UM Testing Checklist

Each time a new release or service pack is readied for deployment, Tyler Technologies thoroughly tests all parts of the software; however, due to the configurability of the applications and each customer's unique deployment environment, we strongly recommend that you test the processes and features noted on this checklist each time you apply a hardware or software update. Although testing may require a large time investment, it is small compared to the potential costs of correcting preventable problems in a production environment.

This checklist is designed to help your organization verify that all of the application's features are working correctly before the update is rolled out in your production environment. We have tested all core parts of the application, but the ancillary functionality that is often customized (e.g., calculations, forms, imports and exports) or uniquely configured to your environment (e.g., cash registers, slip printers, check signers, eSuite services) should be tested locally to verify accuracy and compliance.

For testing that involves license keys and user security, it is important to test the software with your unique security configuration before applying an update to your production environment. In all cases, unless specifically referenced for an item in the release notes, Tyler tests the software with a license key that has access to all applications, modules and user profiles.

**Test System Considerations**

Your test system should be refreshed to a recent copy of your live DB, to facilitate user testing.

Depending on your configuration and use, the Tyler system sends outbound email messages to consumers. After refreshing your test DB, you should configure it to be disconnected from the SMTP server so email messages will not be sent.

Depending on your configuration and use, the Tyler system interfaces to a payment gateway to charge credit cards. After refreshing your test DB, you should configure it to be disconnected from the gateway so charges are not processed.

**Core Processes**

Some processes are highly dependent on your environment to function correctly or are a critical part of your daily operation.

If applicable, these items should be tested and validated.

* Process a parallel billing.
  + Review the billing calculations.
  + Validate the general ledger amounts.
* Bar code reading bills.
* GIS Integration.
  + UM Customer Service.
* Slip Receipt Printers.
  + Print Receipts.
  + Form Validation.
  + Check Validation.

**Forms**

Tyler tests only the standard version of any form. Regardless of whether you are using a custom version of a form, please verify that all of the applicable forms on this list produce the expected output. In all cases, testing should include generating the output and printing the form to verify that signatures, MICR coding, bar coding, OCR coding, etc., all appear as expected.

* Cycle Bill.
* Aggregate Bill.
* Exception Bill.
* Re-print Bills.
* Transaction Statement.
* Consumption Trend Report.
* Sub Meter Report.
* Delinquent Statements - all levels.
* Work Order.

**Imports, Exports, and Interfaces**

Tyler tests only the import and export functions using the standard file definition for the process. Regardless of whether you are using a custom version of an import or expert, please verify that all of the applicable imports and exports on this list produce the expected results. Exported information should be consumed by whatever external process uses that data. Imported information should be reviewed at a high level to verify completeness and accuracy. Interfaces should be tested by executing the key processes in the interfacing application to assure information was received correctly.

* AMR Export, the process and the read “guns” work
* AMR Import, the process works and reads are correct
* Non-Metered Units Import
* Cycle Bill 3rd-Party Bill Print Export
* Exception Bill 3rd-Party Bill Print Export
* Lock Box Import
* Bank Drafting
* Delinquent Statement 3rd-Party Print Export
* Bad Debt Export
* CASS Import
* CASS Export
* Integrated Voice Response Integration

**Services**

Services are installed to support interoperability between new world ERP, the eSuite applications, and other 3rd-party applications. Because they are installed separately from the core application and typically on a different server, special attention must be paid to ensure the service is installed correctly and all the components that use a service are working optimally.

* eBill enrollment through eSuite.
* Recurring credit card enrollment through eSuite and the back office.

**Licensing Configurations**

Some common licensing configurations may apply to your situation. Review this list and act on any item that applies.

* If not licensed to Human Resources, test Work Order Employee functionality.
* If not licensed to Financial Management, test Revenue Collections and journal creation.
* If not licensed to Work Orders, test meter exchange, meter set, and meter removal.
* Regardless of licensed components, Device Inventory and Device Type display on menus; Meters, Meter Type, and Meter Inventory do not display.

**Custom**

Tyler tests only the standard interfaces, processes and reports that are supplied with the software. It is important that you review your list of custom items and test each one, regardless of who initially developed it.

* Test any custom interfaces, processes, or reports.
* AMI Remote Meter Control Interface.
* AMI Synchronization Interface.
* If you are using the 3rd-Party Document Imaging Interface functionality in Utility Accounts, test to make sure documents are still accessible.