eSuite 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.

**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.

* Browse to the websites: Ensure each web site (eSupplier, eUtilities, eEmployee, etc.) is up and accessible.
* Email: Confirm that email notification is working for the users.
* Administration: Log on to the administration page, create a new user, add and view some custom content.
* Payments: Make a payment using the ePayment feature and make sure to look in new world ERP Revenue Collections for the receipt.
* Process a permit, including paying for it.
* Process your various business licenses, including paying for them.
* Test all of your standard steps involved in the Code Enforcement process.
* Add and update a parcel.
* Test all of your standard steps involved in the Request for Service process.

**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.

You also should test the updated forms. To do so, you will need to reconfigure your forms using the new format.

* Print a paycheck stub.
* Print a license.
* Print a permit.
* Print a purchase order.
* Print a 1099.
* Print a W-2.
* Print a 1095-C.
* Print a utility bill.

**Services**

Services are installed to support interoperability between new world ERP, the eSuite applications and other third-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 of the components that use a service are working optimally.

**Note:** eSuite relies solely on the availability of Services and Websites properly configured to access new world ERP database information; therefore, given the flexible nature of the eSuite configurations and environmental options, we highly recommended that you test each application in your unique setting. See the Application Testing section below for more details.

**Note:** Since the fee service no longer is called, you will need to test the area where fees are calculated.

**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.

* Each server configuration is unique for eSuite; therefore, check accessibility between servers when using a multi-box configuration, inside or outside DMZ, etc.
* Test any custom interfaces, processes or reports.

**Application Testing**

**Administration**

* Create an admin user.
* Verify that the ePay Settings are still correct based on your configuration.
* Verify custom content entered as HTML is correctly reflected for each site on the front end.
* Verify all administration pages.

**eEmployee**

* Create an eSuite user from the eSuite Administration page:
	+ Change the eSuite user password from the eSuite Administration page.
	+ Create a new employee from the employee self-service portal with email confirmation.
* Verify that all My HR pages display correctly:
	+ Accruals
	+ Benefits
	+ Contacts
	+ Deductions
	+ Dependents
	+ Direct Deposits
	+ Pay Checks
	+ Pay Rate
	+ Personal Information
	+ Positions
	+ Taxes
	+ Print W-2s
	+ Print 1095-Cs
* Submit new contact, dependent, direct deposit and updated personal information. Approve change requests in new world ERP, and verify the change in eSuite.

**eTimesheets**

* + Verify that the Timesheet page displays.
	+ Verify accrual balances.
		- Verify employees are prevented from submitting time if balances are insufficient.
1. Submit time for the pay period.
2. Verify that the Timesheet Approval page displays (based on security).
3. Edit submitted time.
4. Approve submitted time.
5. Export approved time.
	* Export all.
	* Export new.

**eBenefit Enrollment**

* Verify that the multiple open batch scenario and, if applicable, previous enrollment elections display correctly.
* Save enrollment elections and verify that dependents and beneficiaries pages are correct for the appropriate plan/options.
* Save enrollment elections and verify that per payment calculations are correct.
* Submit enrollment elections.
* Print enrollment elections.

**eTime Off Request**

* Submit a time off request.
	+ Verify accrual information is correct.
	+ Verify the My Requests page displays correctly.
	+ Display request details.
	+ Cancel an existing request.
	+ Approve, reject and cancel requests in .NET.

**eRecruit**

* Verify that the Jobs List is correct.
* Verify that the Job Details display.
* Step through the Job Application Wizard to make sure it moves from section to section.
* Check that the application successfully submitted to new world ERP:
	+ Verify that the applicant request queue/approval process creates the applicant.

**eRequest (HR Portal)**

* Submit a request and verify that a request is created in new world ERP.
* Search for a request.
* Edit a request and verify that the modifications are reflected in new world ERP.

**eRequest (external)**

* Submit a request and verify that a request is created in new world ERP.
* Search for a request.

**eMiscellaneous Billing**

* Create an eSuite user from the eSuite Administration page:
	+ Change the eSuite user password from the eSuite Administration page.
	+ Create an eMiscellaneous Billing account from the employee self-service portal with email confirmation.
* Print a summary of open invoices.
* Verify that all eMiscellaneous Billing pages display correctly:
	+ Summary
	+ Account Info
	+ Invoices
	+ Transaction History
	+ Shopping Cart
	+ Email Enrollment
	+ Credit Card Enrollment
* Make a payment with your credit card provider and verify receipt for payment.

**eUtilities**

* Log in to an account.
* Verify that all pages behind the menu options appear.
* Verify that when a payment is made for a utility bill:
	+ Payment reaches your service provider (e.g., Authorize.NET).
	+ A receipt is created in Revenue Collections.
	+ The bill payment is complete.
* Browse a utility account, look at the consumption graph and view a bill.
* Verify that user can sign up for eBilling (if available).
* View an eBill from the email link.

**eLicense**

* Log in as a licensee with open renewal to verify authentication.
* Verify that fee calculations function correctly.
* Verify that when a payment is made for a license renewal:
	+ Payment reaches your service provider (e.g., Authorize.NET).
	+ A receipt is created in Revenue Collections.
	+ The license renewal is complete.
* Print a receipt.

**ePermits**

* Create a contractor.
* Verify that the Permit List displays correctly.
* Verify that the Permit Detail List displays correctly.
* Request Permit:
	+ Displays correctly in eSuite.
	+ Displays correctly in new world ERP.
* Instant Permit:
	+ Request an instant permit.
* Verify that when a payment is made for a permit:
	+ Payment reaches your service provider (e.g., Authorize.NET).
	+ A receipt is created in Revenue Collections.
	+ The permit issuance is complete.
	+ Print an instant permit.
* Print a receipt.
* Log in with residential user credentials.

**eSupplier**

* Create a supplier user.
* Log in and verify that all pages display all information and the searches return the correct data:
	+ Dashboard
	+ Purchase Order and Purchase Order Detail
	+ Item and Item Detail
	+ Invoices and Invoice Detail
	+ Payments and Payment Detail
	+ General Information
		- Submit a change request. Use Vendor Change Request to verify that the change request is created in new world ERP.
* My Account
* Print a purchase order