



Quick Start Guide: QAComplete

This quick start guide provides an overview of the steps to get you going with SmartBear Software's
QAComplete

Getting Started with QAComplete

QAComplete is a full Test Management system to aid you in documenting, organizing and tracking your development and testing cycle. QAComplete includes modules to track Requirements, Tasks, Test Management and Defect tracking. The List Manager provides further customization, where you can configure Lists tables to hold additional information.

New trials include a Sample Project as an example of how you could organize your data. Use the Sample Project to get familiar with the process and to help determine how best to organize the system to suit your specific business needs.

To get started with QAComplete, your system administrator will do the following:

System Administrator Steps

Create Security Groups

QAComplete's security model allows you to fully control your team members 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.

To create a security group:

1. Go to **Setup > Security > Security Groups**.
2. Click Add New.
3. Name the security group (such as "Developers" or "Test Team") and click Submit.
4. The new group appears on the list of Security Groups. Click the  **Manage Security Rights** icon next to the group.
5. Use the check boxes to grant or remove permission for this group.

Add Users

Now that you have defined your Security Groups, you are ready to add users and put them in the desired group.

1. Go to **Setup > Security > Users**.
2. Click **Add New**.
3. Enter the user's information (Name, Email, etc.)
4. Select the desired Security Group for the user and click **Submit**. The user will be granted permission to the active Project.

Your new users automatically get an email with login details.

Create a Project

Projects allow you to fully control what permissions your users have to specific data. Grant permission to a Project by assigning a user to a Security Group for that project. Also, QAComplete comes with a Sample Project that your team can use to explore the application. If you select the Sample Project as you add users, the new users automatically have permission to use it.

1. Go to **Setup > Projects (Open & Create)**.
2. Click **Add New**.
3. Enter a Project Name and click Submit.
4. Once created, you can grant users permission from the Manage Security Rights icon on the list of Projects.

To grant users permission to Projects:

1. Go to **Setup > Projects (Open & Create)**.
2. Click the  **Manage Security Rights** icon next to the Project.
3. Use the drop down list of **Security Groups** to assign your team members specific permission to the selected Project.

Once you have your login credentials from your Security Administrator, you can log in to QAComplete and start creating your data.

QAComplete comes with a Sample Project with some example data for you to explore. Your Security Administrator can grant you permission to the Sample Project or any other Projects that your team creates.

Select a Project

Select a Project from the left side navigation panel on any of the main tabs (for example, Releases, Agile Tasks, Requirements and so on). If you cannot see the left side navigation panel, click the double chevron  on the left to open the panel. Use the drop down list of Projects to select the Sample Project or other Project that you have access to.

Create your Data

You can navigate through the tabs in any order to create your data. If you start with creating a Release, items can automatically be linked to the Release or Sprint by simply selecting the desired Release in the left side navigation panel - as you add items, they are linked to the selected Release. You can organize your data into Folders, create Custom Fields, and link related items together with Traceability.

Releases

Organize your data by Release, Iteration and/or Build with the Releases module.

To start creating Releases:

1. Select the **Releases** tab.
2. In the left side navigation, select the Folders tab and click **Add**.
3. Enter a name for your first Release Folder (such as "My Application") and **Submit**.
4. Highlight the folder in the left, and in the right panel, click **Add New**.
5. Give your release a name and date range and **Submit**. If you want the dates to be calculated from sprints below the release, check the **Auto Adjust Est Dates** box.

After creating your first Release, you can add Sprints or Iterations to it.

1. In the left navigation panel, highlight the desired **Release**.
2. In the right, click **Add New**.
3. Choose if you want to add an **Iteration** (Sprint) or a **Build** (typically you would add the Build to the Iteration or Sprint).
4. Fill out the name, status, and estimated dates.
5. Click **Submit**.

Track 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.

1. Select the **Requirements** tab.
2. Click **Add New**.
3. Enter the details for your first Requirement and click **Submit** or **Submit/Add another** to continue adding Requirements..

To manage the appearance of Requirements, go to Setup > System Configuration > Screen Layouts and select Requirements. Here, you can design the order of the appearance of fields on the add / edit form, manage workflow and custom fields.

See [Requirements Overview](#) video.

Track Tests

Test Management provides full traceability to can 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.

First, create your Tests:

1. Select the **Test Management** tab.
2. Select **Test Library**. This is where you define your re-usable tests.
3. Click **Add New**.
4. Complete your Test description and other details and **Submit**.
5. Define your test steps and expected results and click **Save and Exit** or **Save/Add another**. Continue defining your test cases.

Next, define your Test Sets:

1. Select the **Test Management** tab.
2. Select **Test Sets**.
3. Click **Add New**.
4. Complete your Test Set description and other details and **Submit**.
5. The Tests tab opens. Use the right side panel to filter for your tests and click **Go**.
6. Drag **Tests** into the **Test Set**, and arrange them in the desired order.
7. Click **Save and Exit**.
8. Click **Add New** to continue defining Test Sets.

Now your team is ready to run the Test Sets and post the results. If a Test in the run fails (any step within the test is marked Failed), you will have the opportunity to automatically create an associated Defect.

To manage the appearance of Tests or Test Sets, go to Setup > System Configuration > Screen Layouts and select Tests or Test Sets. requirements. Here, you can design the order of the appearance of fields on the add / edit form, and manage custom fields.

For working with automated tests, please see [Test Automation Integration with Test Management](#). Also see the [Test Management](#) video.

Defects (Bugs)

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 Defects is automatically generated during a run, it is also automatically linked to the failed Test, Test Set and Release / Iteration.

To add a Defect:

1. Select the **Defects** tab.
2. Click **Add New**.
3. Define the Defect details, including description and steps to reproduce.
4. Use **Link to Items** at the bottom of the form to link the Defect to an existing Test.
5. Click **Submit** or **Submit/Add another** and continue adding your Defects.

To manage the appearance of Defects, go to Setup > System Configuration > Screen Layouts and select Defects. Here, you can design the order of the appearance of fields on the add / edit form, manage workflow and custom fields.

See the [Defect Management](#) video.

Traceability

Use Traceability to link related items together.

To view linked items:

1. From any module, click the **Actions** drop down.
2. Check the **Show Traceability** box.

The list now shows the count of various linked items. Click on the links to drill into the linked items. Alternately, you can open the item in Edit mode and scroll to the bottom to see the link items.

See the [Requirements Traceability](#) video for examples.

Reports

The Reports tab provides ad-hoc detail and summary reports in a spreadsheet like format. Additional built-in reports are grouped by module.

FAQs

What do we do with a closed Release? You don't want to get rid of the history of a Release, but you can mark it "Inactive" so that it is out of the way. The navigation panel for each module allows you to view or hide Inactive Releases.

Can I archive other data? You can move data out of the way using Folders. Put the data into a folder, then make the folder Inactive. The folder and all the data in it are moved down to the bottom of the

navigation panel, out of the way. You can get back to the data by simply making the folder Active again.

Can we import data? Yes, you can import data from a flatCSV file. Go to the desired module, click the Actions drop down and select Import from CSV file and follow the import wizard. You can also get to the import wizard from Setup.

Can we export data? Yes, you can export your data into a flat CSV file. Go to the desired module, click the Actions drop down and select Export (visible fields) or Export (all fields). Export (visible fields) exports only the columns you've selected on the list.

Can we attach documents and images? Yes. Open the item in question, click the Files tab and click Add New. Navigate to the document and upload it.

Can we add comments or notes? Yes. Open the item in question, click the Notes tab and click Add New. You'll see a new text box open up where you can make your comments.

Can we create our own values for the list of Statuses? Yes, all choice lists are customizable. Go to the desired module, click the Actions drop down and select Choice Lists. You can add or change the values for any drop down list to suit your needs.

Do you keep an audit trail of changes? Yes. Each item has a History tab where you can see when changes were made, what the changes was, and who performed the action. The Test Library also has a Version function that saves complete versions of tests as they are changed.

Can we create our own custom fields? Yes. From the desired module, click the Actions drop down and select Custom Fields. You can create up to 90 different custom fields for each module. You can also access Custom Fields from Setup > Screen Layouts.

How do I locate specific items? You can use Quick Search or create a Filter in any module to find the desired items. Click Quick Search, enter a phrase, and select the field to search and then Submit. Click Filters, give your filter a name, then use the drop downs to select the Fields, Conditions and Values to use in the search, then click Submit.

Can I sort and modify the list of items? Select the module, then click the header of a column to sort ascending or descending order. To sort by multiple columns, click the Actions drop down and select Sort. You can change the columns and order of the columns by clicking the Choose Fields button. The system will "remember" your selections the next time you log in and go to the same tab.

For More Information

Visit our [Community Forums](#), peruse the [User Guide](#), and check out additional [videos](#) on the [SmartBear Software website](#).