Quathera

Test Sites Configuration Guide

Complete guide for configuring test sites, user types, and environments.

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Table of Contents

1. What Are Test Sites?

Test Sites are the foundation of Quathera testing. A Test Site defines:

- WHERE to test (the URL of your application)

- WHO to test as (the user type/credentials)

- WHICH environment (QA, Staging, or Production)

Why Multiple Test Sites?

Most web applications have different user roles that see different forms and features:

- An Admin user might see user management, settings, and configuration forms

- A Regular User might see customer-facing forms like profiles and orders

- A Manager might see approval workflows and reports

To get complete test coverage, you need to test as each user type. This is why you create multiple test sites - one for each user type you want to test.

2. User Types Explained

A 'User Type' represents a role or permission level in your application. Common examples:

Example User Types:

- • Super Admin: Full system access, can manage everything

- • Admin: Administrative access, user management

- • Manager: Approval rights, team oversight

- • Regular User: Standard customer/employee access

- • Guest: Limited access, read-only or public pages

How AI Uses User Types:

During Form Discovery, AI logs in as each configured user type and explores the application from that perspective. This ensures:

- • All forms accessible to each role are discovered

- • Role-specific forms are properly identified

- • Access control can be tested (which users can see which forms)

3. Environments (QA/Staging/Production)

Quathera supports testing across multiple environments:

QA Environment:

- This is where AI Discovery happens
- Safe to explore - test data can be created/modified
- AI crawls freely to find all forms
- Recommended: Always run discovery on QA first

Staging Environment:

- Pre-production validation
- Run tests here after discovery on QA
- Good for final verification before release

Production Environment:

- Live environment - use with caution
- Good for smoke tests and monitoring
- AI will NOT run discovery on Production (too risky)
- Only runs pre-defined test scenarios

Important: AI discovers forms ONLY on QA environment. Once forms are discovered and mapped, you can run tests on any environment (QA, Staging, or Production).

4. Creating a Test Site

Step-by-step instructions to create a new test site:

Steps:

1. Navigate to your project dashboard

2. Click 'Test Sites' in the sidebar

3. Click 'Add Test Site' button

4. Fill in the required fields:

Required Fields:

- Name: A descriptive name (e.g., 'Admin - QA', 'Regular User - Staging')

- URL: The starting URL (usually login page or home page)

- Environment: Select QA, Staging, or Production

- Requires Login: Yes or No

If Login Required:

- Username: The login username or email

- Password: The login password

- Login URL: The URL of the login page (if different from starting URL)

5. Click 'Save' to create the test site

5. Login vs No-Login Sites

Login Sites (Requires Login = Yes):

Use this when your application requires authentication:

- Most web applications with user accounts

- Admin panels

- Customer portals

- Any page behind a login wall

How AI handles login:

1. AI navigates to the login URL

2. AI identifies the username and password fields

3. AI enters credentials and submits

4. AI waits for successful login

5. AI begins discovery/testing from the logged-in state

No-Login Sites (Requires Login = No):

Use this for:

- Public pages (contact forms, registration)

- Electron desktop applications

- Kiosk mode applications

- Pre-authenticated environments (SSO handled externally)

6. Credential Storage & Security

Your test credentials are handled securely:

Where Credentials Are Stored:

- Credentials are stored locally on the Desktop Agent machine

- They are encrypted at rest

- Credentials NEVER leave your network

- The Quathera cloud servers never see your passwords

Security Best Practices:

- Use dedicated test accounts, not personal accounts

- Create accounts specifically for automation testing

- Use strong passwords even for test accounts

- Rotate test account passwords periodically

- Limit test account permissions to what's needed

7. Managing Multiple Test Sites

Typical Setup Example:

For a typical web application, you might have:

QA Environment:

- Admin - QA (admin@company.com)
- Manager - QA (manager@company.com)
- User - QA (user@company.com)

Staging Environment:

- Admin - Staging (admin@company.com)
- Manager - Staging (manager@company.com)
- User - Staging (user@company.com)

Production Environment:

- Smoke Test User - Prod (smoketest@company.com)

This gives you 7 test sites total, allowing comprehensive testing across all roles and environments.

8. Best Practices

Naming Conventions:

Use clear, consistent names: [Role] - [Environment]

- Good: 'Admin - QA', 'Regular User - Staging'

- Bad: 'Test1', 'Site2', 'MyAccount'

Start with QA:

Always run AI Discovery on QA environment first. This is the safest place for AI to explore and create test data.

One User Type Per Test Site:

Don't mix user types. Create separate test sites for each role you want to test.

Keep Credentials Updated:

If passwords change, update the test site immediately. Expired credentials will cause discovery and tests to fail.