AI-Powered Virtual Search Assistant

The AI-Powered Virtual Search Assistant feature is in its Beta version and only available with QTM Cloud edition.

Introduction

QI's virtual search assistant simplifies search with natural language queries. This advanced search feature can summarize features, offer best practices, and help navigate troubleshooting issues.

Administrators can upload project-specific documents in various formats like PDFs, Confluence spaces, or web URLs, facilitating seamless access for testing teams to learn on-the-go.

Note:

- Users should have a valid account on the OpenAI Platform with sufficient balance to access this AI-powered search feature.
- The search function supports only English language.
- Users must use specific queries rather than only keywords for effective results.
- The search does not correct spelling errors in your query.
- The AI Search feature will be temporarily unavailable while configuring project documentation.

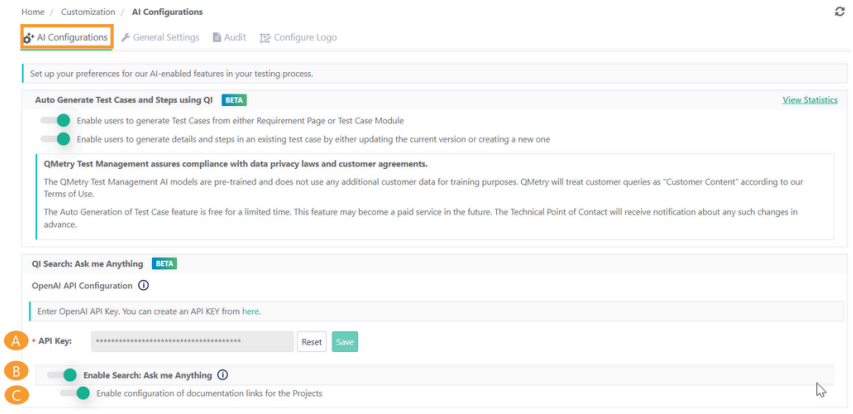
QMetry Intelligence Configuration

To activate the QI search feature, the QTM super administrator needs to enable it for the QMetry instance from:

Customization > General Settings & Audit > AI Configuration

Notes:

- Only super admin can access and configure QMetry Intelligence Configuration.
- The default setting for QI feature is disabled.



To Enable AI search, these are the steps:

A. OpenAI API Configuration: Enter the API Key generated from the OpenAI platform to enable the QI feature.

B. Enable Search: Ask me anything: This feature allows users to search text in QTM help and FAQ documentation.

C. Enable configuration of documentation links for the Projects: Allow users with QMetry Intelligent Search "Modify" permissions to configure project-specific documentation for AI search.

Project Documentation Configuration

Project admins can configure project-specific documentation or knowledge bases. If configured, all users will have the option to select this personalized documentation as a source for information search, in addition to the standard product help documentation.

To enable “Enable configuration of documentation links for the Projects” navigate to:

Customization > General Settings & Audit > QI Configuration.

The default for this setting is disabled.

Required Permissions:

With Customization Package:

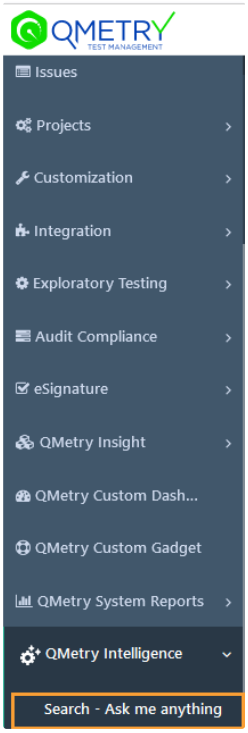
- **Project Admins** and users with **QMetry Intelligent Search "Modify"** permissions can configure Project Documentation settings.
- Users with only **"View"** rights can view the configuration but cannot modify it.

Without Customization Package:

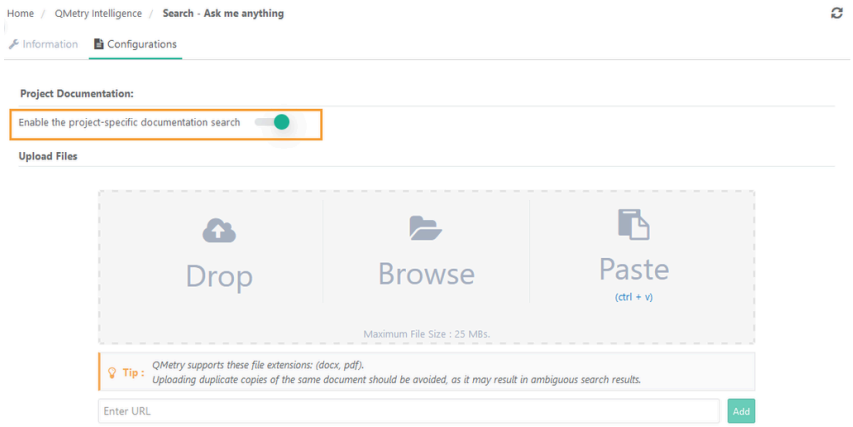
- Users with **Admin** and **QA Manager** roles can access and configure Project Documentation settings.
- Users with other roles can only view the configuration.

Steps

1. Go to **QMetry Intelligence > Search - Ask me anything**.



2. Enable the **Enable the project-specific documentation search** option. (Default: Disabled)



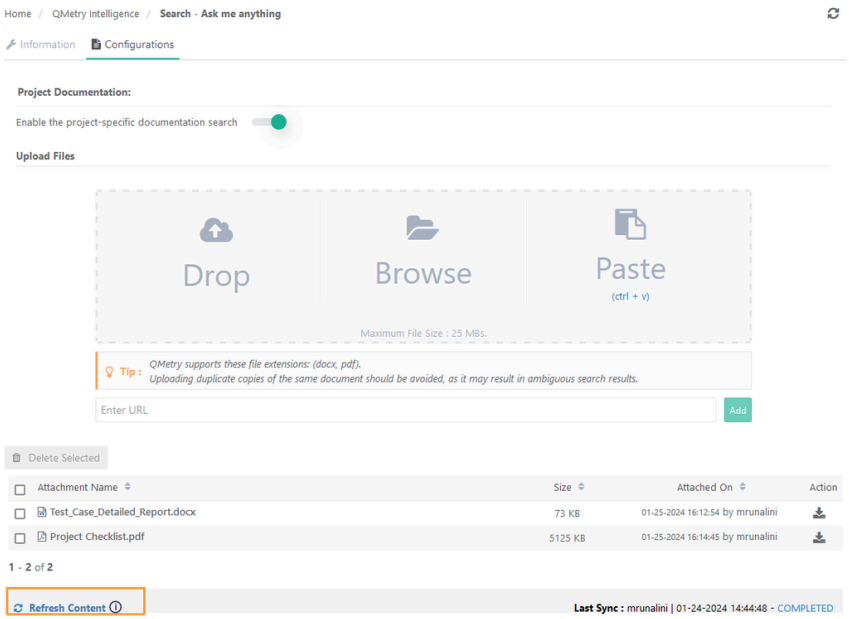
Configure URL/Documentation Files

- Project Admins can configure documentation links or upload documents in Word (docx) and PDF formats.

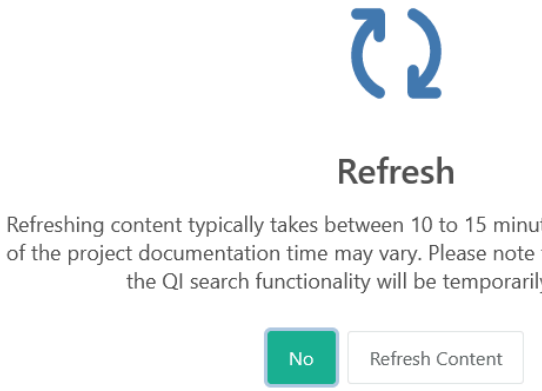
- Multiple Confluence Spaces (i.e., documentation links) can be configured within a single project.
- Ensure that the Confluence Space is publicly accessible to allow all users to view the information.
- In addition to configuring publicly accessible Confluence Spaces, users can upload multiple documents in Word (docx) and PDF formats.
- Refresh the content after uploading the documents.

Notes:

- The file (Word/PDF) with a maximum of 25 MB size can be uploaded.
- Refresh the content once you upload the Confluence URL or documents.
- The QI Search functionality will not be available during the process.
- Duplicate copies of the same document shall not be uploaded in a project as it may lead to ambiguous answers from the model.



On clicking on the **Refresh Content** option, the confirmation message pops up. Read the instructions carefully.



Access the Search Feature

In addition to standard project entity searches, QMetry Intelligent Search provides the capability to search within QTM help documentation and configure project-specific documentation through documents and links.

A. Project Search

- **Default Search:** Users can search by keyword in Entity Key, Summary, Description, and Test Step. This search option is available by default and requires no additional configuration.

B. QMetry Intelligent Search Configuration

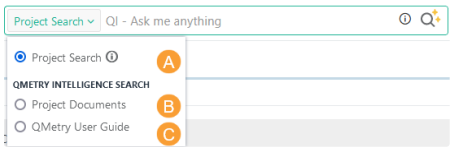
- **Search: Ask Me Anything Feature:** The QTM help documentation is configured as a source for this search, allowing users to find the required information.

C. Project Documents

- Project Administrators can configure project-specific documentation in addition to the default QTM help documentation.

D. QMetry User Guide

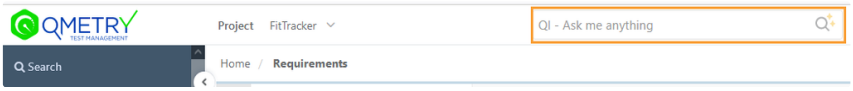
- The QMetry User Guide option becomes visible when the **Search: Ask Me Anything** feature is enabled.



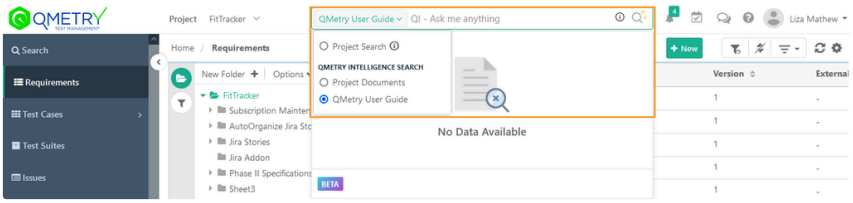
Steps to use QI Search: Ask me Anything

1. Log into **QMetry Test Management**.

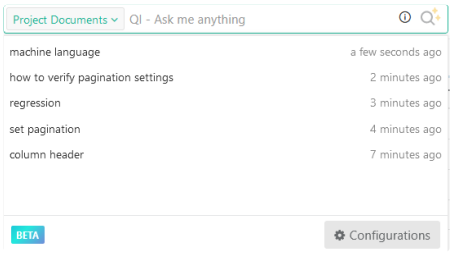
2. Users can access the AI-powered Search feature by clicking on the **QI - Ask me anything** search box provided on the header of the application.



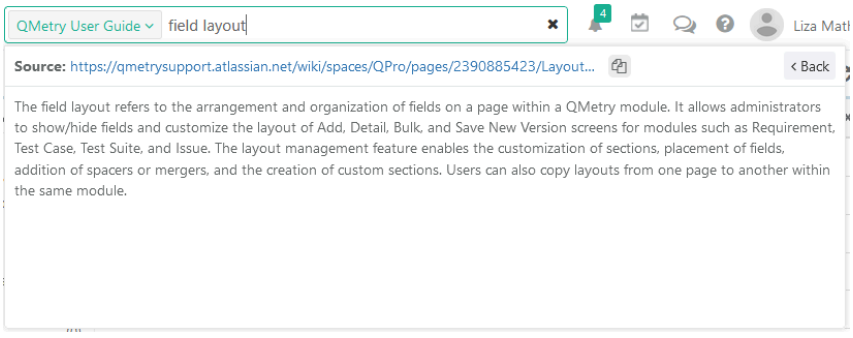
3. Open the drop-down and select the Source documentation from where you want to search for the required information.



- **Project Documents:** This option is available only when the “Enable the project-specific documentation search” option is enabled from AI configurations.



- **QMetry User Guide:** The QTM User Guide is configured by default. Users can access information from the guide without doing any configuration.



Search Functionality

1. **Entering Search Text**
   - Select the desired source from the drop-down list.
   - Enter the search text in the search box.
   - Press enter on the keyboard or click the Search icon.
2. **Viewing Search Results**
   - The search results will display the relevant information along with a source link for further details.
3. **Handling No Results**

- If no relevant data is found in the QMetry User Guide, the source link will be blank. In this case, the displayed answer is generated from trained data in OpenAI.

4. **Accessing Previous Searches**
   - A list of previously asked questions will be visible in the search box.
   - To re-search a previous question, select it from the list and press enter or click the Search icon to get the latest results. Simply clicking on a previous question will return historical search results only.

Modify Configuration

To modify configurations, click on the **Configuration** button on the Search panel.

→ **Prerequisite:** To modify the configuration of Project documentation, the users should have the QMetry Intelligence Search “Modify” permissions.

This will navigate to **Search: Ask Me Anything Configuration** screen under the QMetry Intelligence module if you have the required permissions.

Refresh Content

Click on the **Refresh Content** option to keep the search results updated with the latest documentation changes.

Unlink Project Documents

Users can remove the configured project documentation if it is no longer required.

Steps

1. To delete/unlink the configured documentation for the project, select the attached document.

2. Click on the **Delete Select** button above.

To delete multiple documents at a time, select multiple documents and click on the **Delete Selected** button.

The warning message appears.

- The Delete action will permanently delete the file/confluence URL attached to this project.
- The deleting and refreshing of the content process takes time in accordance with the size of the documentation. During the refresh operation, the QI Search functionality will not be available.

To delete the configuration of the documentation with the project, click on the **Delete & Refresh Content** button.