Release Preview Test Plan for OpenAir

The Release Preview Test Plan includes the following sections:

- Overview of Release Preview
- Preparing for Testing
- Recommended Test Plan

Test Plan Template Available for Download

Download the Release Preview Test Plan Template to create your workflow test plan. This Microsoft Excel worksheet includes a Testing Matrix, Workflow worksheets, and examples. After downloading the file, modify it to suit your testing needs. ReleasePreviewTestPlan_Template.xls.

Overview of Release Preview

The Release Preview environment enables you to become familiar with the new features in an upcoming release. You can verify that your existing business workflows function as expected before the upgrade to your production account.

Our goal is to provide a smooth and seamless transition to a new release. We hope that by making this information available, working with you to ensure you perform the recommended tests, and providing other needed guidance, we will avoid any major problems or surprises when you go live with the new version. Please remember that changes in your release preview account will not be reflected in your Production account. Your Release Preview account will be destroyed shortly after the Production release occurs, and it cannot be restored. Additionally we do not support refreshing of Release Preview accounts during the preview period. Note that as with your Production account, most features are not enabled automatically with a new release. Whether or not you need to contact our Support department to enable a new feature will be outlined in the Release Notes / Sneak Peak for the release.

To help you get the most out of your Release Preview, review the following topics:

- Preparing for Testing includes the following sections:
  - Accessing Your Release Preview Account
  - Functionality Available for Testing
  - How to Report Issues
- Recommended Test Plan includes the following sections:
  - Test Critical Business Workflows
  - Test Critical Reports

Note: Performance in your Release Preview account will not be on par with your production account. You can expect that performance will be a bit slower than Production. For performance expensive operations, such as testing large reports, we strongly advise that you either leverage your Sandbox account if you own one (which will also have the new release during the Preview period) and/or ensure that you reduce the size of the reports by limiting the data it uses, especially by shortening the date range of the report to one day or one week (without ITD designation). Release Preview is intended for testing the functionality of new features, not as a performance measurement tool for the new version.

Preparing for Testing

Download the Release Preview Test Plan Template to create your workflow test plan (optional). This Microsoft Excel worksheet includes a Testing Matrix, Workflow worksheets, and examples. After downloading the file, modify it to suit your testing needs. ReleasePreviewTestPlan_Template.xls.

Important: Read the Sneak Peeks and the Release Notes so that you have time to review new or changed functionality well before the release.

To prepare for testing in Release Preview, review the following sections:

- Accessing Your Release Preview Account details how to access your Release Preview account so that you can familiarize yourself with the new features and changes in this release.
- Functionality Available for Testing contains a table of the features that can be tested in Release Preview.
- How to Report Issues explains what to do if you encounter an issue.
- Test Critical Business Workflows explains how to document your critical daily workflows to help you create tests that ensure you will not encounter anything unexpected when your account is upgraded to the new version.

Accessing Your Release Preview Account

To access your Release Preview environment:

1. Go to https://preview.openair.com/index.pl
2. Log in using your usual Company ID, User name, and password.

Note: The Release Preview environment is separate from your OpenAir production environment. Use Release Preview only for testing. Be sure you are logged in to your OpenAir production account when you are performing your daily business activities.

Note: SAML/LDAP/AD is not supported on Release Preview. If you authenticate using one of these, you must ask an Administrator to reset your password, and login through our web application form.

Note: 'Forgot my company id/user name' and 'Reset my password or unlock my account' is not supported on Release Preview.

Functionality Available for Testing

The following section describes functionality available for testing in the Release Preview. Only modules that you have purchased and enabled in your production account will be available in your Release Preview. Be sure you understand the limitations of the Release Preview environment. The following functionality is **NOT** supported on Release Preview accounts.

Note: Omission here does not guarantee availability. If you are especially interested in using some of this functionality in Release Preview, please open an Enhancement Request as that will help prioritize future efforts here (see the section on 'How to report Issues in Release Preview').

Integrations
No integrations are supported. This includes the OpenAir/NetSuite integration, any custom API, integrations leveraging Integration Manager/OA Connect, etc.

Thin Clients
iPhone, Android, Offline, Outlook Connector, MS Exchange Manager, and MS Project Connector.

Scheduled Events
Anything running at a 'specified time'. This includes Automatic Backup Service, auto-billing, scheduled reports, scheduled alerts, scheduled scripts, leave accrual runs, charge projections. This also includes nightly foreign currency updates for multi-currency accounts.

Note: Jobs which allow a "manual" run can be run manually, such as charge projections and leave accrual, unless otherwise specified as not supported. The OpenAir/NetSuite integration is not supported.

Email
No emails are sent from release preview accounts for any activity.

SSO
SAML and LDAP/Active Directory authentication are not supported.
Note: Users who have SSO enabled in production will not be able to access Release Preview unless their password is reset in the account by an Administrator or other user with access and permission to do so.

Forgot Password
The forgot password functionality on the login page is not supported in your Release Preview account.

Account Refreshes/Retention
Your release preview account cannot be refreshed from your production account during the preview period. The release preview account is only available during the preview period and will not be available after your account is upgraded to the new release. Data and configuration changes made in your preview account cannot be transferred to your production or sandbox accounts.

How to Report Issues

Report any issues you encounter during testing by calling NetSuite Support or by submitting a case online. Release Preview for OpenAir is not connected to the production instance of SuiteAnswers. You will need to submit online cases from your Production account.

To submit a case:

1. Go to the Support tab of your Production account.
2. Click the **Visit the SuiteAnswers Site** link.
3. Click the **Contact Support Online** link and provide details of your issue.
4. Please make sure to indicate in the Case that you encountered the problem or question in your Release Preview account, not Production.

Recommended Test Plan

Download the Release Preview Test Plan Template to create your workflow test plan (optional). This Microsoft Excel worksheet includes a Testing Matrix, Workflow worksheets, and examples. After downloading the file, modify it to suit your testing needs. ReleasePreviewTestPlan_Template.xls.

The following sections provide a plan for thoroughly testing your account in Release Preview:

- Test Critical Business Workflows explains how to document daily workflows, and provides a link to a sample test plan.
- Test Critical Reports

Test Critical Business Workflows

In order to test successfully in Release Preview you should identify, document, and test the key business workflows) in your production account. Testing and finding/reporting issues in your critical workflows (and reports) is the most important aspect of Release Preview. Compile a list of the critical task paths your employees follow to get their jobs done and create a document for each process. We recommend that you use a spreadsheet application and create a separate worksheet for each common daily task. This is not required, and the actual testing is more important, however this may help you be more efficient and organized with future Release Preview testing. Use this spreadsheet as your checklist during testing.

Download the Release Preview Test Plan Template to create your workflow test plan (optional). This Microsoft Excel worksheet includes a Testing Matrix, Workflow worksheets, and examples. After downloading the file, modify it to suit your testing needs. ReleasePreviewTestPlan_Template.xls.

At minimum, each business workflow documented should contain the following components:

- **Business Workflow Name** – Provide a unique name.
- **Role** – Specify the role to use when testing the process.
- **Email** – Specify the email address to use for testing.
- **Steps** – Provide the detailed navigation required to accomplish the desired task.
- **Results** – List expected results.

Whenever possible, try to incorporate users with different Roles who leverage these workflows (e.g. Finance, Project Manager, Resource Manager, Consultant/End User.), rather than testing only as an Administrator. If it is impossible to procure those resources for testing, try using the Proxy/Log-in as feature to test 'as them'. You may find critical bugs that only impact those non-Administrator roles.

Note: We understand that some critical workflows may involve features listed as unsupported and we apologize for their unavailability on Release Preview.

The critical workflows will differ from customer to customer. Below are some suggested areas for testing, some of which may not be applicable to your account. You may have critical workflows not listed here.

- Timesheet entry
- Expense entry
- Approvals (approve time, expense, invoices, etc.)
- Billing/invoicing (run billing for a project, create an invoice)
- Creating/updating bookings/staffings
- Viewing/creating/updating bookings/staffings on the chart, worksheet, or planner.
- Creating/updating project plans/tasks/task assignments
- Run charge/revenue projections (manually). Make sure they are generated properly (via a Report – see next section on Report testing)
- User event scripts (on any form, for those customers using our scripting platform)

Test Critical Reports

Important: The Release Preview environment is not designed for production level usage and data processing. Reports which typically run longer than 5-10 minutes should **not** be run on Release Preview 'as is', or you will likely see a dramatic decrease in the account performance while the report runs. Large reports can be easily manipulated to look at a single day or otherwise limited data set. Additionally, following these guidelines will help ensure that you do not waste time investigating or reporting issues that result due to new/updated data in your production account which is not reflected in your Release Preview account.

These steps are recommended for all reporting testing, not just for large reports.

1. Identify the reports you wish to test.
2. Modify the report.
    a. Change the DATE filters such that the report period is only ONE day or ONE week.
    b. Specify a time period that has updated data in production. For example, pick a date 6 months ago.
3. Save a copy of the report, and run it. Download it to CSV and retain that copy locally.
4. In your production account, run the report with the same date range that you used in release preview. Compare the results.
5. If you need to report an Issue to Support, make sure to keep the copies of both saved reports.
    a. You may want to keep this manipulated report in your production account, as it will save some steps for you for the next release preview.

Important: Do NOT compare a Release Preview account report with a report from SANDBOX, as both release preview and sandbox accounts are on the new version during the preview period.

Important: Release Preview is a copy of your production account as of a certain date, so the data in it may not be the same as in your production account. We recommend that you generate reports using date ranges that can be compared between both accounts. Please note that we do not support refreshing or recreating of release preview accounts.