

TesterX Installation Guide

Install

Install the TesterX managed package as usual, and select 'Install for Admins only' when prompted.

Post-Install

Permission set assignment

There are two permission set included in the package, only those users with permission set assigned will be able to operate the application:

- "Standard TCM User" - gives all needed permissions for the app's objects&fields
- "TCM Admin Permissions" - gives all needed permissions for the app's objects&fields and also gives assigned user right to perform additional admin duties inside the application

Both permission sets **do not** provide any additional permissions for the Salesforce Org.

To assign permission set for the user please follow the next steps:

1. Open Salesforce Setup
2. Search and open Permission Sets section
3. Search for needed permission and open it
4. Click on Manage Assignments button
5. Assign users on the next page

Community Setup

Communities should be enabled in the Org in order to complete the following steps. To enable community please follow official salesforce documentation

Create New Community

1. Open Salesforce Setup
2. Search for and open All Communities section
3. Click on New Community button
4. Select Build Your Own on the next step

5. Click Get Started
6. Fill in the Community Name (e.g. "Case Studio")
7. Press the Create button

Set Custom CSS Settings

Inside the Community Builder take the following steps:

1. Click on Theme from the left menu
2. Click on Colors
3. Click on General
4. Change Border Color to be "rgb(221, 219, 218)"
5. Go Back to Theme and click on dropdown icon at the top
6. Select Edit CSS
7. On the Edit CSS page, paste and save the CSS Code from [Appendix 1](#)

Set Custom Community Theme

Inside the Community Builder take the following steps:

1. Open Setting from the left menu
2. Open Theme section
3. Open Configure tab on the Theme page
4. Click the New Theme Layout
5. Set the "Application Theme" as the theme layout name and select "Application Theme" as the Theme Layout Component
6. Save new theme layout

Set Custom Community Layout

Inside the Community Builder take the following steps:

1. Open Home page properties from the top menu
2. Search for "Content Layout" field on the Home page properties page and click Change button next to it
3. Select "Application Layout" template and save
4. Check the "Override the default theme layout for this page." checkbox under the "Content Layout" field
5. Select Application Theme under the checkbox on the drop-down list field

Set TesterX Component

Inside the Community Builder take the following steps:

1. Open the Components setting from the left menu

2. Locate the “TCM_Main” component and Drag & Drop it to the page

Publish TesterX Community

Community can be published and available to users by pressing the Publish button at the top right corner of the community builder

Set Community Members

In order for the users to gain access to the TesterX Community, the following steps should be taken:

1. Open salesforce Setup
2. Search for and open All Communities section
3. Locate Case Studio community and press the Workspaces link
4. Click on Administration tile
5. Locate and open Members section
6. Select both “Standard TCM User” and “TCM Admin Permissions” permission sets under the left side of “Select Permission Sets” section and move them to the right section
7. Click on save button at the bottom of the page

Additional

Chatter and Feed Tracking

For the chatter to work within the application, please enable chatter feed tracking for each particular object. Select the following fields under each object to enable tracking of changes for that field inside chatter :

- Test Case
 - Automation
 - Description
 - Test Case Name
 - Workflow Status
 - Execution time
 - Prerequisites
 - Priority
 - Test Steps
 - Owner

- Requirement:
 - Description
 - Requirement Name
 - Owner
 - Type
 - Notes
 - Priority
 - Source
 - Workflow Status
- Planned Test Case
 - Execution Status
 - Last Executed Date
 - Last Executed By

Appendix 1 - custom CSS code

```
::-webkit-scrollbar {  
  width: 0.3rem;  
}  
  
::-webkit-scrollbar-track {  
  background-color: rgba(228, 228, 228, 0.6);  
  border-radius: 0.05rem;  
}  
  
::-webkit-scrollbar-thumb {  
  width: 0.3rem;  
  background: #DDBDBD;  
  border-radius: 0.25rem;  
}  
  
::-webkit-scrollbar-thumb:hover {  
  width: 0.3rem;  
  background: #c7c4c3;  
  border-radius: 0.3rem;  
}  
  
.slds-input,  
.slds-textarea,  
.slds-select,
```

```
.uiInput--input.input,  
[role=combobox] input[readonly],  
.uiInput--input.input[disabled] {  
    border: 1px solid #DDDBDA;  
    border-radius: 3px;  
}  
  
.slds-form-element__label {  
    line-height: 1.06rem;  
    font-size: 0.875rem;  
}  
  
[role=combobox] input[readonly] {  
    cursor: default;  
}  
  
.uiInput--input.input[disabled] {  
    background: rgba(228, 228, 228, 0.6);  
}  
  
.slds-input:focus,  
.slds-input:active,  
.slds-input.required:focus,  
.slds-select:focus,  
.slds-select:active,  
.uiInput--input.input:active,  
.uiInput--input.input:focus,  
.slds-textarea:focus,  
.slds-textarea:active,  
[role=combobox] input[readonly]:focus {  
    border-color: #606060;  
    box-shadow: none;  
}  
  
.slds-has-error .slds-input,  
.slds-has-error .slds-input:focus,  
.slds-has-error .slds-input:active {  
    box-shadow: rgb(245, 78, 78) 0px 0px 3px;  
    border-color: rgb(194, 57, 52) !important;  
}  
  
.slds-modal__close {
```

```
    color: #606060;
}

.slds-modal__close.slds-icon{
    width: 1.2rem;
    height: 1.2rem;
}

.slds-modal__close.slds-button--icon-inverse:hover {
    color: #F43535;
}

.slds-modal__close.slds-button__icon-inverse svg{
    fill: #606060;
}

.slds-modal__close.slds-button__icon-inverse:hover svg{
    fill: #F43535;
}

.slds-modal__close.slds-button--icon-inverse:focus {
    color: #870500;
    box-shadow: none;
    border: none;
}

.slds-modal__close.slds-button__icon-inverse:focus {
    box-shadow: none;
    border: none;
}

.slds-modal__close.slds-button__icon-inverse:focus svg{
    fill: #870500;
}

.slds-modal__header {
    padding: 1.5rem 0rem 0rem 0rem;
    border: none;
    font-family: Montserrat;
    font-style: normal;
    font-weight: bold;
    font-size: 1.25rem;
```

```
    line-height: 1.5rem;
    color: #212121;
}

.lookup-folder-modal-window .modal-container {
    width: 37rem;
}

.lookup-folder-modal-window .modal-body .div-container-root {
    height: 40vh;
    max-height: 40vh;
    overflow-y: auto;
    padding: 0.5rem;
}

.modal-window-req .modal-body,
.modal-window-test-case .modal-body,
.modal-window-search .modal-body {
    overflow: hidden;
}

.modal-window-req .modal-container {
    overflow: hidden;
    width: 40rem;
}

.modal-window-test-case .modal-container {
    min-width: 80rem;
}

.button-width {
    min-width: 6.25rem;
}

.slds-button_neutral {
    color: #F43535;
    border-color: #F43535;
}

.slds-button_neutral:active::after {
    box-shadow: none;
}
```

```
.slds-button_neutral:focus {
  border-color: #F43535;
  background-color: #FED9D9;
  color: #F43535;
  box-shadow: rgb(245, 78, 78) 0px 0px 3px;
}

.slds-button_neutral:hover {
  border-color: #F43535;
  color: #F43535;
  background-color: #FED9D9;
}

.slds-button_neutral:active {
  border-color: #F43535;
  color: #F43535;
  background: transparent;
  box-shadow: rgb(245, 78, 78) 0px 0px 3px;
}

.slds-button_neutral[disabled], .slds-button_neutral:disabled {
  color: rgba(244, 53, 53, 0.5) !important;
  border-color: rgba(244, 53, 53, 0.5) !important;
  background-color: rgb(255, 255, 255) !important;
}

.uiButton_brand, .uiButton--brand,
.slds-button_brand, .slds-button--brand {
  background-color: #F43535;
  border-radius: 3px;
  border: 1px solid rgb(244, 53, 53);
}

.uiButton_brand:focus, .uiButton--brand:focus,
.slds-button_brand:focus, .slds-button--brand:focus {
  background-color: #F43535;
  box-shadow: none;
  border-color: rgb(244, 53, 53);
}

.uiButton_brand:hover, .uiButton--brand:hover,
```

```
.slds-button_brand:hover, .slds-button--brand:hover {
  background-color: #870500;
  border-color: #870500;
}

.uiButton_brand:active, .uiButton--brand:active,
.slds-button_brand:active, .slds-button--brand:active {
  box-shadow: rgb(245, 78, 78) 0px 0px 3px;
  border-color: rgb(244, 53, 53);
  background-color: #F43535;
}

.uiButton_brand[disabled], .uiButton--brand:disabled,
.uiButton--brand[disabled], .uiButton_brand:disabled,
.slds-button_brand[disabled], .slds-button_brand:disabled {
  border: none;
  background-color: rgba(244, 53, 53, 0.3) !important;
}

.slds-radio .slds-radio_faux {
  border-color: #606060;
}

.slds-checkbox .slds-checkbox_faux {
  border: 1px solid #DDDBDA;
  border-radius: 1px;
}

.slds-radio [type="radio"]:checked + .slds-radio__label .slds-radio_faux::after {
  background: #F43535;
}

.slds-radio [type="radio"]:focus:checked + .slds-radio__label .slds-radio_faux::after {
  box-shadow: rgb(245, 78, 78) 0px 0px 3px;
}

.slds-form-element .slds-checkbox [type="checkbox"] + .slds-checkbox__label
.slds-checkbox_faux {
  border-color: rgb(196, 198, 202) !important;
}

.slds-radio [type="radio"]:checked + .slds-radio__label .slds-radio_faux,
```

```
.slds-checkbox [type="checkbox"]:checked + .slds-checkbox__label .slds-checkbox_faux {
  border-color: #F43535;
}

.slds-checkbox [type="checkbox"]:focus:checked + .slds-checkbox__label .slds-checkbox_faux,
.slds-checkbox [type="checkbox"]:focus + .slds-checkbox__label .slds-checkbox_faux {
  border-color: #F43535 !important;
  box-shadow: rgb(245, 78, 78) 0px 0px 3px;
}

.slds-checkbox_faux::after {
  border-bottom: 2px solid #F43535 !important;
  border-left: 2px solid #F43535 !important;
}

.slds-dueling-list__options {
  border-color: #dddbda;
}

.slds-listbox_vertical .slds-listbox__option_plain {
  color: #212121 !important;
}

.slds-listbox_vertical .slds-listbox__option:focus {
  background-color: transparent;
}

.slds-listbox_vertical .slds-listbox__option:hover {
  background-color: #EFF1F1;
}

.slds-dueling-list__options [aria-selected="true"] {
  background-color: rgba(244, 53, 53, 0.3);
}

.slds-dueling-list__options [aria-selected="true"]:focus,
.slds-dueling-list__options [aria-selected="true"]:hover {
  background: rgba(244, 53, 53, 0.3);
}

.slds-dueling-list__column .slds-button:hover,
.slds-dueling-list__column .slds-button:active,
```

```
.slds-dueling-list__column .slds-button:focus {
  color: #F43535;
}

.slds-dueling-list__column .slds-button:focus {
  box-shadow: rgb(245, 78, 78) 0px 0px 3px;
}

.add-test-cases-to-executions .modal-container,
.modal-window-for-linking .modal-container {
  min-width: 80rem;
  max-height: 58rem;
}

.add-test-cases-to-executions .modal-body,
.modal-window-for-linking .modal-body {
  height : 58rem;
}

.fill-requirements svg {
  stroke: #F4C947;
  stroke-width: 3px;
  fill: transparent;
}

.fill-test-cases svg {
  stroke: #BC8100;
  stroke-width: 3px;
  fill: transparent;
}

.fill-planned-test-cases svg {
  stroke: #70BD9D;
  stroke-width: 3px;
  fill: transparent;
}

.folder_icon svg {
  fill: #F43535;
}
```

```
.slds-table--bordered, .slds-table_bordered {  
  border-color: #F43535;  
}  
  
.slds-progress-bar__value {  
  background: #F43535;  
}  
  
.modal-footer.slds-modal__footer {  
  border-top: none;  
}  
  
.siteforcePanelsContainer .slds-modal__content {  
  overflow: initial;  
}  
  
@media screen and (max-width: 85rem) {  
  .modal-window-test-case .modal-container {  
    min-width: 60rem;  
  }  
}
```