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# STATE OF NEW YORK



Statewide Financial System (SFS) Program  
EE1 Project

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How to Test:  
User Acceptance Testing

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## 1.0 Introduction

The purpose of this How to Test document is to provide a detailed framework for test execution for the EE1 SFS Project (PeopleSoft Financials 9.2) implementation, re-architect and upgrade.

This document includes information on How to Test and Test Specifics to guide and instruct Test Resources with test execution during the User Acceptance Test phase.

This document may be amended as needed for gaps and other design & scheduling related items or changes that occur prior to the start of testing each day.

## 2.0 How to Test

The primary objective of the “How to Test” doc is to provide guidance and instruction with what Test Resources must do before, during, and after testing. It also gives the Test Resources a baseline for what they can expect while testing.

### 2.1 Environment

Test Resources will be informed of the environment in which they are to execute testing. Identifying the appropriate environment ensures that the results obtained reflect the appropriate build release and associated customizations that have been made ready for testing. Testing of the EE1 9.2 will never be conducted in any environment other than that which is identified for User Acceptance. Test Resources are to be certain that when they conduct testing, they are to only select the environment link provided to them for the day of testing. Please do not explore and select other environment hyperlinks during testing.

### 2.2 Login Credentials

Test Resources will be provided Login Credentials appropriate for the test they are to execute prior to or on test day. If several tests will be conducted in a day, the Test Resource will be provided the appropriate login credentials for each test as needed. This ensures that testing remains on schedule, is controlled and is completed in its entirety prior to attempting to start another test. If for any reason the login credentials provided fail to work, the Test Resource should immediately notify the UAT Lead or Sub-Lead of the failure. The Test Support team can also assist in resolving where possible.

### 2.3 Testing

This is where all test materials and results will be documented. **NOTE:** *Test Resources will be required to attend the “How to Test” session before conducting any testing.* Prior to the start of testing on Test Day, your UAT Lead/Sub-Lead will coordinate and communicate tests scheduled for completion, along with any additional information needed for testing.



- 1) Execute the steps of the test. The very first step of the test will most likely be your login credentials. If it is not and you have not already received your login credentials, please contact your UAT Lead or Test Support team immediately. Otherwise, log into the appropriate test environment utilizing the login credentials provided.
- 2) Proceed to the next step of the test to be executed.
- 3) If you encounter an error, you must do the following:
  - a. Take a screen shot of the error
  - b. Note the script name and step number
  - c. Include a meaningful description
  - d. State the Role Used
- 4) If possible, continue executing script steps
- 5) Record your results in the workbook provided
- 6) Communicate results to your UAT Lead/Sub-Lead stating that you have completed your scheduled tests
- 7) The UAT Lead is responsible for sending the results on a daily basis to:  
[testing@sfs.ny.gov](mailto:testing@sfs.ny.gov) and cc: [jmorelli@kpmg.com](mailto:jmorelli@kpmg.com); [geoff.kelley@sfs.ny.gov](mailto:geoff.kelley@sfs.ny.gov).
- 8) The Test recorders and the Test Support team will enter the results to HP Quality Center.

## 2.4 Reporting Your Results

Reporting your results is very important. All test results will be entered into HP Quality Center. No one will be allowed to document their results in any other separate location, file, or application. Reporting the results in HP ALM will occur the day results are submitted.

As you are executing your assigned test, you will record your results at each step as either a **Pass, Fail, or Block** along with any comments and attachments that will assist in identifying the reason for the result given. Depending on the test, this will include either a screen shot and/or a query to provide confirmation of the Passed (or Failed) Test. Upon completion of a test, Test Resources will communicate to their UAT Lead (or Sub-Lead if the Lead so designates) stating that the test has been completed. The UAT Lead or a Test Team Member will review the notification and determine the appropriate individual(s) to validate the results. The UAT Lead will compile and consolidate into a summarized report of the testing for the week that can be provided to the JGB, executive SFS Staff, and Project Leads. They will then determine and disseminate to any other parties they deem necessary to receive the summarized report.

Use the following naming convention for your Test Workbook when submitting your results:

YYYYMMDD\_AGENCY (3-letter code)\_FLLL\_ScriptName where FLLL is first initial and last name. For example:

20150106\_SFS\_DReid\_ALM.AM.012

## 3.0 Test Specifics

This section will discuss in more detail the Test Schedule, Test Location, and Test Materials to be provided during the Test Event.



### 3.1 Test Schedule

Testing will begin and end consistently the same time throughout the testing period. Test Resources participating in testing on the assigned day will be provided:

- The tests to be executed for the day
- The order of testing and how it is to be executed
- Testing credentials required to execute testing
- Items that are **BLOCKED** from testing that day
- Response to outstanding questions from previous testing efforts
- An opportunity to ask any new relevant questions regarding testing

The EE1 Project Team Leads with Project Director, Deputy Director, and the Financials Integration Lead may convene in a **Test Defect & Status Review** to discuss:

- success of the test event
- defects identified during the test event
- tentative schedule of when defects can be resolved
- areas of testing that need to be modified in order to proceed w/ the next day test event

This schedule is the proposed method to ensure a sound structure with testing that creates a focused environment. In addition, it allows for validated defects to be discussed and addressed immediately. The Technical & Development Team will be able to address and work towards a resolution(s) that can be moved into the test environment in a timely manner.

### 3.2 Test Location

Testing will be limited and focused around specific test day events and will only be executed or consist of specific select agencies as identified in the Project Planning document. It is imperative that structure is maintained in order to keep the testing events on schedule and allow ample time and focus for the Developers to resolve valid defects.

### 3.3 Test Materials

Test Resources will be provided the materials prior to participating in each test event. The **SFS Secure Website**, also one of the test materials, will assist in communicating and disseminating the test materials to participating Test Resources. Test Resources will need to remember to check the location daily for updates and materials needed for testing. Information that will be found on the SFS Secure Site:

- Test Schedule for the Month
- Current Day's Test Event
- Test Scripts for the Current Day's Test Event
- Test Instructions for "How to Test"
- Where/How to Log Test Results
- Areas Blocked from testing
- Assistance with Test Related Issues



Test Resources will be able to ask for assistance throughout the day’s test event. Test support staff will monitor the [testing@sfs.ny.gov](mailto:testing@sfs.ny.gov) mailbox to ensure Test Resources receive assistance in a timely manner from the appropriate individual(s) who can successfully resolve the issue or answer the question.

The **Test Environment** will identify where testing is to occur. Testing in any other environment other than the current approved test environment will be invalid. Any results collected outside of the approved test environment will be discarded and issues or defects communicated as having resulted from the test will not be addressed. Test Resources are to make sure that they have appropriate access to the User Acceptance Test environment.

**HP Quality Center (HP QC)** is the tool that will house all test results and will be documented in this location only. It also defines the tests acknowledged for User Acceptance Testing. Tests or scripts that have not been approved and loaded into HP QC will not be considered valid. Therefore, any results documented outside of HP QC will not be considered. Any issues or defects not linked to an approved test script will not be addressed. This will allow the development team to remain focused on fixing and resolving valid issues and defects that address Project Requirements and Objectives. HP QC will provide the structure needed to ensure proper correlation with a link between an approved test script, requirements, and defects.

The **EE1 UAT Contacts** is a list of testing resources by agency. This allows Test Resources to view what module areas others are assigned and their contact information. All staff and consultants indicated on the EE1 UAT Contacts listing should consider their testing tasks as priority work.

A **Checklist** will be available to all in the testing area. It consists of some items to remember to have prior to the start of testing for the day. The Checklist may consist of items such as:

Testing CheckList	
1.	Ensure you have communication from your UAT Test Leads
2.	Test Environment to be used: (insert here) Please <i>do not explore</i> and select other environment hyperlinks during testing
3.	Test Support Contact Info: <a href="mailto:testing@sfs.ny.gov">testing@sfs.ny.gov</a>



## Version Control

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