



Leapwork Professional Services Engagement Prerequisite Guide

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The purpose of Leapwork Professional Services is to help integrate the Leapwork solution quickly and efficiently into your testing infrastructure. Access to relevant systems and environments is essential for our team to establish a scalable test framework and guide your team through more advanced concepts of test automation. Preparing these prerequisites in advance allows us to begin the engagement smoothly, focus on building automation together, and delivering value from day one.

- **Leapwork & Environment Access:** Provide the Leapwork Professional Services team with the necessary access to your Leapwork environment to enable setup, development, and enablement activities. Access requirements may vary depending on deployment type, as outlined below.

	Leapwork Cloud	On-Premise
Access Requirement		
User access to Leapwork platform for assigned consultants	Yes	Yes
Access to Leapwork Controller	No	Yes
Access to Leapwork Agents/Customer Machines	No	Yes

In addition, ensure that the required test environments (e.g., QA or UAT) are available, stable, and accessible prior to the start of the engagement. This helps prevent delays when setting up the automation framework and developing test cases.

Refer to "Guidelines to grant access to your environment" below for additional details.

- **Leapwork Project Owner Identification:** Identify at least one, ideally more for back-up purposes, Leapwork champion within your organization to be the main point-of-contact throughout the engagement. The Leapwork champion should:
 - a. Participate in the Leapwork training and complete the associated exercises.
 - b. Attend all project status meetings and be the primary contact during handover to ensure comfort in maintaining Leapwork flows post-engagement, ensuring continuity and efficiency in testing processes.
- **Assign project members:** For the best long-term results, we recommend assigning members of your QA or testing team to actively participate in the engagement. Ideally, you should assign multiple members from your organization to actively participate in the advanced enablement and co-development of sub-flows and test cases. The assigned QA Team members need to complete Leapwork training (including exercises) prior to the start of the project. These members can also include Leapwork partners, if applicable.
- **Applications Under Test (AUT):** Provide Leapwork with available documentation on the application(s) that the engagement will focus on. This information will be instrumental in ensuring our Professional Services team has a proper understanding of the application itself and the criticality of the test cases. At a minimum, please plan to conduct a walkthrough of your application(s) during the PS project start up activities.

Check for Multi-Factor Authentication (MFA):

<https://support.leapwork.com/s/article/Multi-Factor-Authentication>

- **Prioritized Test Cases & Test Data:** Provide Leapwork with a prioritized list of critical (P1) test cases that will guide the design of the core test framework and deliverables, ensuring that the most critical functionalities are tested first. Typically, this will include approximately ~20-40 test cases, depending on the scope of the project. In addition, please ensure that the required test data and credentials needed to execute these test cases are available. Providing both the test cases and supporting data upfront helps ensure smooth and uninterrupted automation development. Refer to the "Sample Test Cases Format" and test complexity definitions at the end of this document for guidance.
- **To use centralized test data in the flows,** the LW component would need access to a shared location. For on-prem setups, this could be a common drive folder. For cloud setups, this could be a SharePoint location (that can be configured in the controller).

Completing these prerequisites, helps us start the engagement smoothly, accelerate time to value with Leapwork, and set your team up for efficient and effective test automation

Guidelines to grant access to your environment

Access to customer systems is critical to ensure that Professional Services Consultants can implement a scalable test framework and enable customer teams on the more advanced concepts of test automation.

Steps to provide Access:

- Decide on which access method your business can support (see below).
 - a. Connect with your IT team and/or Security Team to discuss these options.
- Validate what information is required for external users to gain access.

- Share the required information with the Leapwork Professional Services team, who will provide needed information (e.g., name and email address of individuals).
 - a. If needed, Professional Services Consultants can sign additional NDAs for security purposes.
 - b. If needed, please reach out to your Customer Success Manager for any concerns.

Access to Leapwork Setup:

Studio, Controller and supporting software can be provided by any of below methods.

Access Type	Description	Options	Internal Access to
VPN	A Virtual Private Network (VPN) connection provides a secure, encrypted tunnel between Leapwork professional services team and your network, facilitating safe and efficient access and configuration.	• Cisco Secure Client • Open VPN • Azure VPN Client • Other industry standard VPN clients • Custom VPN solutions, where the customer provides the client to Leapwork	• Assigned VM's • Application Under Test (AUT) and its integrations
VM's	VMs provide a secure, isolated environment either within or outside your infrastructure for installing and configuring Leapwork test automation suite, ensuring no disruption to your live environment.	• RDP • Azure Bastion • Custom solutions where the customer provides the software to Leapwork	• Application Under Test (AUT) and its integrations • Leapwork, Studio, Controller, Agent • Applicable Browsers* • MS Office* • Database Adapter* on controller and agents • Shared File Path* b/w controller and agents *As per test scenarios and data requirements
Public IP With Username & Password	Leapwork Controller installed at customer end can be on a public IP. This will enable Leapwork Consultants to work on Local systems whilst connecting to customer Controller.		• Public Hosted Application Under Test (AUT) and its integrations

Sample Test Cases Format

What if I don't have any Test Cases or Test Data?

Work with your assigned Customer Success Manager and our Professional Services team to overcome this challenge.

Do you have a preferred Test Cases or Test Data template?

Download the sample test case template from here: [Download Test Case Template](#).

Test case example for the scenario of "Add an employee"

S. No	Test Case Name	Prerequisite	Test Step	TestData	Priority	Expected Result	Man Ex Time
TC_01	Add Employee	Company should be selected	Click Add employee		P1	The employee details page opens	2 min
			Select Title	Mr.		Value should be selected from drop list	
			Type the First Name	John		Text is added in the field	
			Type the Middle Names	Mortimer		Text is added in the field	
			Type the Last Name	Doe		Text is added in the field	

Leapwork Professional Services definition of test case complexity:

- Low complexity: 8 to 12 test steps which includes ≤ 4 validation steps
- Medium complexity: 12 to 20 test steps which includes ≤ 8 validation steps
- High complexity: 20-40 steps + test data dependency + 8-12 validation steps
- Very high complexity: 40 - 80 steps + test data dependency + above 12 validation steps