



Getting Started

Revised January 24, 2026

The following sections will help you get started with iALM.ai quickly. For more information, you may want to consult the complete help at <https://ialm.ai/support/help.php>

Logging in the First Time

If your account was set up as a Site Manager only, when you login, you will be logged into the site management portal where you will be allowed to perform only site management tasks. You will not be allowed to perform any project tasks unless your account is also set up with additional privileges such as Project Manager, Product Owner, Team Member, etc. A site manager can add these privileges to his/her account after logging in.

All purchased licenses are provisioned with one account set up as a Site Manager only.

If your account was set up with additional privileges such as Project Manager, Product Owner, Team Member, etc., when you login, you will have the option to login either as a Site Manager or Project Manager, Product Owner, Team Member, etc.

All free trial sites are provisioned with one account set up with Site Manager, Project Manager, and Product Owner privilege.

Changing Your Password

We strongly recommend that, on your first login, you change your password to something you can remember. Your credentials to log at the IALM.ai site is also the same to log into your iALM.ai Support Portal at <https://ialm.ai/support/> to submit a ticket or a question.

1. Adding Users to the Site (Site Manager)

This step is essential to add users to your IALM.ai site so that they can work on different projects. If you are trying IALM.ai for the first time and just want to explore its features on your own, there is no need to add other users. **You can just login as a site manager as described below and grant yourself all the privilege just to be able to perform different functions within IALM.ai.** Once you do that and save the changes, you can logout from the Site Management session and login again as a product owner/project manager. You can always add more users to the site at a later time. We strongly recommend reviewing the recording titled "[First Things First: Managing User Pool in iALM.ai](#)"

iALM.ai

Manage Site

- Manage Users Pool
- Manage Custom Attributes
- Work With Projects
- Configure UFT Integration

Products

Add new user

* First Name:

* Last Name:

Phone Number:

* E-mail Address:

* User Type:

Site Manager Product Owner Project Manager or ScrumMaster

Release Manager Team Member Customer

Site Manager : May have more than one per site. May perform any of the tasks on the Site Manager interface.

Product Owner : May have only one for each product. May perform any of the tasks listed under the product, including creating a project for the product.

Project Manager/Scrum Master : May have one for each project. Responsible for performing all project management tasks within projects assigned to him but NOT create projects.

Team Member : May have more than one per project. A team member may work on multiple projects as assigned by project managers. May perform any task with the project, except project manager's tasks. Privileges of a team member are determined by the project manager.

Customer : May have more than one for any project. Have limited access to certain reports as dictated by the project manage but can not perform any project tasks.

Release Manager : Able to create releases, add features to a release, and remove features from a release.



- a. Login as a Site Manager. If this is your first login, please change your password to something you can remember.
- b. On the left menu click "Manage Users Pool", then click "New" button to add new user.
- c. Fill in all required fields and click "Save".
- d. Repeat step 2 and 3 to add more users. The number of users you can add depends on how many users your site was authorized to have.
- e. You can logout after you add users and login as a Product Owner and Project Manager to create your first project, assign team members to that project, and perform other project management tasks below. Only project manager user types can create projects.

User Types

- **Site Manager:** May have more than one per site. May perform any of the tasks on the Site Manager interface.
- **Product Owner:** May have only one for each product. May perform any of the tasks listed under the product, including creating projects for the product.
- **Project Manager/Scrum Master:** May have one for each project. Responsible for performing all project management tasks within projects assigned to him/her. Under the current architecture, a project manager cannot create a project. Only product owners can create a project. The site admin wishes to allow project managers to create projects, then he or she must grant them product owner privilege.
- **Team Member:** May have more than one per project. A team member may work on multiple projects assigned by project managers. May perform any task with the project, except project manager's tasks. The privileges of a team member are determined by the project manager.
- **Customer:** May have more than one for any project. Have limited access to certain reports as dictated by the project manager but cannot perform any project tasks.



- **Release Manager:** Able to create releases, add features to a release, and remove features from a release.

2. **Creating a Product or a System** (Product Owner)

Before you can create a project, a product owner needs to create a product or a system. Projects in iALM.ai are created to implement features for a product or a system. You can have as many projects as you wish for a given product or a system, each project delivering a set of features for the product or the system. Those projects can run sequentially or concurrently. You can also have as many products as you want on an iALM.ai site.

We strongly recommend reviewing the recording titled "[Creating your First Product in iALM.ai](#)"

Welcome to Your iALM.ai Site!

Before a project manager can create a project, a product owner needs to create a product or a system. Projects in iALM.ai are created to implement features for a product or a system. You can have as many projects as you wish for a given product or a system, each project delivering a set of features for the product or the system. Those projects can run sequentially or concurrently. You can also have as many products as you want on a iALM.ai site.



Let's get you set up



Create Your First Product

Define your first product, add features to product backlog, and let project managers create projects to deliver product features



Connect to Azure DevOps

Connect to your Organizations/Projects on ADO: This will allow you use iALM.ai features on your Azure DevOps projects



Connect to Jira Cloud

Connect to your Projects on Jira Cloud: This will allow you use iALM.ai features on your JIRA Cloud projects.

- a. Login as a Product Owner.
- b. Since you do not have a product defined yet, you will see the screen above to create your first product. You have three ways by which you create your first product:
 - i. You can create your product directly by clicking "Create Your First Product", enter product name and description, and click save.
 - ii. Connect your iALM.ai site to your Jira Cloud account. You will need to enter your Jira account credentials. iALM.ai will use the name of your Jira site as your first product name and will



allow you to synchronize your projects under your Jira with your iALM.ai site.

- iii. Connect your iALM.ai site to your ADO account. You will need to enter your ADO account credentials. You can then synchronize any of the organizations you have in your ADO account as products in iALM.ai. You will then be able to synchronize any project under the ADO organization with projects under your product in iALM.ai.

3. Creating a Project under a Product or a System (Product Owner)

Under the current architecture, creating projects requires Product owner privilege. If you want a specific project manager to be able to create projects, then the site admin needs to give him or her product owner privilege.

Once you have created a product or a system, you can now create a project under that product. You can create as many projects as you wish for a given product or a system. A Project delivers features for that product or system.

- a. From the list of products on the left, select the product for which you want to create a project
- b. Click on "Create New Project" under the Product
- c. Enter project name, description, start and end dates, and project manager name.

* Project Name
Ticket Counter

Description

* Project Start Date 01/30/2026

* Project End Date 03/31/2026

Project Manager Samuel Hanna

This project will use Agile Methodology Non-Agile Methodology

Sprints

Cancel

Number	Description	Anticipated Start Date	Anticipated End Date	Actual Start Date	Actual End Date
1		02/02/2026	02/09/2026		
TBD	This is the default sprint and cannot be edited or removed.				

- d. You will need to decide whether your project is going to use Agile or non-agile methodology, and your project will be configured accordingly.
- e. If you choose Agile methodology, iALM.ai will create your first sprint "TBD". All features/user stories added to the project will be scheduled by default to this TBD sprint. You can later change a feature/user story to be scheduled for any specific sprint within the project.
- f. You may add more sprints to your project and their anticipated start and end dates. If you plan to have all features/user stories in the project implemented in one sprint, then you need to add only one sprint.
- g. Click save, wait for the project database to be created. You will see your project appearing on the right-hand side of the screen when you select the product from the left side of the screen.

4. Adding Features to your Project (project Manager)

This task can be performed any time after you have created a project. A feature in IALM.ai is either a User Story (if your project is set up to use an agile methodology) or a requirement (if your project is set up to use a non-agile methodology). In fact, a project can have a mix of requirements and user stories, and they are treated seamlessly. This seamlessness has been provided by design to give flexibility when a requirement cannot be phrased as a user story. Examples are requirements that do not necessarily involve a user.

You can add features to your project in several ways depending on your project management work style.

4.1 Adding features from the Requirements or User Story screen

This is the default way to add requirements or User Stories to your project. IALM.ai uses the same screen for requirements (if your project uses a non-agile methodology) and user stories (if your project uses an agile methodology). You get to the Requirement/User Story Screen from the left menu.

Since requirements and user stories are managed and displayed in a tree structure (parent and child), to add a requirement or a user story, you can add it either as a child or as a sibling of the current requirement or a user story.

Requirements and User Stories in iALM.ai are also categorized under "Categories". Two Categories are always present by default, Functional and Quality. You can always add other categories from the left menu, Project → Configure Project Entities → Add User Story Category. (See screen below)

To add a requirement or a user story:

1. Select User Stories or Requirements from the left menu. This will display the user story/requirement tree on the right with user stories/requirements grouped by categories.
2. You can create a new user story or requirement in two ways:
 - a. Select the category you want to create a user story or a requirement for and click on "Add Child". This will create a new user story or a requirement under this category.
 - b. You can add a user story or a requirement as a child or as a sibling of an existing requirement by clicking on the 3 dots next to any user story or requirement and clicking on the appropriate option. See screen image below.

The screenshot shows the iALM.ai interface for managing User Stories. At the top, there is a breadcrumb trail: Products / iALM Platform / Release 10.3 Agile. Below this, the 'User Stories' section is visible, including a search bar and view toggles for List View and Tree View. A table of user stories is displayed with columns for Name, Priority, Status, Release, Sprint, and Scenarios. A context menu is open over the first row, showing options: Add sibling, Add child user story, Change Parent, and Delete. The table contains the following data:

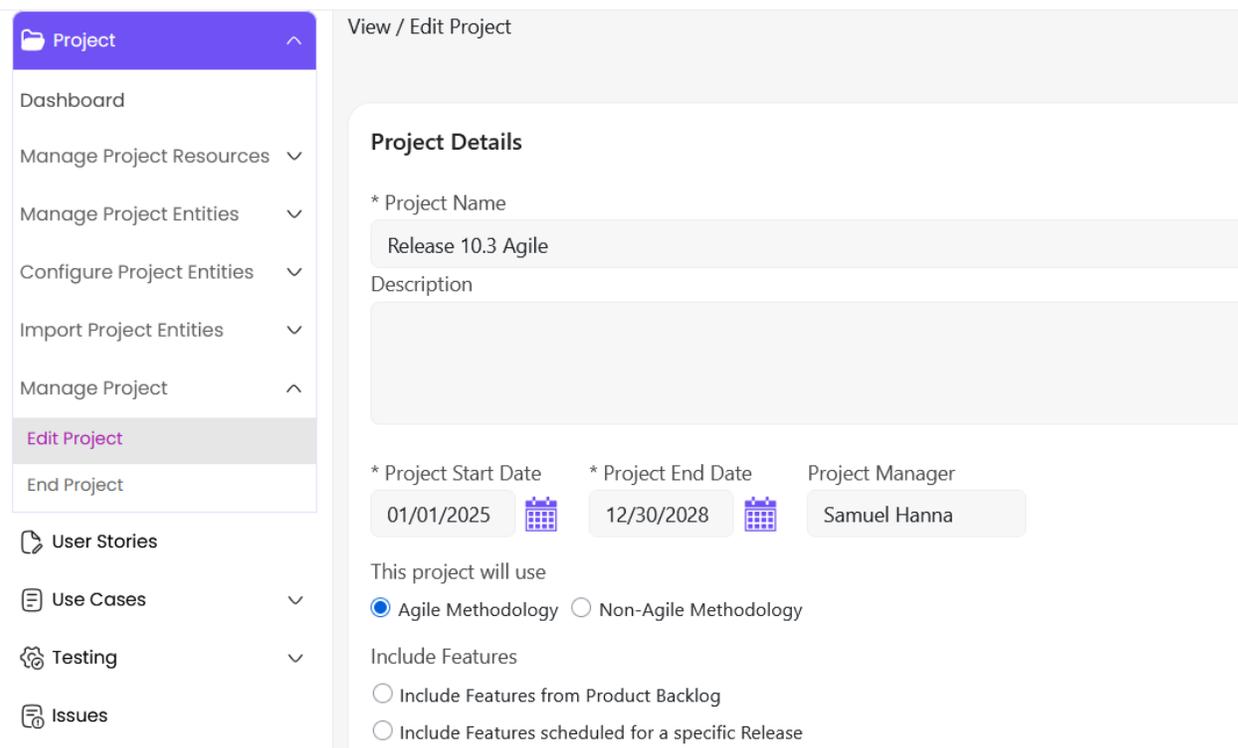
Name	Priority	Status	Release	Sprint	Scenarios
11 [00015]: Issue report dashboard [V1]	Critical	Implemented	12.3.12xx		
12 [00015]: On-screen Displays for Current Release Only [V1]	Critical	Under Negotiati...	12.3.12xx		
13 [00017]: Editing Object attributes in a tabular form [V1]	Critical	Under Negotiati...	12.3.12xx		
14 [00018]: Make links available in exported Requirement Test Coverage Report [V1]	High	Under Negotiati...	12.3.12xx	1	1
15 [00019]: Modify all links in all reports to open popup window [V1]	High	Under Negotiati...	12.3.12xx	1	28
16 [00030]: Test Requirement 1 [V1]	High	Baselined	TBD	TBD	8
17 [00032]: This is my main requirement [V1]	High	Backlog	TBD	TBD	5
18 [00033]: Requirement to Code Modules Report [V1]	Critical	Implemented	15.2	1	0
19 [00037]: As a customer I want to check the status of my order online [V1]	Critical	Backlog	TBD	TBD	5

Below the table, there is a left-hand menu with categories: Quality, Usability Req, Hardware Requirement, Implementation Constraints, and FDA Regulations.

4.2 Adding features from Product Backlog or for a Specific Release

In some cases, you may wish to add features from your product backlog, or you may wish to add features that have been scheduled for a specific release. You can do that by following the following steps:

- Click on "Project" from the left menu
- Click on "Manage Project" then "Edit Project" – The project Details screen will be displayed (see below)
- Select either "Include Features from Product Backlog" or "Include features Scheduled for a Specific Release"



The screenshot displays the 'View / Edit Project' interface. On the left, a navigation menu is visible with the 'Project' folder expanded, showing options like 'Dashboard', 'Manage Project Resources', 'Manage Project Entities', 'Configure Project Entities', 'Import Project Entities', 'Manage Project', 'Edit Project' (highlighted), and 'End Project'. Below this are other menu items: 'User Stories', 'Use Cases', 'Testing', and 'Issues'. The main content area is titled 'View / Edit Project' and contains the following fields:

- Project Details**
- * Project Name**: Release 10.3 Agile
- Description**: (Empty text area)
- * Project Start Date**: 01/01/2025
- * Project End Date**: 12/30/2028
- Project Manager**: Samuel Hanna
- This project will use**: Agile Methodology Non-Agile Methodology
- Include Features**: Include Features from Product Backlog Include Features scheduled for a specific Release

- If you select the first option, you will see a list of all features currently in the Product Backlog that have not yet been included in any project. Select whichever features you wish to include and click on "Include". Then close the Product Backlog window.
- If you select the second option, you will see a popup with a dropdown list of all releases. Select a specific release and you will see a list of all

features that the release manager planned for that release and have not been included in any project (see below). Select whichever features you wish to include in the project and click "Include". Then close the popup.

Include Features scheduled for a specific Release Include Close

* Release

iALM Platform Backlog

- 00011: Positive and Negative Scenarios (Assigned Release: 1.3)
- 00013: deactivate user needs to send an email to the user who was deactivated (Assigned Release: 1.3)
- 00017: Clicking on Pie to display details (Assigned Release: 1.3)
- 00019: Integration with MS Project to import/export tasks (Assigned Release: 1.3)
- 00069: Audit trail (Assigned Release: 1.3)

5. Assigning Team Members to a Project:

- Login as a Project Manager.
- From the left click on a product that has been created before. Now you will see on the right side all projects associated with that product.
- To access a project, click on the name of the project. The Project Dashboard will be displayed.
- From the left menu, select "Manage Project Resources" then select "Project Team"
- Users who have been created for your site will be displayed on the left-hand side (See below). Simply select users whom you would like to have in your project team and move them to the right to assign them to the project.

- f. You can now assign Access Privileges for a team member with respect to each type of project entities by clicking on down arrow labeled "Access Privileges". By default, all team members have "Read" access to all project entities.

Project Users Access Rights

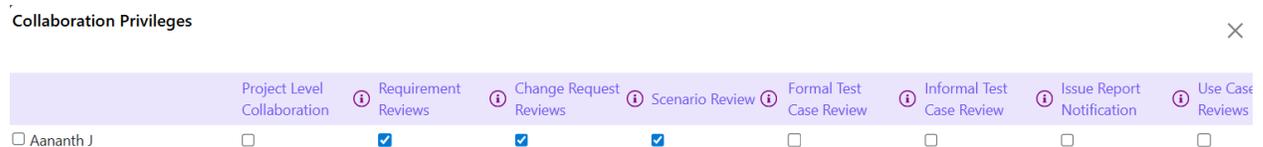
Search here..

Ajay Kumar (ajay.kumar@RommanaTest.com)

Assigned Work Access Privileges ▾ *Role Developer

Access Privileges	Read	Create / Edit	Delete
<input type="checkbox"/> Select / De-Select All			
Actions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Request	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents and Models	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formal Test Cases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Functional Components	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Informal Test Cases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
List Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Story Categories	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User Stories	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- g. You can assign Collaboration Privileges to a team member with respect to different collaboration activities by clicking on "Collaboration Privileges" on the upper right corner. You will see the screen below.
- h. Make sure to scroll to the right and click save. When you return to the main screen, make sure to click save again to save the team assignment.



6. Configure Project Dashboard (Optional)

The Project Dashboard will give quick reports and charts about a project. You can perform this task any time during the project, especially after you have created some data in the project.

- a. Login as a Project Manager
- b. Select any product from the Portfolio screen
- c. Open a project from the right by clicking on the project name
- d. Select the "Project Dashboard" tab. If you have a project already open, you can access the same tab by clicking "Project" on the top menu
- e. Click "Configure Dashboard" to add and remove items to your project dashboard. Notice that charts always added to the center of the dashboard and tables can be added to the right or the left of the dashboard.