Workday R4

Introduction to System Integration Test (SIT) Training

October 2016
Program Test Schedule and Status

Facility and Environment

Daily Agenda

Roles & Responsibilities

Defect Management Training

Access to Training Materials
Test Phases

System Integration Test (SIT)

- The process of testing all components of the application in a fully integrated testing environment that mimics the real world use, including the interaction with external systems. This will involve executing end to end processes including all the potential sub-processes, integrations to and from external systems and reports that may be run during the end to end process.

Performance Test

Regression Test (WD28 w/Financials)

Impacted Systems Remediation (ISR) Test

User Acceptance Test (UAT)

- The process of completing the final validation of required business functions and flow of the system by end users based on business requirements. It is also an opportunity for the project to engage additional sets of end users in the project prior to deployment and test the effectiveness of the training and documentation. UAT focuses on user controlled test scenarios and will provide insights regarding the understanding from the user community whether or not the system is built to specifications, training enables the user to be successful, and the end product provides value.
<table>
<thead>
<tr>
<th>Table of Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Test Schedule and Status</td>
</tr>
<tr>
<td><strong>Facility and Environment</strong></td>
</tr>
<tr>
<td>Daily Agenda</td>
</tr>
<tr>
<td>Roles &amp; Responsibilities</td>
</tr>
<tr>
<td>Defect Management Training</td>
</tr>
<tr>
<td>Access to Training Materials</td>
</tr>
</tbody>
</table>
Test Facilities

**Planning**
- Location
- Network / Power / Printer / Phone
- Huddle / Meeting locations
- Command Center
- Communications Zones

**Staging**
- Command Center
- Training Center
- Projector / Screen
- Tables / Chairs
- Laptops
- White / Black boards

**Accommodations**
- Kitchen
- Bathroom
- Snacks and Water
- Music
- Skype

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**Meeting Rooms**

1) Financial Accounting / ISP / Payroll Costing
2) Financial Management
3) HCM / Payroll
4) Procure to Pay
5) Gifts
6) Assets / Non-Sponsored A/R
7) Integrations / Reports / Security
8) Sponsored Awards

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25 SP 1st floor

Lobby

Winchester Ave.
SIT Environment

https://impl.workday.com/yale2/d/home.htmlld

- Workday tenant, Yale2
- Data as of August, 2016
- July payroll closed
- Security
  - Access via SSO for self
  - Testers have Proxy
  - Native login for testing
Table of Contents

Program Test Schedule and Status

Facility and Environment

Daily Agenda

Roles & Responsibilities

Defect Management Training

Access to Training Materials
Daily Routine

SIT Welcome and Kick-Off (Day 1 only)

Morning Briefing
8:30AM – 9:00AM
- Daily Morning Meeting
  - Distribution of materials
  - Overall test status
  - Blockers – existing and newly impacting
  - Current days execution schedule
  - Defect Triage

Test Execution
9:00AM – 5:00PM
- Test Scenario Execution

Daily Status & Next Day Prep
- Post execution activities
  - Enter manually submitted defects
  - Update execution status
  - Run daily metrics reports
  - Develop and distribute daily status
  - Prepare agenda for next morning meeting
  - Prepare defect triage report

------------------------- Rinse and Repeat -----------------------
Progress

Morning Briefing
- Sub-Team leads will meet with QA every morning to review current progress against the program schedule. Tactical plans will be discussed to resolve delays or prepare for escalation and support. QA and Sub-Team leads will pro-actively monitor scenario execution, program blockers, defects, and system dependencies discussing and communicating foreseeable risks.

Daily Summary
- Program status reports are developed and distributed daily after the close of the current days SIT execution window. Reports will summaries the current days activities and provide an overview of the programs accumulative test progress. Information will be distributed by email to all program management and supporting staff.

Defects

In Session Issue Tracking
- Sub-Team leads will determine if issues reported by testers are defects or change requests and summarize details during the sessions in conjunction with the tester. The summary and all supporting detail including the test number, and required HP-ALM fields will be emailed to QA for logging into HP-ALM.

Triage
- When possible, ticket assignment will be made during testing sessions and provided to QA. This will be done when the Gatekeeper is available in the testing session to discuss and review assignments. Otherwise assignments and ticket details will be updated by the Gatekeeper in advance of the triage meeting scheduled for the following day. Ticket assignment will follow the defined matrix.

Defect Review & Tracking
- HP-ALM defect triage meetings will be held daily and will focus on defect tickets as follows:
  - New ticket review beginning with the most critical issues
  - Aging defects review beginning with the most critical issues
  - Open questions and requests for assistance coordinating resolution on defects from the team leads
Table of Contents

Program Test Schedule and Status

Facility and Environment

Daily Agenda

Roles & Responsibilities

Defect Management Training

Access to Training Materials
## Roles & Responsibilities

Stakeholders involved in the defect management process should be aware of their respective roles and responsibilities, as indicated below, to ensure that key activities within the defect management process are accounted for.

<table>
<thead>
<tr>
<th>Roles</th>
<th>General Responsibilities</th>
</tr>
</thead>
</table>
| Tester                                                               | - Responsible for the execution of test scenarios  
- Raise issues and defects found during testing                                                                                                                   |
| ALM Gate Keeper                                                      | - Review the defects logged within the last 24 hours.  
- Triage defects to appropriate technical and functional teams for resolution  
- Report the defect status on a daily basis to Test Lead                                                                                                      |
| Test Execution Support (Yale and Deloitte Team Members)             | - Assist testers with completing test cases by providing guidance on WD functionality and navigation during the testing sessions  
- Coordinate with testers to define and document defects during the testing sessions  
- Review, fix, and/or reject defects  
- Proactively participate in defect triage meetings and tracking defect status                                                                                   |
| Project Test Lead                                                   | - Coordinates defect triage meetings and monitors defect resolution progress  
- Serve as the point of contact on test execution status and reviews defects for validity and severity  
- Coordinate with development team on progress of defect fixes and escalates issues  
- Coordinate and communicates upstream and downstream defect consequences  
- Accountable for overseeing defect fix progress among Development and Business teams                                                                               |
| Sub-Team Lead                                                       | - Accountable for the execution of test scenarios within their domain  
- Provide domain knowledge necessary to assist testers with the execution of test scenarios  
- Validate the integrity of defects within their functional area                                                                                                   |
ALM Tickets will be categorized by Functional Area / Business Process

Names highlighted in Red will be the primary assignee of all ALM Tickets

Deloitte Support team members will also monitor ALM Tickets by Functional Area to ensure ALM Assignees have support to work through and resolve issues

<table>
<thead>
<tr>
<th>Workstream</th>
<th>Workstream Leads</th>
<th>Yale Sub-Team Leads</th>
<th>Deloitte Sub-Team Leads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financials</td>
<td>Jacqueline Tucker</td>
<td>--</td>
<td>Jeffrey Beecham</td>
</tr>
<tr>
<td>Financials – Banking and Settlement</td>
<td>Jacqueline Tucker</td>
<td>Agnes Siniscalchi</td>
<td>David Lane</td>
</tr>
<tr>
<td>Financials – Non-Sponsored A/R</td>
<td>Jacqueline Tucker</td>
<td>Deb Armitage</td>
<td>Yuji Suzuki</td>
</tr>
<tr>
<td>Financials - Business Asset Account</td>
<td>Jacqueline Tucker</td>
<td>Courtney Connors</td>
<td>Yuji Suzuki</td>
</tr>
<tr>
<td>Financials – Procure to Pay</td>
<td>Jacqueline Tucker</td>
<td>Rob Bores</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tracy Strickland</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Nicole Riccitelli</td>
<td></td>
</tr>
<tr>
<td>Financials – Financial Accounting / ISPs</td>
<td>Jacqueline Tucker</td>
<td>Andy Sgambato</td>
<td>David Lane</td>
</tr>
<tr>
<td>Financials – Gifts</td>
<td>Jacqueline Tucker</td>
<td>Keith Della Rocco</td>
<td>Sandra Storrod</td>
</tr>
<tr>
<td>Financials – Payroll Costing</td>
<td>Jacqueline Tucker</td>
<td>Michele Greenhouse</td>
<td>Charles Williamson</td>
</tr>
<tr>
<td>Financials – Sponsored Awards</td>
<td>Jacqueline Tucker</td>
<td>Bob Davis</td>
<td>Sashi Golagani</td>
</tr>
<tr>
<td>Financials – Effort Certification</td>
<td>Jacqueline Tucker</td>
<td>Sandy Vitale</td>
<td>Marnie Fulton</td>
</tr>
<tr>
<td>Financials – Financial Management</td>
<td>Jacqueline Tucker</td>
<td>Shirley Chock</td>
<td>David Lane</td>
</tr>
<tr>
<td>Financials – FMD / COA</td>
<td>Jacqueline Tucker</td>
<td>Liz Bilodeau</td>
<td>N/A</td>
</tr>
<tr>
<td>Financials – Security</td>
<td>Jacqueline Tucker</td>
<td>Steven Fielding</td>
<td>N/A</td>
</tr>
</tbody>
</table>
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- Names highlighted in Red will be the primary assignee of all ALM Tickets
- Deloitte Support team members will also monitor ALM Tickets by Functional Area to ensure ALM Assignees have support to work through and resolve issues

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<th>Deloitte Sub-Team Leads</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCM</td>
<td>Ron Lipkins</td>
<td>HCM and ACM Team members</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>Anna-Maria Hummerstone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td>Darrell Cook</td>
<td>Arun Darwar</td>
<td>Brad Cobbs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Kevin Quigley</td>
<td></td>
</tr>
<tr>
<td>Reporting</td>
<td>Kathleen Broderick</td>
<td>Tzu-Tzu</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Poojitha</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Michael</td>
<td></td>
</tr>
<tr>
<td>Data Warehouse</td>
<td>Angela Chen</td>
<td>Erin Totz</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Robert Scott</td>
<td></td>
</tr>
<tr>
<td>Security (HCM)</td>
<td>Ron Lipkins</td>
<td>Ron Lipkins</td>
<td>N/A</td>
</tr>
<tr>
<td>Security (Financials)</td>
<td>Steven Fielding</td>
<td>Steven Fielding</td>
<td>TBD</td>
</tr>
<tr>
<td>Testing</td>
<td>Jason Shuff</td>
<td>Jason Shuff</td>
<td>N/A</td>
</tr>
<tr>
<td>Organization Management</td>
<td>Kathy Byington</td>
<td>Sarath Kraus</td>
<td>Tomislav Beslic</td>
</tr>
<tr>
<td>Workday Setup Data (HCM)</td>
<td>Ron Lipkins</td>
<td>Ron Lipkins</td>
<td>N/A</td>
</tr>
<tr>
<td>Workday Setup Data (Financials)</td>
<td>Troy Morris</td>
<td>Troy Morris</td>
<td>Jeffrey Beecham</td>
</tr>
<tr>
<td>Conversion</td>
<td>Rodney Brunson</td>
<td>Rodney Brunson</td>
<td>Andrew Dinin</td>
</tr>
<tr>
<td>Impacted System Remediation</td>
<td>Linda Faust</td>
<td>System Owner</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Table of Contents

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Defect Management Training

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Defect Management Overview

Defect Review & Tracking through HPALM

• Testers / team members involved in testing will be trained for ALM prior to testing and will be given access to ALM.

• HPALM defect triage meetings will be held daily and as and when needed. will focus on defect tickets as follows:
  – New ticket review beginning with the most critical issues
  – Aging defects review beginning with the most critical issues
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• When possible, ticket assignment will be made during testing sessions and provided to QA. This will be done when the Gatekeeper is available in the testing session to discuss and review assignments. Otherwise assignments and ticket details will be updated by the Gatekeeper in advance of the triage meeting scheduled for the following day. Ticket assignment will follow the defined matrix.

In Session Issue Tracking

• WD functional workstream SMEs will determine if issues reported by testers are defects or change requests and summarize details during the sessions in conjunction with the tester. The summary and all supporting detail including the test ID, test name, and required HPALM fields will be emailed to QA for logging into HPALM.

Resolution Management

• Functional leads in conjunction with their team leads are expected to track and manage the resolution of issues/tickets and to proactively update HPALM comments and status. The Test Lead in conjunction with the PMO when needed will assist with the coordination of issues that cross workstreams.
What is a Defect?

**Defects** occur in Workday when Yale’s configuration of the system, integrations and reporting **do not work as initially designed**.

However, these should not be confused with other errors a user might encounter, such as receiving an “error” message if a required field is left blank.

**WORKDAY DEFECTS**

- Workday accepts the submission of your transactions but sends the item down the wrong approval workflow.
- Workday produces an error when attempting to submit a form with all required fields completed.

**YOUR RESPONSIBILITIES IN DEFECT MANAGEMENT**

- Execute Test Cases
- When appropriate, identify defect
- Provide all necessary details

- Work with your sub-team lead should you have a question if the issue discovered is acting within our outside of the business definitions expected response.
- Work with the Workday QA team should you have a question while entering an issue (defect, enhancement, or discrepancy).
What is an Enhancement or Discrepancy?

**WORKDAY Enhancement**

A tester would submit an **enhancement** when the system is not following appropriate business process and there is no supporting project documentation identifying expected behavior.

The **enhancement** would represent a requested/suggested change to the existing system in support of expected business process response.

In HP ALM’s defect module, select **Enhancement** for ‘Type’.

**WORKDAY Discrepancy**

A **discrepancy** would be submitted for issues in which the system is functioning within expectations and there is no adverse effect but still the system looks or acts peculiar.

In HP ALM’s defect module, select **Discrepancy** for ‘Type’.
**Defect Severity:**

Severity of a defect indicates its criticality amongst other defects identified. The severity is the effect of the defect on the application. Determination is based on the number of test cases the defect impacts and the criticality of the associated requirements. Defect severity will determine the timeframe for identification of a resolution to the defect.

<table>
<thead>
<tr>
<th>Severity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 - Critical</strong></td>
<td>This defect has caused all further processing to be suspended. There is no work around. The problem must be corrected for the project to be successful.</td>
</tr>
<tr>
<td><strong>2 - High</strong></td>
<td>This defect has caused a serious problem in system processing. There may be a workaround, but it would result in additional work. The problem should be corrected for the project to be successful.</td>
</tr>
<tr>
<td><strong>3- Medium</strong></td>
<td>A problem that does not inhibit testing from continuing with relatively straightforward workarounds and/or has a minor impact on the business’ ability to use the application. Does not need to be fixed before go-live but requires signoff by the business of the known issue before go-live.</td>
</tr>
<tr>
<td><strong>4 - Low</strong></td>
<td>This defect does not cause a significant user or processing problem. Typically it would be deferred until after a release to production.</td>
</tr>
</tbody>
</table>
Defects are to be prioritized in order to relate the urgency of their resolution for the delivery. The priority status for a defect is set by the Work Stream Lead, indicating its importance. The severity of the defect will influence the priority of the defect.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Urgent</td>
<td>Must be fixed in the next build. Without inclusion of this, the delivery is considered a failure.</td>
</tr>
<tr>
<td>2-High</td>
<td>Must be fixed in any of the upcoming builds, but should be included in the release. Critical for success, but not necessary for the delivery.</td>
</tr>
<tr>
<td>3-Medium</td>
<td>May be fixed after the current release or in the next release.</td>
</tr>
<tr>
<td>4-Low</td>
<td>May or may not be fixed.</td>
</tr>
</tbody>
</table>
# ALM Defect Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Assignee</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>All defects opened are flagged with a status of New with a value for Severity and Priority</td>
<td>Tester</td>
<td>Gate Keeper</td>
</tr>
<tr>
<td>Open</td>
<td>Gatekeeper is reviewing and determine assignment</td>
<td>Gate Keeper</td>
<td>Yale Owner</td>
</tr>
<tr>
<td>Assigned</td>
<td>ALM Ticket has been assigned to Yale Support</td>
<td>Yale Owner</td>
<td>Yale Support / Deloitte Support</td>
</tr>
<tr>
<td>In Progress</td>
<td>Issue is in Progress</td>
<td>Yale Support / Deloitte Support</td>
<td>Yale Support / Deloitte Support</td>
</tr>
<tr>
<td>Ready for Retest</td>
<td>Defect has been fixed and ready for retesting</td>
<td>Yale Support / Deloitte Support</td>
<td>Tester</td>
</tr>
<tr>
<td>Failed</td>
<td>Test has failed, Gatekeeper to review and reassign</td>
<td>Tester</td>
<td>Tester – Goes back to Yale Support</td>
</tr>
<tr>
<td>Resolved</td>
<td>Defect has been resolved</td>
<td>Tester</td>
<td>Yale Owner confirms. If Yale Owner disagrees the status goes back to the Assigned status and Yale Support team that worked on the issue</td>
</tr>
<tr>
<td>Deferred</td>
<td>Determined that it is Low Priority / Low Severity and will not impact Go-Live</td>
<td>Yale Owner</td>
<td>Gate Keeper</td>
</tr>
<tr>
<td>Rejected</td>
<td>Determined that it is not a valid defect or determined as a duplicate</td>
<td>Yale Owner</td>
<td>Gate Keeper</td>
</tr>
</tbody>
</table>
https://hpalm.its.yale.edu/qcbin/start_a.jsp