

Welcome to Applause!

We want to make sure you're well prepared to get the most out of working with us. To that end, we've put together a pre-launch checklist and a getting started guide that will walk you through your next steps, introduce you to key features and functions and answer any initial questions.

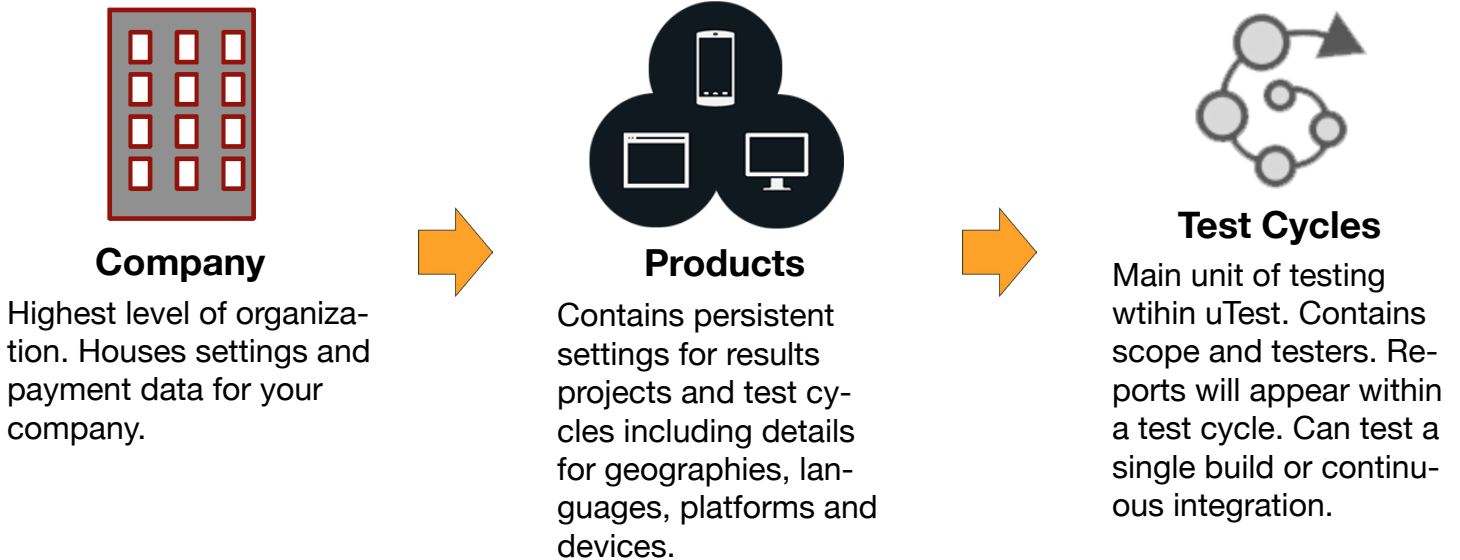
If nothing else, the most important thing to remember is: if you run into a question or a problem that you can't solve, *Contact your PM!* Your success is their mission, and they offer valuable tips and best practices.

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Testing Services Platform Organization

You can access the Applause platform at <http://my.applause.com>. The platform is organized as follows:



Bug Tracking Integration

The Applause platform integrates with the following bug tracking systems:

JIRA | Bugzilla | MANTIS | Microsoft TFS | Pivotal Tracker | Rally | Redmine

You can create an integration when you setup your first product. For more information on how to integrate with your particular system, visit: <http://help.applause.com/>

Test Cycle Timeline

Prior to your first test cycle, you will have a kick-off call with your Project Manager (PM) to discuss background, testing goals, strategies, measures of success and more. While the length of your test cycles will vary based on your needs, it will typically follow the following general pattern.



Monitoring A Test Cycle

You have the ability to monitor and adjust a test cycle as needed by refocusing scope, communicating with testers or even identifying supplemental testers for the test cycle. You can monitor the test cycle progress at any time and are encouraged to triage bugs in real time. Depending on your service level your PM and/or Test Team Lead (TTL) will assist you with these functions.

Communicating During a Testing Cycle

With Applause, your testing team works in real time. With real-time chat, you can communicate with them just like your inhouse team. Use the chat functionality on the right-hand side of the platform to monitor and chat with your entire testing team, PM and TTL simultaneously. You can access chat functionality on the right-hand side of the platform.

If you have a question about a specific bug, you can use the Request More Information functionality directly within the bug report to ask a question. The conversation will live in the bug report.

You can also read and write notes only visible by your TTL and PM in the Customer Notes box.

Bug Triaging

Reviewing and rating your testing results is easy and a very important aspect of maintaining the quality of the Applause community. As with any community, some testers are better than others, and we want reward those testers who consistently create good results while reducing the contributions of testers who produce poor results. We rate the testers in our community by measuring the value of each tester’s approved and rejected bugs. The value you assign affects both a tester’s rating and their incentives.

There are three values that you can assign to a bug that you approve:

Exceptionally Valuable

These are your mission critical, show-stopping high impact bugs. They can be bugs that you “drop everything” to fix, or ones that are complex and may require intensive resources.

Very Valuable

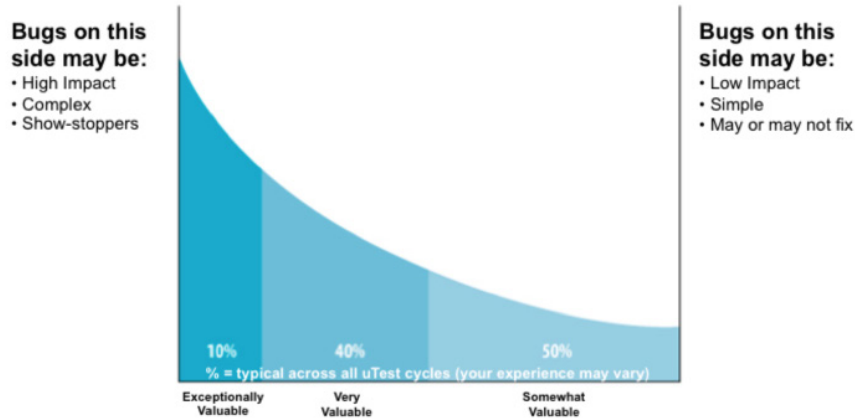
These are your “should fix” bugs. Very Valuable bugs are important, but perhaps not essential, that may be able to wait for a future build to fix.

Somewhat Valuable

These are less important bugs. They are typically low impact bugs that you may or may not fix, depending on priority and workload.

Note: You can also Reject bugs if they are out of scope, duplicative, or a tester did not follow directions.

Rating Your Bugs



Post Cycle Review and Next Steps

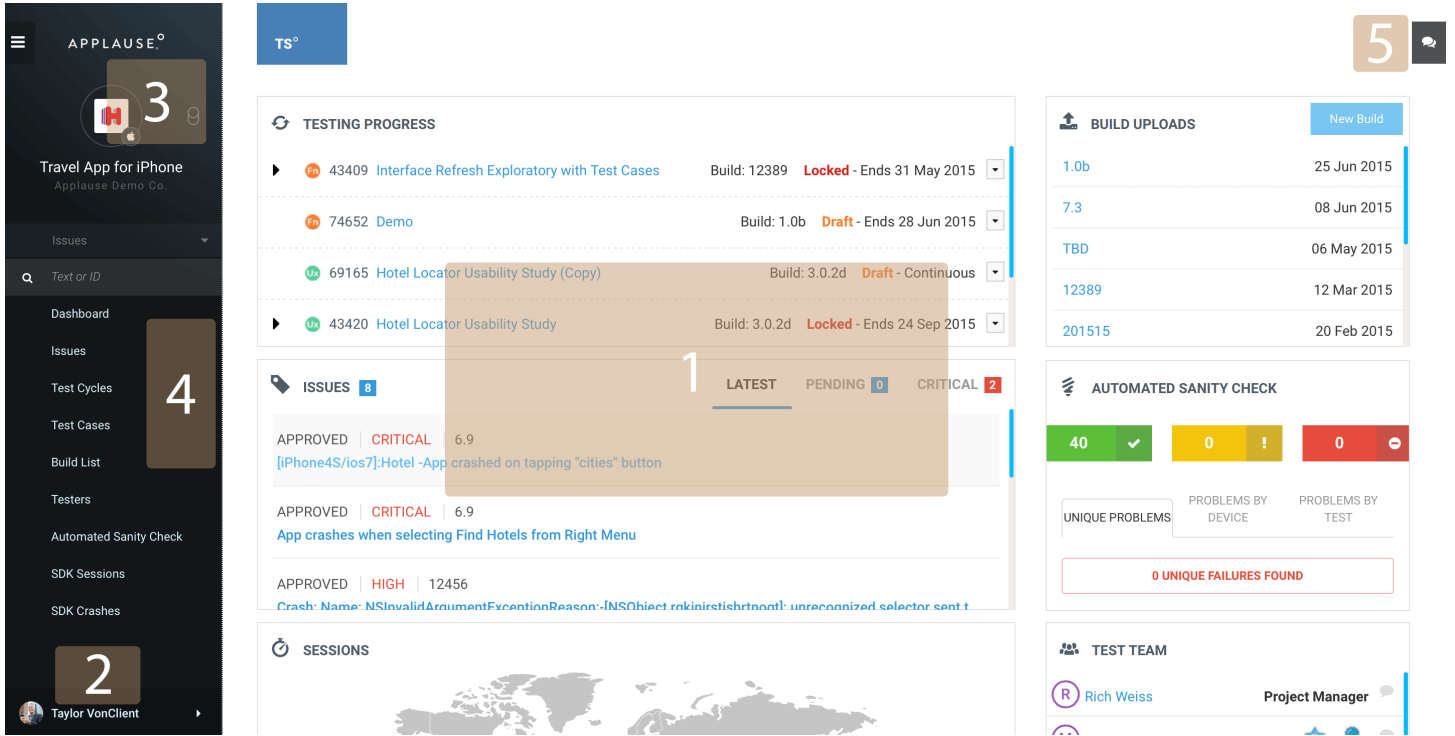
Your test cycle will lock at its assigned end time, preventing further bugs from submission, or earlier if determined by you or your PM to be necessary. For continuous test cycles, you can upload a new build whenever it is ready. Unresolved bugs will carry over to your next build as known issues/reported defects. For single-build test cycles you may close your test cycle after you have triaged all of the bugs. If you are interested in replicating a new test cycle with a similar structure to your previous one, create a copy of a test cycle.

After completing your first test cycle, you and your team will meet with your PM and TTL to discuss lessons learned and identify areas for improvement. Here, you may identify preferred testers and lay the groundwork for the next test cycle and will help ensure future cycles are as productive as possible.

Pre-Launch Checklist

- Create new account and acknowledge Terms & Conditions (*Note: Only one person should do this. They will then add additional users after sign up.*)
- Create your first product with help from your PM
- Add new, initial team members
- New Test Cycle creation
 - Request test cycle template from PM
 - Customize test cycle template
 - Create new test cycle with template
 - Make sure to add known bugs from your bug tracking system
- New Test Case creation
 - Create new test case in-platform or via template upload
 - Have your PM review your test case(s) prior to activation
- Contact PM for test team selection and launch

Dashboard Overview



1) Main dashboard view: Made up of modules that offer management, reporting, and integration options with Applause’s testing services and the Applause SDK.

2) Clicking on your name will bring up a number of options:

User Management: Add new team members and manage teams

Billing: View billing history and order details

Company Info: To change company name, and find contact information for your primary Project Manager (PM)

Account Info: Modify account info like name, email, and password

Account Preferences: Set notification and alert preferences

3) Product menu: Select a current project, create new projects, or view all projects.

4) Nav Bar: Click on these icons to navigate to different tabs (e.g. test cycles, test cases, etc.)

5) Show/Hide Chat Panel: Click the ‘Show/Hide Chat Panel’ button to show or hide the chat panel.

Create a New Account

If you haven't already, the first thing you'll need to do is create an account. To do so:

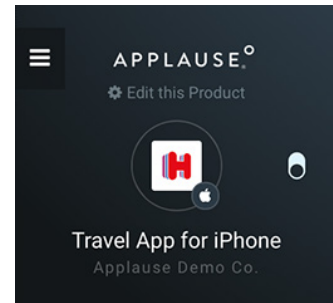
- 1) Visit: my.applause.com/u/customer/signup
- 2) Fill out the signup form
- 3) Agree to the Applause Terms of Use
- 4) Click 'Send Request'

The screenshot shows a dark-themed web form for creating a new account. At the top, the Applause logo is displayed, followed by a promotional message: "Build your software testing team today! Create your free testing account, or call us toll free at 1.844.300.2777." The form consists of several input fields: "First Name", "Last Name", "Job Title Level" (with a dropdown arrow), "Department" (with a dropdown arrow), "Number of Employees" (with a dropdown arrow), "Phone", "Company", and "Country" (with a dropdown arrow). Below these fields is a section titled "Account Details" which includes "Email" (with an envelope icon), "Password" (with a lock icon), and "Confirm Password" (with a lock icon). At the bottom of this section is a checkbox labeled "I agree to the Applause terms of use and Privacy & Security policies". A large "Send Request" button is positioned at the very bottom of the form.

Create a New Product

Creating a new product is simple. An in-platform wizard will guide you through the needed steps.

Click the product switcher, then select 'Add New Product' from the bottom of the menu:



The wizard will take you through the following steps:

1) **Product & Settings:** Enter in information about your project.

If you are creating a new product for a native mobile app, you will have the option of entering in your mobile app's App Store ID#.

Best Practice Tip: When naming your product, it is often helpful to follow the naming scheme: Product Name - Device Name. Example: "Travel App - iOS".

2) **Regions:** Allows users the ability to constrain or specify testing to only specific geographic regions if desired. By default all regions are selected.

3) **Countries:** A drill-down into regions that allows users the ability to constrain or specify geographic scope at the country level. By default all countries are selected.

4) **Languages:** Allows users the ability to constrain or specify specific language targets if desired. By default all languages are selected.

Note: Only narrow down and specify specific languages if running a localization cycle.

5) **Environments:** If testing a mobile app, select the desired OS environment (iOS, Android, Windows Phone or BlackBerry). If you are testing a website, select whether you would like testing to be run on the most popular mobile devices on the market regardless of age, or whether you would like testing to be run only on the most recent mobile devices regardless of popularity.

Note: If you are or will be using the Applause SDK, you MUST select Android or iOS to receive data via the SDK integration.

6) **Integration:** Allows users to configure integration with third party bug tracking databases. For additional information, see "Integrating With Bug Tracking System Databases" (page. 18).

Add Team Members & Teams

It is recommended that you first add your new team members, and then assign them to teams.

Team Member Management

Time to get your team on board! There are three different levels of privileges in the Applause platform:

- **Owner:** In addition to collaboration, owners can change project settings and invite other collaborators. Owners also receive all platform notifications by default.
- **Collaborator:** Allow a team member to create new test cycles, triage bugs and communicate with testers and the Project Management team. Collaborators receive limited platform notifications.
- **Viewer:** Provide read-only access to a team member. This allows people to monitor test activity, but they will not be able to create new test cycles themselves.

Adding a team member is easy. First, log into the Applause platform at: <http://my.applause.com>:

- 1) Click on your name in the lower left hand corner and select 'User Management'
- 2) Click on +New Teamate
- 3) Fill out the information fields, decide if the teammate should have admin privliages, and assign them a role.
- 4) Click 'Finish', and then repeat the 'Add New Teammate' process to add additional teammates as needed.

Team Management

Teams are not just a handy way to organize team members. Team assignments also act as view filters. Assigning team members to teams will keep projects they're not involved with from cluttering their dashboard. Note that team members unassigned to any team will be able to see all active products and related test cycle activity.

- 1) Click on:
- 2) Assign roles for team member's to add them to the team. Set role to 'None' to unassign them.
- 3) Assign the team to single or multiple products.

Create a New Test Cycle

!! IMPORTANT !!

Before creating a new test cycle, contact your PM and request a Test Cycle Template. Then, once the test cycle is created, contact your PM so test team selection can begin.

- 1) Select the Product to which the test cycle is going to be assigned from the Project Menu.
- 2) Contact your PM and request a Test Cycle Template.
 - If no test cases have yet been created for a particular project: Main Dashboard -> 'Testing Progress' module -> 'Create New Test Cycle' button.
 - If test cases have already been created for the project: Click on the 'Test Cycles' icon and a '+ New Test Cycle' button can be found in the upper right hand corner

The Test Case Wizard will launch and guide you through the rest of the process:

1) Select a Testing Type (Functional, Usability, Localization, Load and Security): A test cycle can only be associated with a single testing type.

2) Select a Test Cycle Type (Continuous or Single): A test case should be associated with a single test cycle type.

3) Product & Settings: Define the basic settings of the test cycle including name. Some things to be aware of:

- 'Add to Product': All test cycles must be assigned to a specific product, but do NOT have to be assigned to the product that is currently active.
- 'Scheduling': 'Start Date' is used as a means of notifying testers when to expect the test cycle to begin. 'End Date' however sets the date upon which the test cycle will be automatically locked.
- 'Build Number': All test cycles associated with a specific product must have unique build numbers.

4) Scope & Instructions: NOTE: You will be using and customizing the Test Cycle Template from your PM for this step! Define the test URL or attach the build associated with the test cycle (required), as well as define in scope (required) and out of scope (not required, but recommended) requirements. Additional instructions or files for testers can also be added.

5) Add Known Bugs: If any previous test cycle have been run on the project, previously found bugs can be conveniently carried forward into the new test case. Known bugs can also be exported as a .csv from a bug tracking system (like JIRA) and uploaded/attached to the test cycle.

6) Testing Coverage: Specific parameters for the test cycle can be customized independently of project settings if needed.

7) Contact PM: Finally, contact your PM so test team selection can begin.

Test Cycle Management

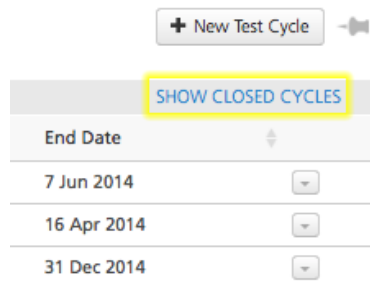
There are two different ways to manage your test cycles, from the Dashboard and from the Test Cycles tab:

The 'Testing Progress' module in the Dashboard and the 'Test Cycles' tab (found by clicking on the 'Test Cycles' icon in the left hand nav bar), both display the list of your test cycles:

| TESTING PROGRESS | |
|---|--|
| ▶ Fn 43409 Interface Refresh Exploratory with Test Cases | Build: 3.0.2d Active - Ends 31 Dec 2014 ▾ |
| ▶ Ln 44539 Simplified Chinese Localization - Spring 2014 | Build: 3.3 Active - Ends 31 Dec 2014 ▾ |
| ▶ Ux 43420 Hotel Locator Usability Study | Build: 3.0.2d Locked - Ends 16 Apr 2014 ▾ |
| ▶ Ld 44436 Demand Performance Test | Build: 3.2.4 Locked - Ends 02 May 2014 ▾ |

The following related information is also displayed:

- **Test Cycle Type:** Fn (Functional), Ux (Usability), Ld (Load), Sc (Security), or Ln (Localization)
- **Test Cycle Number**
- **Test Cycle Name:** Clicking on a test cycle name will bring you to that cycle's 'Issues' page where you can review and manage reported bugs.
- **Issues Reported This Week**
- **Crashes Recorded This Week**
- **Build Number**
- **Status:**
 - Draft:** A test cycle that has been created, but has not been activated by a PM
 - Active:** A test cycle that has been activated by a PM and is currently running
 - Locked:** A test cycle that has been 'paused', preventing additional submissions. Test cycles also automatically lock once the configured 'End Date' is reached.
 - Closed:** A test cycle that has been completed. To see Closed test cycles, click on the Test Cycles' icon in the nav bar, then click 'Show Closed Cycles'.

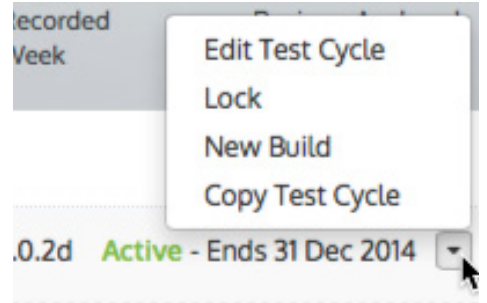


- **End Date:** The test cycle will automatically lock on this date, preventing further submissions.

Additional Options

You can find additional options within the pop-up action menu:

- **Edit Test Cycle:** Allows you to edit the test cycle's parameters
- **Lock:** Manually locks the test cycle
- **New Build:** Allows you to upload and attach a new build
- **Copy Test Cycle:** Clones the test cycle



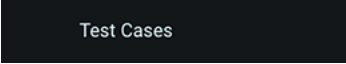
Create a New Test Case

!! IMPORTANT !!

After creating a new test case you should *always* contact your PM when you are ready to activate

To create a new test case:

1) Click on the Test Cases icon in the nav bar.

A dark rectangular button with the text "Test Cases" in white.

2) You can create a new test case in one of two ways, +New Test Case, or Import.

Create New Test Case

You can create new test cycles within the platform by clicking on “+ New Test Case”.

Import New Test Case As .csv

To use the ‘Import’ feature, for formatting instructions and to download a sample template, visit our online help desk at: <https://help.applause.com/hc/en-us/articles/201967717-Creating-Test-Cases-in-Excel>

Notes

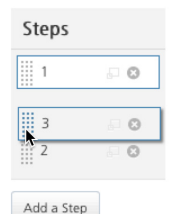
Instruction Field: Should be a single small step the tester should perform. Make it as clear and concise as possible. If your instructions become too long, then you may need to break them into multiple instructions.

Expected Result Field: Should explain what the tester should see or experience when the instruction is performed. If the tester correctly encounters the expected result, then the test case step will pass. On the other hand, if the tester encounters an error or some other outcome, they’ll report this step as having failed.

Steps: After entering in your first step, you can add additional steps simply by clicking:

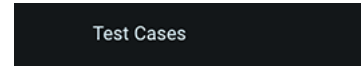
A light gray button with rounded corners and the text "Add a Step" in a sans-serif font.

Steps can also be re-ordered by grabbing the left-hand handle, and drag and dropping.

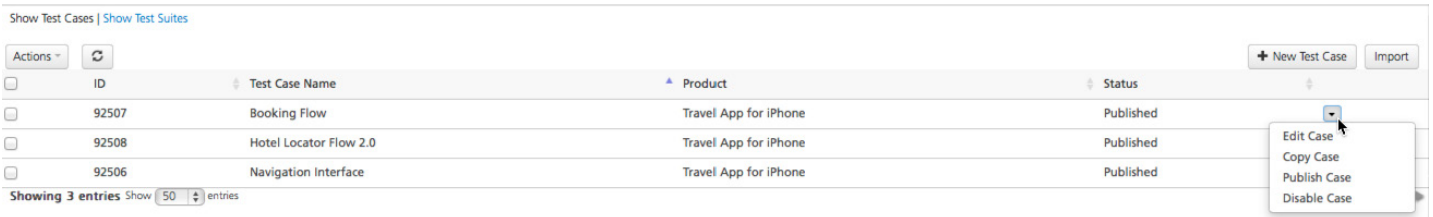


Managing Test Cases

Managing your test cases is done in the 'Test Cases' tab, accessed by clicking on the 'Test Cases' icon in the left hand nav bar.



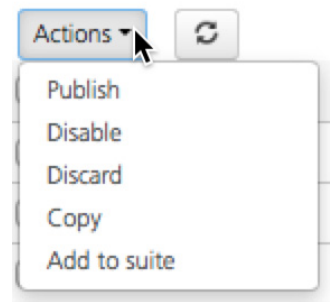
The Test Cases page lists all of your test cases, the Product they are attached to, and their current status.



Test Case Batch Actions Menu

You make batch changes to test cases by checking the Batch Actions menu next to each test case you want to modify, and then clicking on the 'Action' menu:

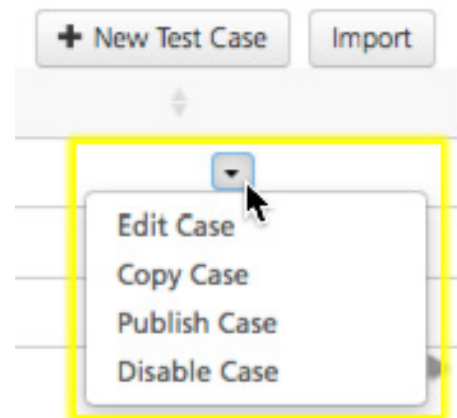
- **Publish:** After creating a test case, you must Publish it to make it active.
- **Disable:** Disabling a published test case hides it from your testers.
- **Discard:** Deletes a test case.
- **Copy:** Clones a test case.
- **Add to suite:** A test suite is a collection of test cases. What makes test suites handy is that they can be applied cross-product, making it easy to run your test cases for multiple products.



Test Case Item Actions Menu

You can also make changes to individual cases by clicking on the item action menu associated with each test case item.

Note: An 'Edit Case' option has been added to the menu of options. Select this to make changes to the test case.

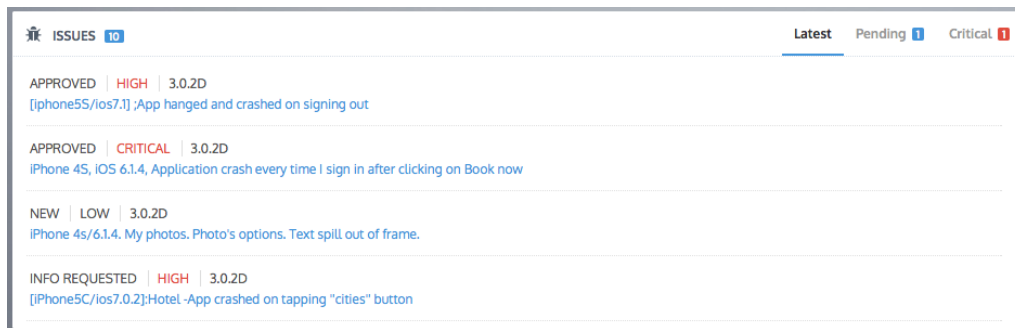


Managing Test Cycle Results

Your test cycle results are reported in two different places, within the 'Issues' module in the main Dashboard, and within the 'Issues' tab.

The Issues Module

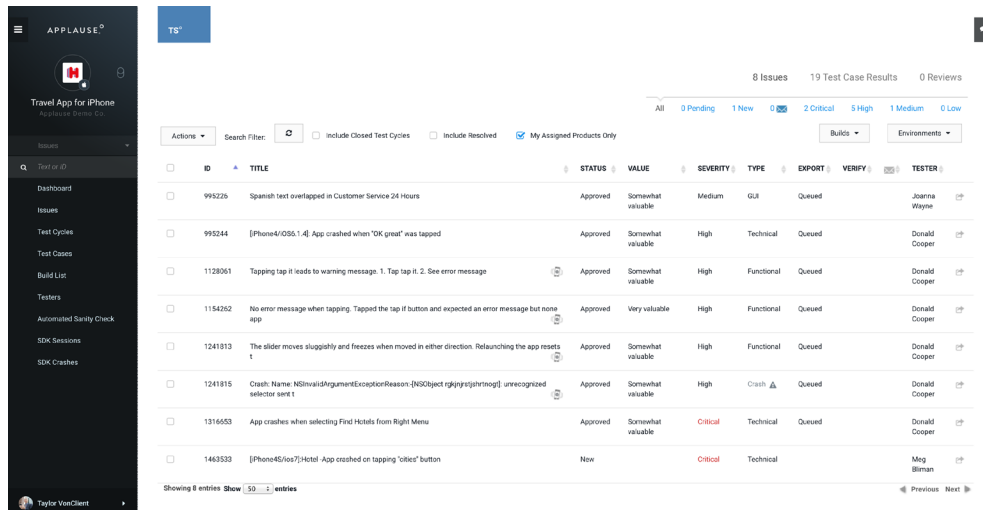
The Issues module is straight forward, displaying a scroll-able list of all reported issues, along with status, associated build number, and issue title. The Issues module can be filtered to display the latest issues reported, those flagged as Pending, or those flagged as Critical.



Clicking on an Issue will bring you to a more detailed bug report, as well as allow you to approve, reject and rate the bug.

The Issues Tab

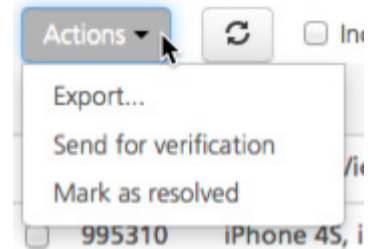
Access the Issues tab by clicking on the Issues icon in the nav bar. The Issues tab offers a comprehensive view of all reported issues as well as issue management options. This view can be filtered to show/hide closed test cases, include resolved issues, or by assigned products only. You can also filter by specific builds and environments.



Issue Batch Actions Menu

The Batch Actions menu can be used to modify multiple issues at once. To perform a batch action, click the checkbox next to each issue you want to modify, and then make a selection from the menu.

- **Export:** Allows you to perform a batch export of all selected issues to either a .csv file, or to your bug tracking database (if one has been configured).
- **Send for verification:** Allows you to post a URL or updated build which you believe resolves the reported issue, and requests fix verification from the reporting tester.
- **Mark as resolved:** When an issue has been fixed, it is important to mark the issue as resolved, which effectively closes the issue. Issues pushed to Bug Fix Verification will automatically be marked as resolved.



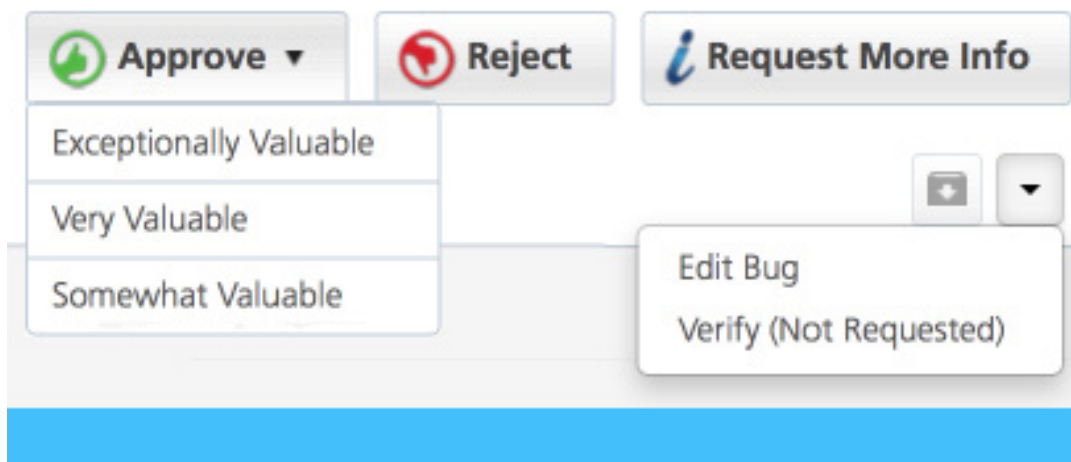
The Bug Report

Arguably the most important aspect of the bug report (outside of the actual information and data) is the bug rating. New bugs are by default unrated and unaccepted.

When a new bug is reported, if the bug is valid, click the 'Approve' button and rate the bug. Remember that bug ratings also affect tester payout and tester ratings. If a bug is invalid, out of scope, or the tester did not adhere to your instructions however, bugs can and should be rejected. Clicking 'Request More Info' effectively sets the bug as 'approval pending', and the tester is notified that additional information is needed.

The action menu allows you to edit or update the bug report, and to request bug fix verification.

Note: If a test case is edited, it will need to be re-published.



Bug Tracking System Integration

Currently supported bug tracking databases are:

- Bugzilla
- JIRA
- Mantis Bug Tracking
- Microsoft TFS
- Pivotal Tracker
- Rally
- Redmine

You setup the integration in the Product Configuration Wizard which can be accessed in one of two ways:

Create A New Product

To create a new product, simply click on the Product Menu and select the Add New Product option at the bottom of the menu.

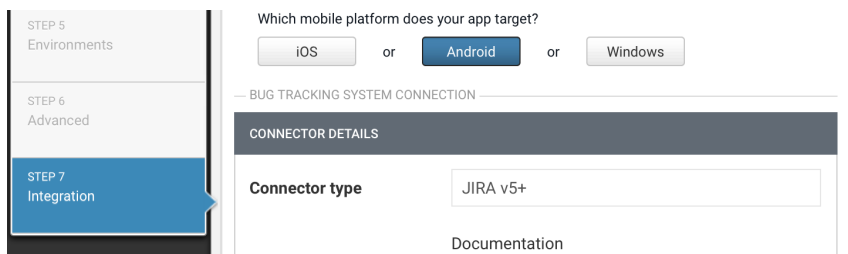
Edit An Existing Product

To edit an existing product, click on the Test Cycle icon in the Nav Bar, then click the Edit button next to the Product name.

Configuring the Database Integration

The Integration Configuration Panel is Step #7 in the Wizard. If you are editing an existing product, you will be able to click directly to that panel.

First, select ‘Add a new connector’ from the drop-down menu.



Then select the appropriate BTS option from the list of supported databases on the left, and enter additional required information in the contextual fields on the right.