COLLABORATIVE SOLUTIONS
A **Cognizant** Company

Ask the Experts: Best Practices for Testing

Structure and Planning:

1. **How is Testing for a Workday Implementation different than "traditional" project testing?**
   - On traditional software projects, testing is often approached in a feature or function approach, whereas Workday implementation testing is done systemically. Workday implementation Testing leverages high-level Test Scenario's that are executed in an end-to-end fashion to validate the configured business processes across functional areas.

2. **How is Testing best "Structured" for a Workday Implementation?**
   - Testing for a Workday Implementation typically consists of:
     - Unit Testing
     - End-to-End (E2E) Testing
     - Payroll Parallel Testing
   - Unit Testing is usually performed by the implementation partner, while End-to-End Testing is typically the responsibility of the Customer and may be broken into multiple "cycles" or periods of time organized around test execution, issue remediation, and regression testing. If Workday Payroll is in scope, the periods of time are generally based in Pay Period start and end dates. Parallel Payroll testing is also performed in "cycles", with specific comparative targets for data accuracy between the Legacy Payroll system and Workday Payroll.

3. **When should I begin planning my Testing?**
   - Planning needs to begin as early as possible in a Workday Implementation project to ensure necessary resources, an adequate testing timeline and tasks and milestone are included in the overall project plan. The Planning phase is the best place to start your Testing preparations, beginning with the Test Strategy document.

Testing Preparation:

4. **How should I approach Testing for a Workday Implementation?**
   - Start by creating a solid Test Strategy document. This should be a living document that defines the "who, what, when, where and how" of Testing. Some key considerations of the Test Strategy include the resources needed to perform testing, what is and what isn't going to be tested. Most importantly, the entrance and exit criteria for the various testing phases should be documented to ensure alignment across the team.

5. **How much time will be needed for Testing?**
   - This largely depends on the several factors which include the Functional Areas included in the implementation (such as Recruiting, HCM, Absence, Benefits, Procurement, Business

Assets, etc.), the complexity of the Business Processes and configuration, the number of Integrations, and if Payroll is in the implementation scope. Generally, smaller implementations that are based in a single Country without Payroll (US only, for example), typically need 6-8 weeks of End-to-End Testing whereas a large, Global Workday implementations across multiple Countries may take up to 4 months for End-to-End Testing. Payroll Parallel Testing typically takes an additional 2-3 months.

6. How do we create End-to-End Test Scenarios and how many do we need?

- Start by focusing on your "to-be" business processes and day-to-day activities for each Functional Area. Each Functional Area team should begin as early as possible capturing notes for possible Test Scenarios (even as early as the Plan Phase). End-to-End Test scenarios should be refined in the Architect and Configure & Prototype Phases, and should be complete well before End-to-End testing starts. It's a best practice to have the team who is engaged in Plan, Architect, and Configure & Prototype Phases to create the Test Scenarios, as they are most familiar with the requirements. End-to-End Test Scenarios should be kept at a high-level and not detailed scripts. – The scenarios should not go down to a step-by-step detail as this will take too much time to write and execute. There are multiple paths to complete the tasks associated with a scenario, so dictating the exact path is too constrictive to learning and testing Workday. Organize the Test Scenarios so they can be executed from "Hire to Retire" – for example, take a New Hire through all the Functional Areas that are being implemented (Recruiting through Payroll), or a transaction from Procure to Pay if Financials is in scope.

7. What Testing Considerations do we need for new Workday Releases?

- Within the context of an Implementation, determine the impact analysis and regression testing for a Workday Release is highly dependent on the features and functionality that you've selected to implement, coupled with the base feature upgrades that Workday has selected for improvement will guide what needs to be tested. Workday Community and Collaborative Solutions can help to guide you in choosing the impact of the bi-annual Releases, as well as determining what approach should be taken for Regression testing.

Test Execution:

8. Who should be involved in Test execution?

- The team members who have been involved in Plan and Architect sessions for their respective Functional Areas should be the primary testers. This enables the team to execute their scenarios more efficiently. Additionally, these are the resources who are most familiar with the Business Processes and requirements. They will understand the "why" the decisions were made and know if something is not functioning as designed.

9. What processes should be in place for Test Execution?

- There should be robust policies around Test Scenario execution by criticality/importance, as well as Issue Management and Change Control. The roles and responsibilities should be well

defined, and mechanisms in place to communicate metrics around test execution and issues is necessary. Another key process is around the scheduling and coordination of execution for Integrations.

10. What other activities are occurring while Test Execution is in progress?

- o One of the main additional activities which take place during E2E testing is Knowledge Transfer. Other activities that are occurring while Test Execution is in progress includes preparation for Payroll Parallel testing, as well as preparation for Organizational Change Management and Training (OC&T) activities including the development of training materials and User Experience Sessions, which involve participants completing scenarios within Workday to assess training materials and in-system guidance.

Managing Testing:

11. How do we manage and coordinate Testing?

- o It's extremely important that you have a dedicated resource (or even multiple dedicated resources for larger implementations) who is responsible for managing Testing for your project. This crucial role will ensure that testing stays organized, on-track, and meets the Entrance/Exit Criteria for the Testing Phase. This resource will need to work across multiple functional areas and be the driving force for the successful completion of the Testing Phase.

12. How do I measure my Test Progress?

- o Metrics should be gathered and used to track Test execution progress. It's important to ensure there are daily and weekly test scenario execution targets for each Workstream to ensure each team is aware of the progress they need to make. Some basic Test status that should be captured include and reported on are: In Progress, Pass, Fail, Ready for Retest, Out of Scope and Duplicate. Other status can be captured as well, depending on your organization.

13. How do we manage Issues and change?

- o Issues should be reviewed on a daily basis during Test Scenario execution for priority and severity to ensure Issues are addressed in order of importance. It's also important to control Change during Test Execution. Issues should be reviewed and evaluated to determine if these requirements were identified and decided on during the Plan and Architect phases. A strong Change Control Process is imperative during the Test Execution phase. This process involves documentation of changes that have been made, which is critical for communication with OC&T as they develop training materials.

Payroll Parallel Testing:

14. What is Payroll Parallel Testing?

- o Payroll Parallel Testing is your dress rehearsal for Go Live. During this testing, your payroll team members process Payroll for a specific past pay period in Workday. The results from

Workday are compared to the results from your Legacy payroll system for the same pay period.

15. What do I need for Payroll Parallel Testing?

- o Payroll Parallel testing cannot begin until End-to-End testing has completed and signoff achieved. Similar to the End to End Testing Phase, a detailed Payroll Parallel Test Strategy document is the key to a successful Payroll Parallel Phase. The Plan should include how to capture all Payroll impacting transactions, catchup transactions, and integration data. Payroll Parallel is not just executed by the Payroll teams. It is truly a cross-functional phase which will require expertise from HCM Absence, Compensation, Advanced Compensation and Time Tracking resources to be successful. These resources will provide assistance documenting the transactions needed and the issue research and resolution.

16. How do we execute Payroll Parallel testing?

- o The Payroll Parallel is executed in a separate tenant build. This build tenant should be as accurate as your Go Live build. Data transactions from the Legacy Payroll system for the Parallel Payroll periods identified in the Payroll Parallel Test Strategy document is obtained. The Payroll processes are executed in Workday to generate all relevant payroll data. Discrepancies are researched by your team. Earnings, Deductions and Taxes are evaluated between Workday and your Legacy system and unexplained differences must be 1% or less at the end of the Phase. Collaborative does this for at least 2 consecutive payroll periods depending on the implementation approach for your project. All payroll impacting integrations (inbound and outbound) must be run during this phase also.

Testing Tools:

17. What Testing Tools are helpful for my Workday Implementation?

- o Typical Testing Tools that are helpful for a Workday Implementation capture and track the execution of the End-to-End Test Scenarios, as well as capture and track Issues that are logged during test execution. In addition, a tool to track any Change items for review and approval is needed. These represent the very basic set of tools that are needed.

18. Should I consider Automated Testing tools to support our Workday Implementation?

- o Automated testing can be considered, as long as the set-up, recording of End-to-End Test scripts and the maintenance/upkeep of the automated scripts do not jeopardize the progress or completion of End-to-End Testing. There are several tools that can be used, and as with any automated approach, the goal shouldn't be to augment testing during End-to-End, but to ensure proper, efficient and effective testing for Workday's Bi-Annual releases as well as customer-initiated changes once their Workday Implementation has gone live in "Production".

Attendee Questions

19. Do you have recommendations or strategies to free up the SMEs who have their "regular" job to do in addition to the heavy implementation duties?

- o Our strongest recommendation is to offload some of the non-project day to day work from resources who are heavily involved in the implementation to ensure the best results. Holding the line of other non-implementation changes is also recommended. This is not the time to redesign all your benefits offerings, for example, if that can possibly be avoided. Another option is to have co-leads on the customer side to allow work to be divided.

20. Are there any recommendations for testing change to time off plans or accrual?

- o In the course of your Workday implementation, you may be changing your current practices to meet functionality available with Workday. These workstreams have a true cross-functional nature. Our recommendation is that the Time Tracking and Absence SME's and your implementer work very closely with the Payroll SME's and Implementation consultants. Document your Test Scenarios for your new functionality but keep in mind that these might create known or acceptable differences in your Payroll Parallel comparisons.

21. Do you have implementation checklists you can share?

- o Yes, our EMs have a number of tools and templates that are shared with customers on projects. Depending on the specifics of the project, the appropriate material will be shared with you.

22. Do you have any recommendations for cross- functional testing? How do we best approach it and when in a testing cycle?

- o Cross-functional testing should be an intrinsic part of your End-to-End Testing; it ensures that the configured Workday Business Processes pass data across Functional Areas according to the agreed-upon requirements. Test scenarios for cross-functional testing should be created during workshops with representatives from all impacted Functional Areas (since communication between the teams is vital to success!) to ensure that require data (and Integrations) are considered. These scenarios should be given a higher priority and executed early in End-to-End Testing. Communication between teams during test execution ensures all team members participate in validation and review of the configuration.

23. What would be your recommendation key difference between E2E and UAT testing phases?

- o There are several differences between E2E and UAT Testing. E2E testing is meant to validate the Business Processes and configuration against the requirements, while UAT

may utilize a sub-set of those scenarios, with a focus on demonstration of Business Processes. The focused validation should be the focus of E2E, not UAT.

24. Do customers do performance / load testing on Workday during implementation?

- Customers should avoid executing Performance Testing since Workday is a robust cloud-based solution. Performance and load testing is not required by Workday for every implementation. Should Workday require performance and load testing, your Engagement Manager (EM) will help coordinate that testing with Workday.

25. What test automation solution do you recommend for testing future releases / regression testing?

- Collaborative Solutions has developed a robust partnership with several Automated Testing solutions. These solutions interact with Workday in a way that most Automated Testing tools cannot. To get a better understanding of our Automated Testing partnerships, please reach out to your Engagement Manager.

26. Have you seen any implementation where the customer did the unit testing? I have seen those requests in the past.

- Yes! Based on the implementation approach for the project, the customer may be performing the Unit Testing in addition to the Consultants. Keep in mind that this may be an extra burden on the team who may have other activities that are more pressing.

27. E2E testing is employee life cycle testing but what about the other components that can be tested on their own like Time and Absence, Benefits, Compensation, etc.?

- There is always testing for each functional area which can be tested during E2E testing. You are not able to hire a new employee to fit every scenario. A good example for this would be for Compensation to test each One Time Payment plan and to work with Payroll to ensure it is processing properly. This serves two purposes. Compensation tests their Request One Time Payment business process and payroll gets the inputs needed. That holds true for all the functional areas listed. Another example of testing to be done during E2E cycle for payroll would include testing all the Payroll Integrations like Tax Filing and Banking (ACH & Positive Pay) as well as testing all of their Pre and Post Payroll Auditing and reports.

28. Payroll parallel testing – isn't it needed when the client is changing their payroll system to Workday payroll? For the ones that are not changing their payroll systems, some of the implementors have advised clients it is not required.

- o That is correct. The purpose of parallel testing is to test and compare the output from Workday payroll configuration to your legacy system. If you are not implementing Workday Payroll, there is no Parallel Testing Phase.

29. When do you recommend automated testing? We have about 200 business processes and I don't feel like we really need automated testing since it would benefit our functional leads to be more hands on with testing. When is automated testing beneficial?

- o Our Recommendation is that Automated Testing is not used as the primary testing method during the implementation cycle. Automated testing can be very beneficial for volume testing, or regression testing changes that are made once implementation to Production, for any break-fix Releases by Workday, and especially for bi-annual Workday Releases (which tend to include changes to major functionality). Before deciding if Automated Testing is needed or not, considering the pro's and con's is strongly advised. Things such as tool cost and licensing, upkeep/maintenance of automated scenarios, time required to manually test changes, frequency of changes that require testing and time required from manual resources are all factors to consider. Finally, once a decision is reached (to automate or not), this decision should be revisited frequently, as any of the above factors change rapidly.

30. How have you seen testing executed without proxy being enabled?

- o Testing without proxy can be done, but it takes much longer. If the concern to not use proxy today is because of system access or access to sensitive data, there are two ways to accommodate this. It would be possible to set certain user accounts with passwords only communicated to specific testers. The users testing would then have to log out and log back in or run Workday in different browsers. The other option would be to have dedicated users for functions and pass the test scenario from one person to the next to take action. Whichever approach is agreed-upon must be detailed out in the Test Strategy document.

31. Do you create scenarios for Payroll - for users to run during Payroll Parallel?

- o The purpose of parallel testing is to test and compare the output from Workday payroll configuration to your legacy system. Because of that, the only inputs into the Workday system should be the transactions for that period processed in your Legacy system. Therefore, there are not scenarios to test.