

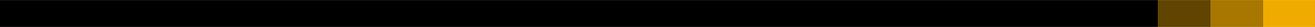
## Customer Testing Overview

Provides instruction, sample tables, and ideas that will help you determine how to test and validate your system configuration.

Brought to you by the [SAP SuccessFactors Services Team](#)

CUSTOMER





## INTRODUCTION

Deciding what and how to test is an important part of every project involving technology and/or multiple-step business processes. While the final decision on what and how to test is ultimately yours to make, the following document will provide ideas and aids found in a typical test plan.

The following sections are areas you need to consider for your own test plan.

- Different types of testing
- Testing using the Activate Methodology
- Roles & Responsibilities
- Defect Management Process
- Testing Guidelines
- System Access
- Testing
- Documenting Issues and/or Questions
- Completion of Testing

## DIFFERENT TYPES OF TESTING

Depending on where you are in the project lifecycle, you will need to perform various types of tests. The most common ones performed during an SAP SuccessFactors project are the following:

- Functional Unit test
- Integration test
- User Acceptance test
- Regression test

The most common type of test is the functional unit test which occurs during the iteration test cycle. During functional unit testing you are testing that the functionality works as advertised. This is a good time for the users to get familiar and play around in the system.

The integration test is usually performed later in the project when interfaces need to be developed or connected. The user will test an end-to-end process and may involve receiving or sending data out. The integration test can also be between SAP SuccessFactors modules.

User Acceptance test is just as it sounds, a formal test before go live for the users to officially sign off that all testing is complete and they are ready for go live.

Regression tests are used when something previously working and tested has changed and needs to be tested again to ensure it still works. One example would be after a new release is installed in the preview instance, a customer might want to go in and run regression tests on all their critical business processes.

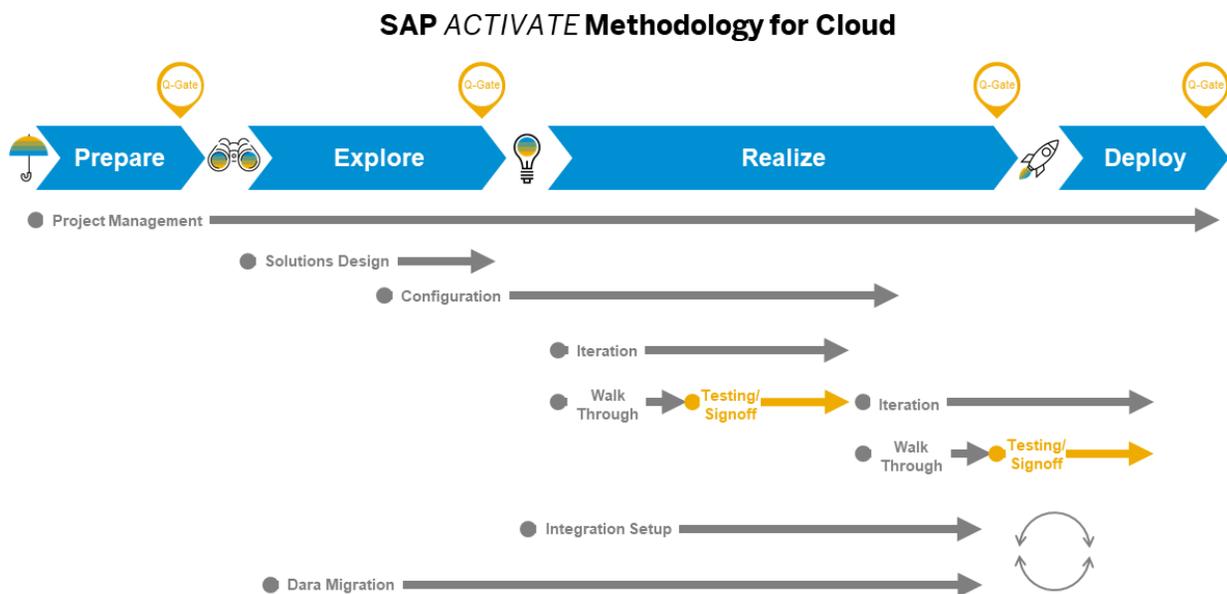
## TESTING USING THE ACTIVATE METHODOLOGY

Activate is the recommended methodology for all SAP SuccessFactors projects. During the Realize phase of the Activate methodology, the system is built out using an Agile method. The build is broken into smaller pieces called iterations. During the first iteration, the functional consultant will walk through the system and demonstrate the processes that have been built out. After the walkthrough is the first opportunity that the customer has to test their system. This is where the majority of changes or defects are noted by the customer. Once all issues are documented, the iteration is officially signed off. The consultant will then go back into the system and make the

necessary changes that were signed off and documented. After the configuration is updated, the consultant will schedule another walk through which begins the next iteration.

Some projects have 2 to 3 iterations depending on scope and level of configuration changes needed. In the case of an SAP Model Company for HR project there may only be 1 iteration because the customer is accepting leading practices.

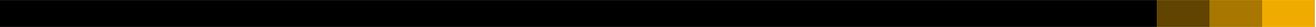
After each iteration, the amount of changes will decrease. For example, during the first iteration, the customer might note 14 changes needed. The next iteration might only uncover 2 or 3 changes. It is during the later iterations where security roles should be tested.



## ROLES AND RESPONSIBILITIES

This document is designed to provide ideas for customer testing. Refer to the SAP SuccessFactors Professional Services Overview and Statement of Work for more details on testing roles and responsibilities.

From the Statement of Work Exhibit 1: **Testing:** Customer is responsible for creation and execution of all Service and user acceptance test plans. Customer Technical Lead must lead the end-to-end testing process and lead the execution of all required test cases.” In a typical SAP SuccessFactors project, the customer is responsible for all testing and the implementation partners correct the reported defects.



The most common roles when it comes to testing are the following:

- Test Lead – responsible for the coordination of the testing efforts for the project and reporting key metrics.
- Functional Leads or SME's – responsible for developing test cases & expected results in their respective areas
- Implementation consultants – responsible for resolving defects
- Testers – end users who are responsible for executing test scripts and reporting defects
- Defect Manager – responsible for triaging defects and assigning them to the appropriate party. This role is sometimes filled by the Test Lead.

Depending upon the project plan schedule, it is crucial for the customer to prepare for a comprehensive test plan. It should include all aspects of testing including functionality, security, integrations, and data.

### DEFECT MANAGEMENT PROCESS

Part of every good test plan is a well-defined Defect Management Process. The process should contain the following sections:

- How to log a defect, what pieces of data to capture
- Tool will be used to enter and track defects
- Who will assign the defects to the respective owners
- Metrics to be derived
- Expectations on turnaround time to resolve defects
- Define the defect categories and severity

### TESTING GUIDELINES

The overriding goal of testing is to make sure that business processes can be carried out in the system. At a minimum, we suggest setting up test cases that covers the end to end process. This integrated and comprehensive approach will exercise all aspects of the application which are leveraged by the business process. In addition, it is a good idea to test related processes and systems such as the process to make changes to the data file and import data back to HRIS.

Try to consider testing each unique situation possible when designing test scenarios, including corner cases and negative test cases. To give you an idea, the following is an example of the testing considerations for the Performance Management module:

For the items in the list below we suggest testing each unique form at least once. (Note that a form which renders differently based on job code should be considered unique. If a large number of job codes are used, a significant random sampling should be tested).

- Forms
  - Introductory text (content, spelling, etc.)
  - Hyperlinks/pop-ups
  - Appropriate section names and colors
  - Pre-populated data (First name, Last name, Title, etc.)
- Competencies
  - Correct competencies in library
  - Appropriate Configurability (add/remove available or not)

- Correct population of competencies (based on job code)
- Weights and rates (if section has no pre-populated competencies add one and check rating scale)
- Rating scale link detail (if appropriate)
- Goals
  - Correct goal listed as corporate goals
  - Appropriate Configurability (add/remove available or not)
  - Correct population of goals (based on job code)
  - Weights and rates (if section has no pre-populated goals add one and check rating scale)
  - Rating scale link more detail if appropriate
- Workflow
  - Process steps labels
  - Exit and entry text correct
  - Ask for edits/comments appropriate
  - All form template configurations set correctly on each form and each form is rendering these choices properly
  - Correct users are in flow (Manager, 2<sup>nd</sup> Level Manager, HR Representative, etc.)
  - Notification e-mails are sent at appropriate stages
  - Notification e-mails contain appropriate content
- Calculations
  - Weightings are working as documented in the “form creation notes” doc
  - Overall rating is correct
- Extract
  - All field are in the extract
  - Data has been tested end to end
- Data load/update process
- Process interfaces or data uploads to other HR processes or systems such as HRIS, comp or learning management
- Related business processes
- External support materials (i.e. training tools, intranet sites, etc).
- Help desk/user support processes

## SYSTEM ACCESS

To access the SAP SuccessFactors solution, obtain the SuccessFactors login URL from your Professional Services consultant and enter it in your favorite certified browser. Please remember to bookmark this page.

You may also embed your company ID in the login URL.

e.g.

[https://performancemanager4.successfactors.com/login?company=\[CompanyID\]](https://performancemanager4.successfactors.com/login?company=[CompanyID])

The Company ID will already be filled in for you, but please take note of the ID for future reference.

From this point you will be asked to enter a ‘Username’ and Password’. The following lists of “test employees” have been loaded into your database. You can login as any of these individuals to test the application form different views/capabilities.

Username	Password	Employee Name	Role	Job Code <sup>1</sup>	Privileges <sup>2</sup>
admin	admin	Administrator, The	administrator	99	all

Note: Upon logging in as any user (except admin) you will be prompted to change the password...please change each user's password to **'test'**, to allow other testers and SuccessFactors to access the application as these individuals. (If more rigid password rules have been set, please choose a different password for test users which meet the password rules.)

All email addresses for notifications have been set to:

INSERT e-mail ADDRESS HERE

## TESTING

As you test your application, you can use the available documentation (e.g. Online Help) and please be aware of the following configuration variables unique to your environment:

- **Testing Notes** – general notes about your instance as you begin testing.

Description
If appropriate: We need to finalize the routing maps for each form – I used a couple of samples for your reference – CS form does not automatically include employee; other form does)
Use caution as you look at the administration functions – changes WILL have a real time impact on the system
Depending on business rules for your client We will need to limit the access to the performance review form/s once in production – this will allow the system to automatically assign correct form based on user permissions (CS form for CS department only)
If your team is interested in defining more detailed test scenarios, please see “script sample.xls”

<sup>1</sup> If you are using the auto population capability, the job code determines the competency set to display on the form.

<sup>2</sup> Application security privileges are assigned by the administrator. all - has access to all functions including advanced reporting and administration; user - does not have access to advanced reporting or administration; user + e summary - has enhanced summary capability in summary tab

- **Documents** – you have the following documents loaded into your system for your review:

Document Name	Purpose	Default Routing Chain <sup>3</sup>	Allowed to Create? <sup>4</sup>
Performance Review	Standard Performance Review	EM-E-EM/EM-E-EMM	all
Performance Review – CS	Review for Customer Service	EM/EM-EMM	all
General Note	Documenting an achievement	O-C	all
Development Plan	Sample Dev Plan	EM-E-EM/EM-E-EMM	all

Note: You can control which of these documents (or others) you will actually turn on for production. As you evolve your implementation you can create/add document templates for use in the PM process (e.g. 360 feedback, etc.).

- **Rating Scale** – the following scale/s are used in your instance.

Scale Description	Form Section/s
0 to 4 point scale in .1 increments	all

### DOCUMENTING ISSUES AND/OR QUESTIONS

As you test your application, document issues or questions (using the format below) and forward them to your consultant so we can address them immediately. Record details to allow us to reproduce the issue.

#	Date	Issue/Question Description (include specific steps to reproduce)	Resolution	Status

<sup>3</sup> Key: E = employee; EM = Employee's Manager; EMM = employee's manager's manager; EH = Employee's HR rep; O = Originator; C = Complete; items before/ - modification stage; items after/signature stage

<sup>4</sup> system administrator can restrict who is allowed to create each document.



#	Date	Issue/Question Description (include specific steps to reproduce)	Resolution	Status

**COMPLETION OF TESTING**

At the completion of your testing we will inactivate the test employees and insert your actual employee data file. Or, if you desire, leave these active for use during user training.

**APPENDIX A: SAMPLE TEST SCRIPT**

**Test Case Name:** PM Form General

**Test Script Number:**  
1

**This script tests:**

**Pre Test Conditions / Dependencies:**  
*if applicable*

**Data needs:**

**Test Case History**

<i>Executed By</i>	<i>Date/Time</i>	<i>Execution Status</i> <i>Pass/Fail</i>	<i>Notification</i>	<i>Comments</i>

#	Test Condition	Navigation / Screen	Expected Results	Actual Results	Pass / Fail	Issue #	Comments
1	Logon	Open Internet Explorer					
		Go to URL: https://unique client	Employee in-box [Welcome Page] should be displayed				
		Click links					
2	Create 'New Document'	Click " <b>new document</b> " button	Should display list of document titles				
	Validate the " <b>Choose a Document</b> " screen		<b>Choose a Document</b> <i>Click on one of the links below to choose a document</i>				
		Verify all documents are in list	Form 1				
			Form 2				
	Choose "FORM 1"	Screen changes to the " <b>Choose a Subject</b> " screen					
3	Validate the " <b>Choose a Subject</b> " screen		<b>Choose a Subject</b>				
			<i>Click on one of the links below to choose</i>				

			<i>a subject for the document</i>				
		Verify all direct reports are in list (template configurations can alter this list - see "set targets")	Direct reports should be listed				
		Choose a subject	Review Periods and Due Date page should display				
		Enter appropriate start, end and due dates. Click "send to self" this will vary based on route path	Form should appear				
			Should take back to inbox				
4	Test all links	list all links that appear					
5	Test competencies	list all competency sections and what should be included					
6	Test goals/objectives	document appropriate attributes that should appear					
7	Click send	* enter verbiage that should appear on entry/exit text * Define appropriate route path components here					
8	document remainder of route path and steps to test based on process doc						

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