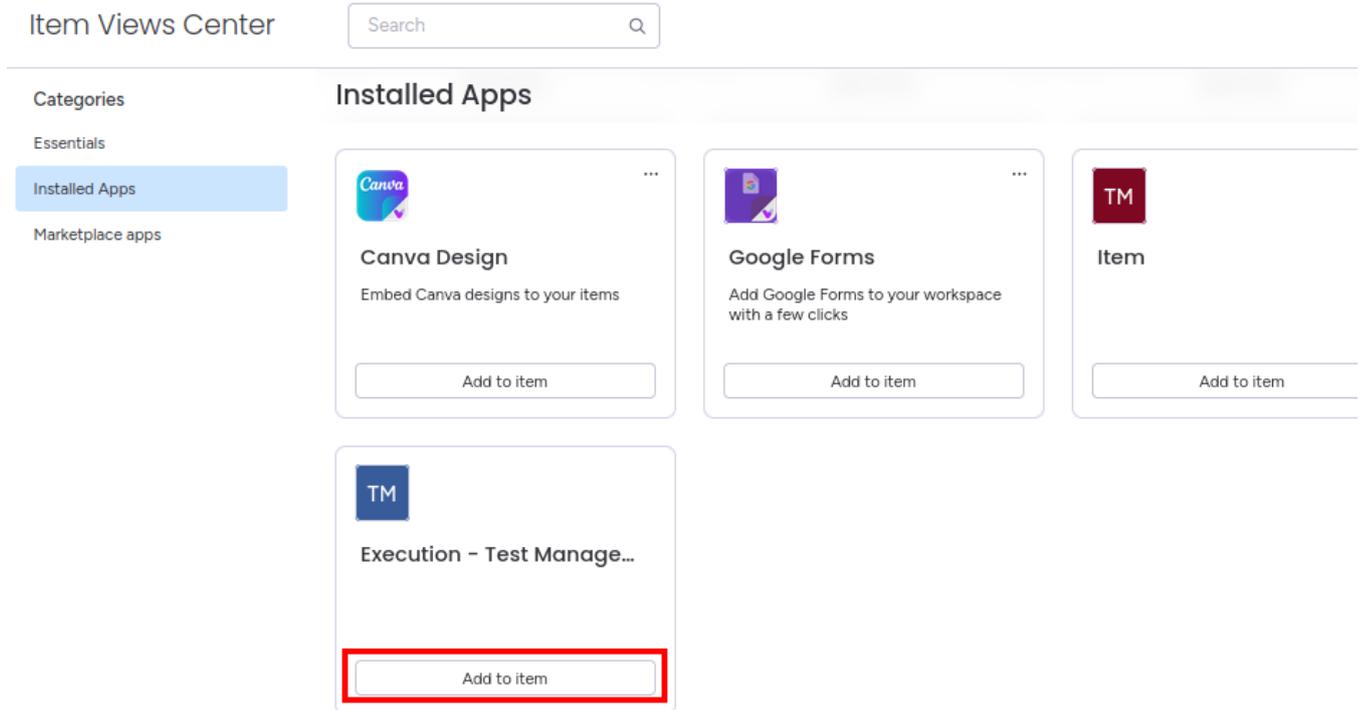
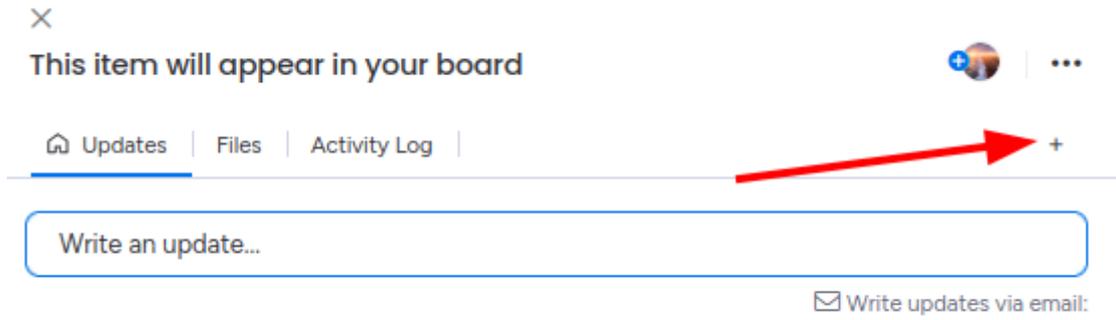
Use the item view to execute the testing steps you added according to the previous instructions.

1. Open the item you or a team mate has added from the "Coverage" field.

The screenshot shows the 'Test Management' interface. At the top, there's a title 'Test Management' with an information icon and a star. Below it, there are navigation tabs for 'Main Table' and 'Test Management'. A toolbar contains a 'New Item' button, a search field, and icons for 'Person', 'Filter', 'Sort', and 'Hide'. A dropdown menu is open under 'Group Title'. The main area is a table with columns: 'Item', 'Person', 'Status', and 'Date'. The table contains several rows, including 'Item 1' (Working on it), 'Item 2' (Done), 'Item 3', 'Item 4' (Working on it), and 'Test 1'. A red box highlights the 'Open' button in the 'Item' column of the 'Test 1' row. Below the table, there's a progress bar with green, orange, and grey segments.

<input type="checkbox"/>	Item		Person	Status	Date	+
<input type="checkbox"/>	Item 1			Working on it	20 Jul	
<input type="checkbox"/>	Item 2			Done	14 Jul	
<input type="checkbox"/>	Item 3				21 Jul	
<input type="checkbox"/>	Item 4			Working on it	2 Aug	
<input type="checkbox"/>	Test 1					
<input type="checkbox"/>	> This item will appear in y...					
<input type="checkbox"/>	+ Add Item					

2. If you don't see the Test Management Execution screen, click on the + icon and find it under the installed item views.



3. On the execution screen, you can update the status of the testing step. You can also type in the actual result of your test.

This screenshot shows the test execution interface. The breadcrumb trail is: AppVee > Test Cases > Testing for item 1 > This item will appear in your board. The test step is named 'Step 1' with the description 'Instructions' and parameters 'N/A: N/A'. The 'Actual Result' field is highlighted with a red box and contains the text 'Type in...'. The status dropdown menu is also highlighted with a red box and shows four options: 'Not executed' (grey), 'Working on it' (yellow), 'Passed' (green), and 'Failed' (red). The 'Status changed at' field shows 'Invalid date' and the 'Executed By' field is empty.

4. When you execute the testing step, the app will record that you worked on it.

This screenshot shows the test execution interface after the test has been executed. The breadcrumb trail is: AppVee > Test Cases > Testing for item 1 > This item will appear in your board. The test step is named 'Step 1' with the description 'Instructions' and parameters 'N/A: N/A'. The 'Actual Result' field is highlighted with a red box and contains the text 'Test was successful.'. The status dropdown menu is also highlighted with a red box and shows four options: 'Not executed' (grey), 'Working on it' (yellow), 'Passed' (green), and 'Failed' (red). The 'Status changed at' field shows the date and time '2023-11-07 10:48:00' and the 'Executed By' field is highlighted with a red box and contains the user's profile picture.

Configuration Settings

Once Appvibe Test Management is installed in your monday.com account, you can configure the tool to match your team's testing workflow. Proper configuration will help streamline test case creation, test execution, and reporting.

Key Configuration Areas:

1. Board Customization:

- Once your Test Management Board is set up, you can customize it to reflect the key elements of your testing process.
- **Columns:** Add or modify columns for the Test Case ID, Test Step, Expected Result, Actual Result, Status (Pass/Fail), and other relevant information.
- **Groups:** Organize your board into groups such as "New Test Cases," "In Progress," and "Completed" to manage test case workflows.

2. Permissions and Roles:

- Assign user roles to define who can create, modify, and execute test cases. Common roles include:
 - **Tester:** Can execute test cases and record results.
 - **Test Manager:** Can create, modify, and manage test cases, test cycles, and results.
- Set permissions for each role to ensure only authorized team members can make changes to critical data.

3. Automations:

- Set up monday.com automations to streamline workflows. For example:
 - Automatically move test cases from the "New Test Cases" group to the "In Progress" group when execution begins.
 - Notify team members when a new test cycle is ready for execution or when a test case is assigned to them.

4. Integrations:

- Appvibe integrates with other tools like Jira, GitHub, and external testing tools. Configure these integrations based on your team's needs to ensure a smooth flow of information.
- For example, you can link failed test cases to Jira tickets for easier defect tracking and resolution.

5. Status Labels:

- Configure status labels for your test cases and test cycles. For example, use labels like "Passed," "Failed," "Blocked," and "In Progress" to track the status of test execution.
- You can customize these labels based on your team's terminology and preferences.

6. Custom Fields:

- Add custom fields to capture specific information about your test cases. For example, you may want to add fields for **Priority**, **Severity**, or **Test Case Type** (e.g., Functional, Regression).

Initial Setup Checklist

To ensure everything is properly configured and ready for use, follow this checklist after setting up Appvibe Test Management in monday.com:

1. Test Management Board Created

- Ensure your Test Management Board is set up with the correct columns and groups (e.g., Test Case ID, Status, Expected Results).

2. User Roles and Permissions Assigned

- Verify that team members are assigned appropriate roles (Testers, Test Managers) and have the correct permissions.

3. Automation Rules Enabled

- Confirm that automation rules are working properly to help with task assignments, notifications, and board updates.

4. Test Cases Entered

- Add a few test cases to your Test Management Board to ensure the setup is functioning as expected.
- Make sure test case templates are easy to use and test steps are clear.

5. Test Cycle Configured

- Create an initial test cycle to group your test cases for execution.
- Assign test cases to the test cycle and verify the priority and deadlines are set correctly.

6. Status Labels and Custom Fields Configured

- Verify that your status labels (e.g., Passed, Failed, Blocked) and custom fields (e.g., Priority, Severity) are correctly configured and applied to test cases.

7. Integrations Set Up (If Needed)

- If you're using integrations (e.g., Jira, GitHub), ensure they are correctly configured and synced with your monday.com boards.

8. Invite Team Members

- Make sure all necessary team members have been added to the Test Management Board and have access to Appvibe Test Management.

Once all these steps have been completed, you're ready to start using Appvibe Test Management to create, execute, and manage your test cases efficiently within monday.com!