

Advanced Implementation Services

Roll out right with advanced training and implementation assistance from our experts. Let us help with everything from basic configuration to user training to full-service integration and migration services.

We offer:

- Remote training via video conference
- Onsite training at your location
- Custom packages

Quick Start – 1 Day

SERVICES

- Advanced Installation & Configuration

WHAT YOU GET

We'll make sure your new software is installed, configured, and optimized for success. We'll also audit your existing server installation to ensure your system performs at scale. Our consultants will configure your instance to your environment and maximize server performance. Finally, we'll set up Helix ALM so you can implement your process (Agile, Waterfall, V-Model, or Hybrid). Cloud-based customers get their instance setup prior.

Training – 1-2 Days

SERVICES

- Administrator Training
- User Training

WHAT YOU GET

Arm your team with the skills they need to succeed. Administrators will learn how to configure a project, make changes, and extend advanced capabilities to users. Users completing this course will be able to serve as champions for their teams.

About Admin Training – 1 Day

Team leaders responsible for day-to-day Helix ALM configuration and management will learn about:

- Installation (including available components)
- Managing users and licenses with Helix ALM License Server
- Server-level options available in Helix ALM Server Admin Utility
- Creating new projects

Training – Continued

- Providing user access to projects
- Backup and recovery best practices
- Administrative options available in Helix ALM
- Configuring Helix ALM to support a team's process, including:
 - Creating custom fields and relationships
 - Configuring workflows
 - Automating processes
 - Linking artifacts for traceability
 - Creating reports

About User Training – 1 Day

Helix ALM user training is for users with varying technical skills, and includes:

- Issue, test, and requirements management best practices
- Working with items (adding, editing, organizing, and linking)
- Creating and editing filters and reports
- Enforcing traceability
- Running tests
- Document control and changes
- Creating reports
- Interface customization and workflow personalization

Workflow, Migration, & Integration Customization – 1 Day

SERVICES

- Custom Configuration
- Advanced Workflow Support
- Migration Support
- Integration Support

WHAT YOU GET

We'll work with your team to setup the product to your exact process, tooling, and business needs. If you're in highly regulated industries, we can also make sure you get the most out of Helix ALM's compliance features.

About Custom Configuration

Our team will help you implement specific items relating to your environment, including:

- Creating/customizing a traceability matrix
- Filtering your traceability matrix for exports
- Importing/exporting MS Word documents
- Customizing exported documents to match required outputs
- Configuring/using electronic signatures
- Enforcing compliance rules, if necessary (e.g. CFR 21 Title 11)
- Enforcing compliance rules within test execution phase
- Generating an audit log and project configuration report

About Integration Support

Save time and reduce errors by integrating your existing business tools – whether you want to create issues from help desk tickets, publish your team's metrics through SharePoint, or extend the capabilities of your Perforce solutions to better fit your existing environment.

After we review your business applications and discuss the benefits you'll gain by integrating tools, we'll work with you to:

- Define requirements
- Develop functional design spec outlining how we'll meet requirements
- Provide formal quote and delivery timeline, ensuring no surprises
- Schedule user acceptance testing in your environment to ensure requirements are met
- Deploy application in your production environment.

At the end, you'll receive detailed documentation that includes how to install, configure, and maintain the application, as well as any source code or other deliverables produced.

EXAMPLES

- Jira
- Slack
- Test automation tools
- Source control tools
- Running Helix ALM in a cloud-hosted environment

Workflow, Migration, & Integration Customization – Continued

About Migration Services

Ensure a smooth migration. We can help you replace your existing test management, issue tracking, or requirements management solution – whether for a single team or across the company.

Services commonly include:

- Exploring migration strategies
- Migration of historical data
- Retooling for automation
- Porting systems integrations with defect trackers, workflow management systems, etc.
- Project planning and management support

EXAMPLES

- Bugzilla
- Excel or XML imports
- FogBugz
- HP ALM / HP QC
- Jira
- QA Symphony
- Rally
- SpiraTest
- TestTracker
- TFS / MTM

Helix ALM Professional Services Packages	Quick Start	Standard	Advanced
Audit existing installation	✓	✓	✓
Set up automated checkpoints	✓	✓	✓
Configure verification of checkpoints	✓	✓	✓
Integrate with AD/LDAP	✓	✓	✓
Integrate administration automation scripts and training	✓	✓	✓
Set up disaster recovery	✓	✓	✓
Install one server	✓	✓	✓
User training	✗	✓	✓
Admin training	✗	✓	✓
Assistance planning for future scaling	✗	✗	✓
Migration services	✗	✗	✓
Integration services	✗	✗	✓
Custom configuration and workflow planning	✗	✗	✓
Duration	1 Day	2 Days	4 Days