

# Customer Success Onboarding Guide



Hello and Welcome to the SmartBear family!

SmartBear has put a major focus on Customer Success to ensure our customers are able to maximize the return on their investment in their SmartBear products.

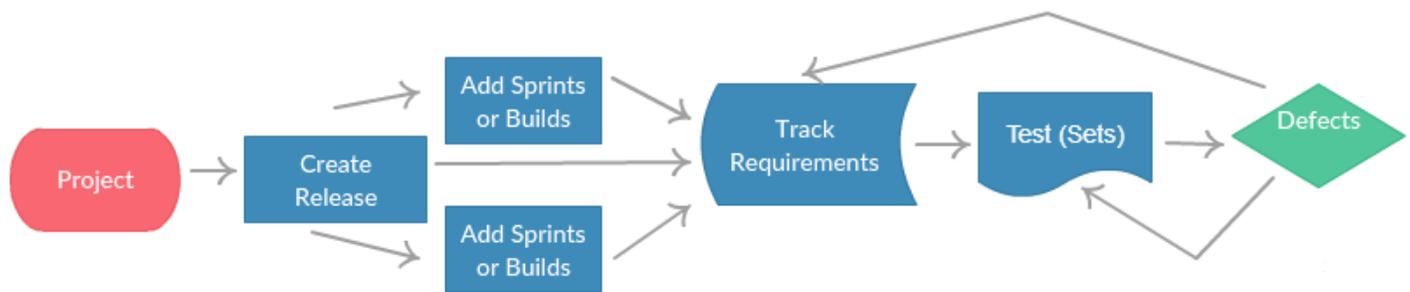
This document is your On Boarding Guide, and go to reference for all training needs. Our goal is to help you plot you and your teams learning stages from beginner to advance within QAComplete. We are here to assist in your project benchmarks and challenges along the way.

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## Test Management Life Cycle

- Hierarchy – The Release should include all sprints that need to be finished in order to release the product to a customer. Based on the speed of the team, there could be more sprints per release, and also more builds per each sprint.
- Traceability – Requirements should be linked to a release or sprint, a release or sprint to the respective test and the test to the defects. This will ensure the smoothest possible workflow for each member of a development team because of the transparency this allows. However, you and your team can link these as you see fit with QAComplete.



- Start with creating a Release, items can automatically be linked to the Release or Sprint.
  - Track your feature requests with Requirements and link to your Release or Sprint.
  - Link Test to your Requirements to document Test Coverage
  - Tests are organized into Test Sets where your team can run tests.
  - Defects generated during a run is linked to failed Test, Test Set, Requirements, and Release
- Tying it all together you can create, customize, and analyze Reports and Dashboards for visibility and insight of your Releases, Defects, etc.

## System Requirements and Administrator Set up

### On-Premise:

- Requires your own hardware.
- Requires management by your own IT team.
- You can use LDAP.
- Updates are scheduled approximately quarterly (Requires your own resources perform the update).
- Browser Support and Screen Resolution (Detailed below).

### Software as a Service solution:

- Updates are seamless and regularly scheduled, requiring no effort on your part.
- Browser Support - Recommended browsers for QAComplete Release 10.1 and above:
  - Firefox
  - IE 9, 10, 11 or Edge
  - Chrome
- Screen Resolution - We recommend a screen resolution of 1280 by 1024 or greater.

### [Create Security Groups and Users](#)

- QAComplete security model allows you to fully control your team member's permission to your data. Once you create a security group, you can then determine what rights people in that group have to QAComplete modules and data. For example: you may want one team to have read-only permission to Requirements, but full access to Defects and Test Management.

**For more assistance, visit the QAComplete Product Hub and view topics under [Installation and Getting Started](#).**

## Beginner QAComplete Learning Stages

### Beginner Knowledge Topics:

#### ➤ Releases

- Organize your data by Release, Iteration, and/or Build with Releases module.
- After creating first Release add Sprints or Iterations to it.

#### ➤ Requirements

- Track your feature requests and enhancements with the Requirements module. Here, you can document, estimate and approve features and then link them to your Release or Sprint. You can edit, search, and filter from the list of Requirements.

#### ➤ Tests

- Test Management provides full traceability to ensure complete test coverage of your Requirements and retesting of your Defects. Tests are organized into Test Sets, where your team can run the Tests in a consistent, logical order. Tests Sets can be linked to Configurations, so you can track environment details for each run, such as browsers or operating systems.

#### ➤ Defects

- Defects can be added the same way you added Requirements or Tests, or they can be automatically generated as your team runs manual Test Sets and fails Tests. If the Defect is automatically generated during a run, it is also automatically linked to the failed Test, Test Set and Release / Iteration.

### As a Beginner you should be familiar with the following actions within QAComplete Modules:

- Creating Releases, Requirements, Tests, Defects
- Manual Test and Test Set definition and Execution
- Linking items for traceability
- Running prebuilt and ad hoc reports
- Configuring Users and Security Groups

## Advanced QAComplete Learning Stages

### Creating Custom Fields and Forms:

- Each area allows you to create custom fields. Custom fields allow you to track any additional data that you want to collect.
- You can create custom fields for each module. Custom fields can be defined as text, choice lists, checkboxes, dates, or numeric.
- You decide what fields appear in what order on the Add / Edit form, what fields are required, and what fields might need default values in Setup under Screen Layouts.

**Custom Fields**

Custom fields allow you to add new fields to the screen. The first 10 custom fields have a maximum field size of 8,000 characters each while the remaining custom fields have a maximum field size of 100 characters.

[Return to Entry Edit Screen](#)

Field Number	Delete?	Field Name	Field Type	Field Size
1	<input checked="" type="checkbox"/>	Product	Choice List (List of Values)	100
			Other Address Database Professional All Products App Generator Atrium	
			<input type="checkbox"/> Sort alphabetically	
2	<input checked="" type="checkbox"/>	Recommended Tests	Text	2000
3	<input checked="" type="checkbox"/>	Support Ticket Email	Text	50
4	<input checked="" type="checkbox"/>	Support Ticket Name	Text	50
5	<input checked="" type="checkbox"/>	Support Ticket Company	Text	75
6	<input checked="" type="checkbox"/>	Busy	Check Box	3
7	<input checked="" type="checkbox"/>	Hours Spent	Numeric	20
8	<input checked="" type="checkbox"/>	Code Changes	Text	500
9	<input checked="" type="checkbox"/>	Notify Client when Fixed	Check Box	3

### Creating Custom Workflows:

- With Workflow, you can set rules about how items can move from one status to another, what data items are collected along the way, and set rules for automatically assigning items to specific team members depending on what status they transition to.
- From any Listing, click the Actions drop down and select Workflow
  - From an Edit form, click Choice Lists, then click Workflow and State Transitions
  - From Setup, go to System Configuration -> Screen Layouts. Select any module and then click Workflow and State Transitions.

## Advanced QAComplete Learning Stages Continued

### Using Escalation Rules (email alerts)

- Escalation rules allow you to escalate the priority, assignment and other information for requirements, tests, defects, contacts, and tasks once specific criteria is met.
- For example, you might consider creating an escalation rule that is invoked when an active defect is assigned but not updated for 2 days. When the rule is triggered, it can automatically send an email to the owner, assignee, or specific people on your team.

### Using Automated Tests & Supported Automated Testing Tools

- Test Management's Automation feature allows you to run tests with little to no human interaction. You can perform testing from remote computers as often as needed.
- By using the QAComplete integration with various tools, you can fully track tests and test results across Test Management's manual and automated tests. You can run automated tests from the desired computers and post results for full tracking of your testing coverage and progress.

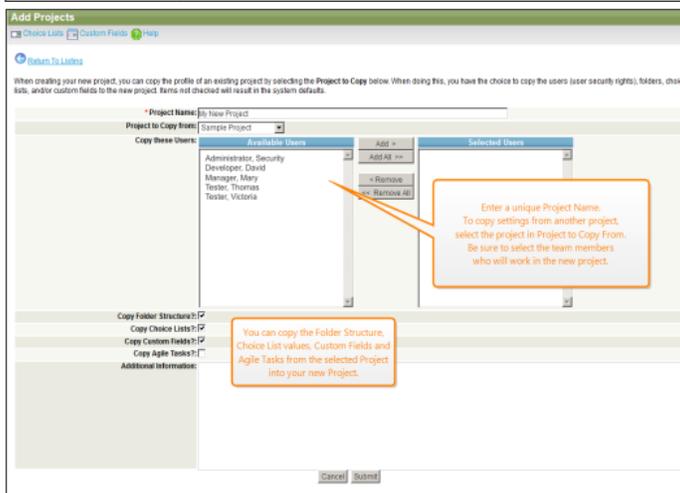
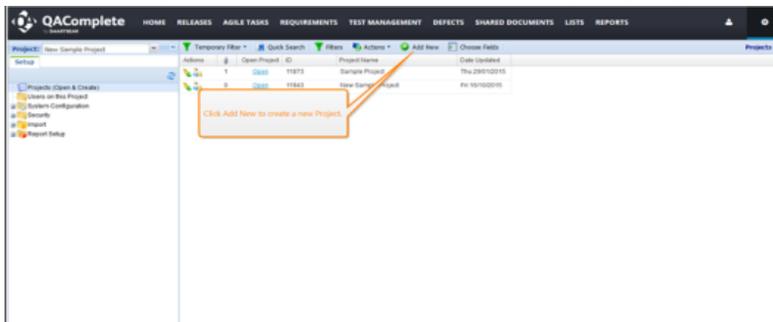
### Test Management Charts and Dashboards

- You can customize dashboards to view what is important to you for viewing on home page.
- To view test dashboards, go to HOME > Dashboards page from here you can add tests and test sets.
- To add a chart to your dashboard page, click ADD DASHBOARD CHARTS. The available charts appear on the right. Drag your selections onto your dashboard page.
- To remove a dashboard chart, click the Menu icon on the chart, and click the Delete icon.
- To change the selected Release or Folder, click the Menu icon on the chart and click the Filter icon.

## Advanced QAComplete Learning Stages Continued

### Setting up Multiple Projects

- If you have different departments or teams within your organization that will work with the features in a different way, such as different custom fields, workflow, screen layouts and/or choice list values, you may want to define more than one project.
- You may also prefer to use multiple projects to secure the data so that some teams can access certain projects and features but not others. For example, if you have multiple departments and you do not want one department to see another department's information, you can accomplish this by using multiple projects and setting security to prevent unauthorized project access, or you may have a team that needs read-only access to one project but update and delete in another.
- You can separate your data into multiple projects for business reasons as well.



## Learning and Training References

### **Free Training and Support**

#### [QAComplete Product Hub](#)



This page will be your one stop shop for support resources for all QAComplete. Go here for best practices, videos, to connect with other users, and more. Please select the icon to go there now.

### **SmartBear Academy – Free to all Customers**

- 101 Getting Started Session and 201 Advanced Level Topics held Quarterly to help get you and your team up and running with QAComplete. Starting Q4 we will add 301 training on Hidden Gems and Customer Use Case examples.  
*Ask your Customer Success Advisor for more details to sign up for these sessions.*

### **Partner Training Services**

- QAComplete Quick Start Training Session \$499/company
  - Unlimited Users. QAComplete setup and training, full tour of the product covering all modules. 2 hours' covers feature and functionalities for successfully getting started.
- QAComplete Test Management Overview Seminar starting at \$5,719
  - QAComplete Overview for End Users; Release Management, Requirements, Test. Case Management, Defect Management, Key Reports & Best Practices (Up to 15 participants).
- QAComplete Migration Services
  - Lite and Standard Version starting at \$23,919
  - Migrate up to 50,000 entity records (Requirements, Test Sets, Defects).
  - Project Setup, User Configuration, Security Group Setup.

*Ask your Customer Success Advisor for more details on purchasing these services.*

## QAComplete Tips and Best Practices

### 1. Prioritize, Review, and Record Tests

- This helps keep your testing activities focused.
- Raising visibility of complex user interaction that may not have been thought through.
- Designing detailed steps that can be scripted for automation.
- Understanding of the feature and getting feedback from the team that this is the expected behavior.
- Useful when your initial tests have failed and you want to verify a bug fix in a later build.

### 2. Update Items in bulk

- Fast Edit feature lets you update multiple records at once. Copy, clone, move, and delete Defects for later traceability reporting.
- For example, if Tests are assigned to a user that moves roles, update set of Tests to a new contact with Fast Edit.
- Allows you to filter and search, and move items from one Project to another.

### 3. Linked items

- Link a Test to any Release, Requirements, or Defects for later traceability reporting.
- Access on Edit form for any item, or from Actions drop down on the List of items.
- Gives traceability, and allows you to understand if the Requirement was met and all tests passed. Customize to fit your needs.

### 4. **Customize QAComplete to your needs**

- Add fields, change values to existing fields such as Status to capture all the data you need. All modules allow you to customize.
- With Workflow you can set rules about how items can move from one status to another.
- Workflow and State Transitions assigned transit status for next status, and custom fields shown on the screen for each status.
  - From any Listing, click the Actions drop down and select Workflow
  - From an Edit form, click Choice Lists, then click Workflow and State Transitions
  - From Setup, go to System Configuration -> Screen Layouts. Select any module and then click Workflow and State Transition.

## QAComplete Getting Started Videos

### Two Part Series on Getting Started with QAComplete:

[Getting Started Part 1](#) - Learn how to Create Security Groups, add Users, and assign permissions.

[Getting Started Part 2](#) - Learn how to create a Release, Sprints, assign Requirements, complete Test coverage, and add Defects in QAComplete.