OnBase Guide - Using the Upgrade Testing WorkView Application

Goal: To track testing progress and outcomes when performing an OnBase version upgrade

Complexity Level: Departmental Administrative Users and Testing Participants

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Background

An OnBase upgrade is completed periodically to install the newest version. For more information about OnBase upgrades, refer to the [Certified Admin Handbook](#).

In order to track upgrade testing progress and outcomes, a WorkView application has been developed for use by all users and departments involved in the testing process. The application can be accessed in the **production** Unity or web client while you perform testing in a **non-production** environment (usually DMODEV). As you complete testing of each item on your department's test plan, you can enter the outcome (i.e. Pass, Fail, Retest, N/A) and any comments.

Since we have a limited number of WorkView licenses, please leave the application whenever you are not actively using it.

Terminology Used in this Application

- **Test Item Definition** - a description of a function that needs testing (what client to use, the category, the steps to complete to test). These are re-used for each upgrade.
- **Test Item** - this is a specific instance of an item to be tested for a certain upgrade project and test group. This is where the result/outcome is recorded.
- **Test Group** - a department or equivalent group that will be involved in testing for a certain functional area at a certain campus
- **Tester** - a user assigned to a test group who will perform testing
- **Department Test Plan** - a collection of test items for a certain test group and upgrade project
- **Upgrade** - a project to upgrade to a new version. When a new upgrade is started, a department test plan will be created for each active test group.
- **Build** - a specific software build installed in the course of an upgrade

WorkView Terminology

- **Application** - a solution built in WorkView consisting of classes, filter bars, etc.
- **Class** - a type of WorkView object (ex. Test Item, Test Group, etc.). Classes have attributes (similar to keyword types on a document type), filters and views.
- **Object** - an instance of a class with attribute values
- **View** - a defined layout to display an object's attribute values. When you open an object, it may have more than one view. They will appear as tabs across the top of the window.
- **Filter** - a query for objects that meet predefined or user-entered criteria. Filters can also be embedded in a view to show related objects.
- **Filter Bar** - a collection of filters

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Accessing the Application

Unity Client

1. Log in to **PRD** Unity client.
2. Go to File > Applications > S - UIS - Upgrade Testing.
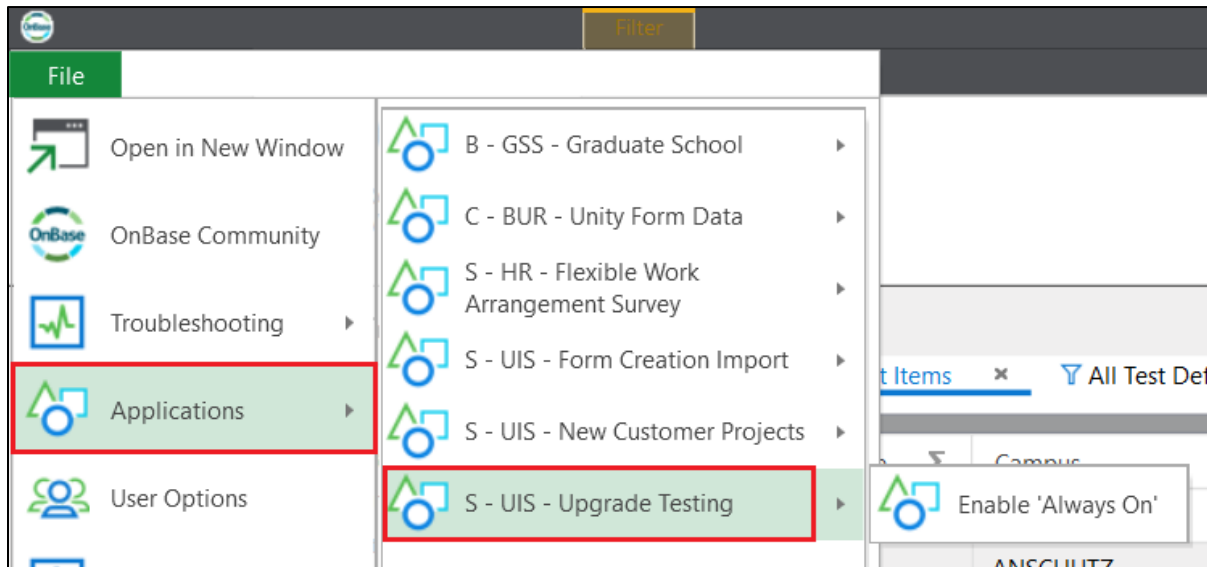
The "Enable Always On" option will keep a tab for the application active in the menu ribbon.

Filters and objects can be added to your personal page, and filter settings can be customized. For more information about using WorkView in the Unity client, refer to the WorkView MRG (for version 18, page 68: *WorkView | Case Manager Unity Client Usage*).

An overview of WorkView usage is also available in Section 6 of End User Essentials: OnBase 18 Unity Client (6 minutes).

Web Client

1. Log in to **PRD** web client.
2. Expand the main menu and choose Open WorkView.
3. Choose the application from the list of applications you have access to.

Clients

The web and Unity clients are available as usual.

OnBase Web URLs and Unity Client ClickOnce URLs.
OnBase - Home (sharepoint.com)

Launching the Unity client will prompt for install of the upgraded version.

You will need to use the provided clients for your testing in other clients (thick, Configuration, Studio, UMC, etc.). **Do not use the OnBase clients in the zip file for any OnBase environments (PRD, TST, and until just prior to the upgrade, STG) that have not been upgraded.** Only use them for testing in the upgraded environment(s).

The URLs are also available on the Links/Client Links views in the application, for example from a Test Item:

Or from a Test Plan:

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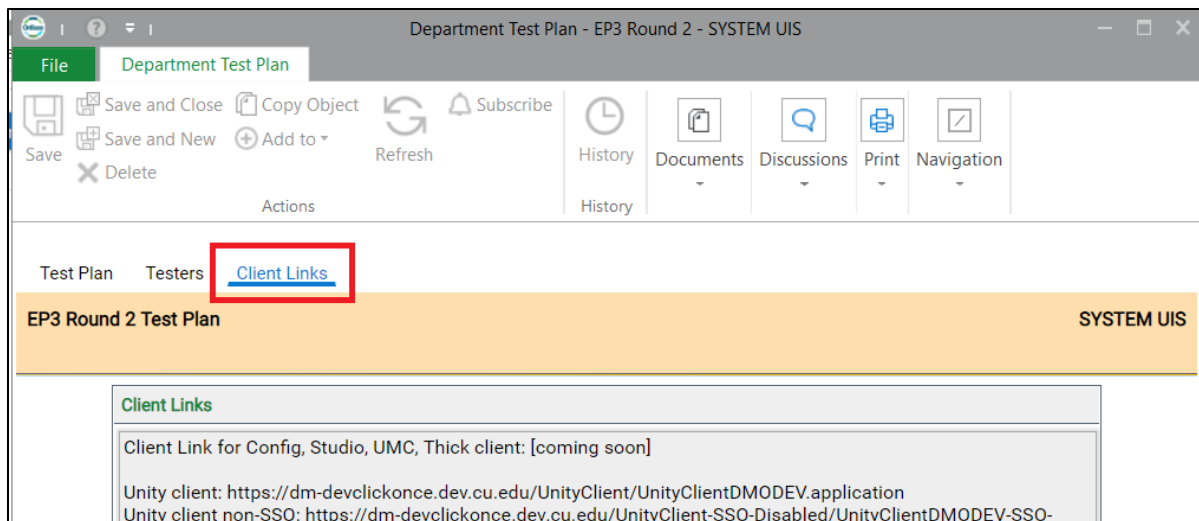
Your Department's Test Plan

The following filters are available in the **S - UIS - Departmental Testing** filter bar. When viewing results for any of these filters, you can filter, sort and/or group by any of the column headings to locate specific items.

My Group's Test Items

When you open the application, the default filter (My Group's Test Items) will display. This is a list of all test items for the test group you are assigned to and are related to the current upgrade.

From here, you can open each test item object to view the details and enter your testing result.

On the Links view tab of an open Test Item object, you can find the client links to use for testing.

My Group's Incomplete Test Items

This is a list of all test items for your test group and the current upgrade that do not have a Result attribute value of Pass, Fail or N/A entered.
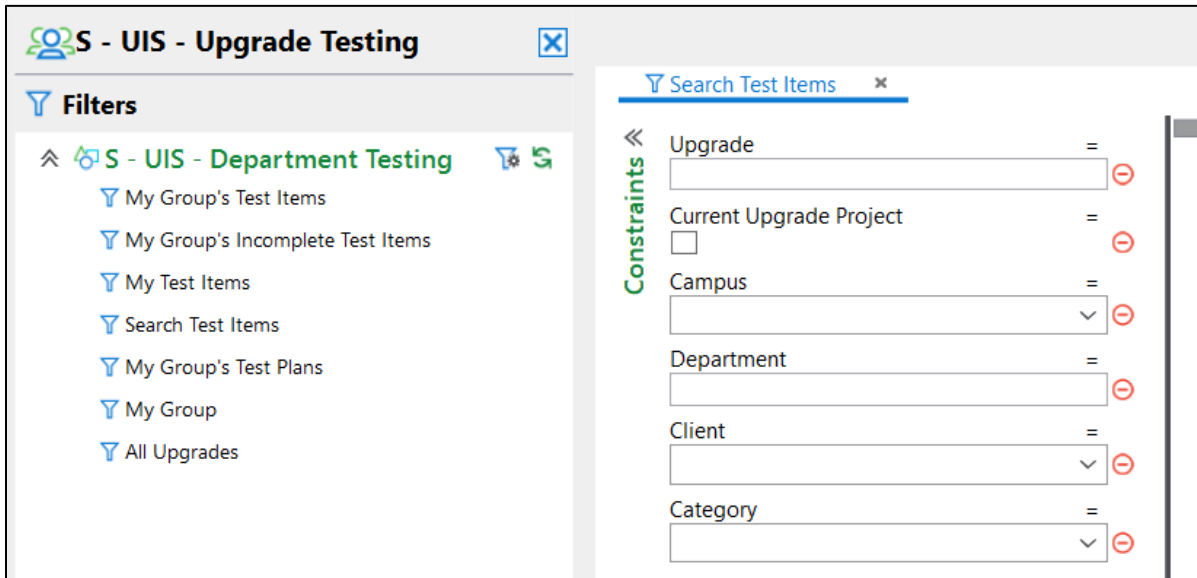
From here, you can open each test item object to view the details and enter your testing result.

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My Test Items

This filter will show items that you personally have already completed testing for (your username is entered as "Tested By") for the current upgrade.

Search Test Items

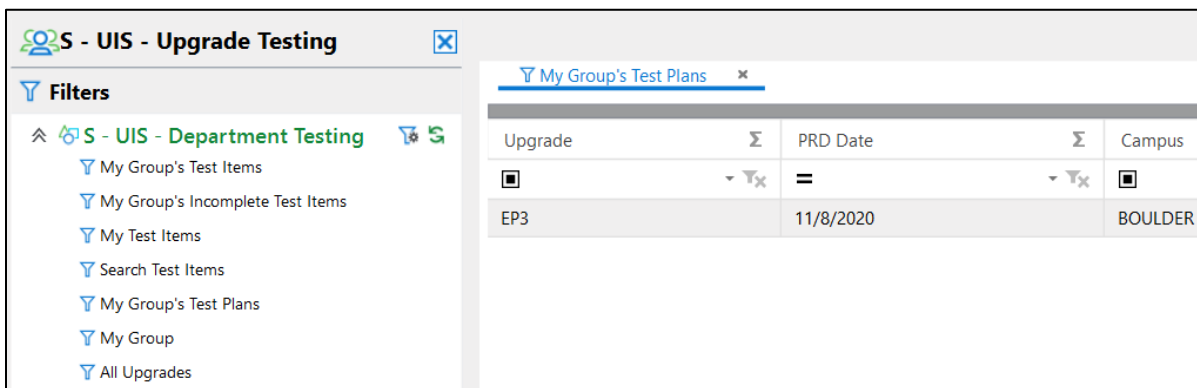From here, you can search all test items from all upgrades and test plans by attribute values.

My Group's Test Plans

This will show a list of all current and prior test plans for your assigned test group. From here, you can open the test plan which will include a list of test items for that plan in an embedded filter. Here you can also find the links to the clients to use for testing (on the Client Links view tab), along with important upgrade dates.

My Group

This will bring you to the object for your group, where you can also expand the subfilter for a quick view of the users in your test group.

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All Upgrades

From here, you can view upgrade objects for an overview of testing progress. The schedule and client links (on the Client Links view tab) are also available here.

Entering Testing Results

From a filter with a list of test items or from your department test plan object, click a test item to open it.

After testing the item, enter the result in the drop-down list.
- Pass - testing was successful with no issues
- Fail - testing failed or could not be completed (Notes will be required)
- Retest - testing needs to be completed again
- N/A - if test item is not applicable

Once the result is entered,
- the environment will be set to DMODEV
- the current user's username will be filled as the "Tested By" user.
- Date Tested will be set to the current date.

These values can be changed if needed.

Enter notes if desired (required if test failed so that further research can be done to determine the cause and/or severity of the issue).

In the menu, click **Save** or **Save and Close**.

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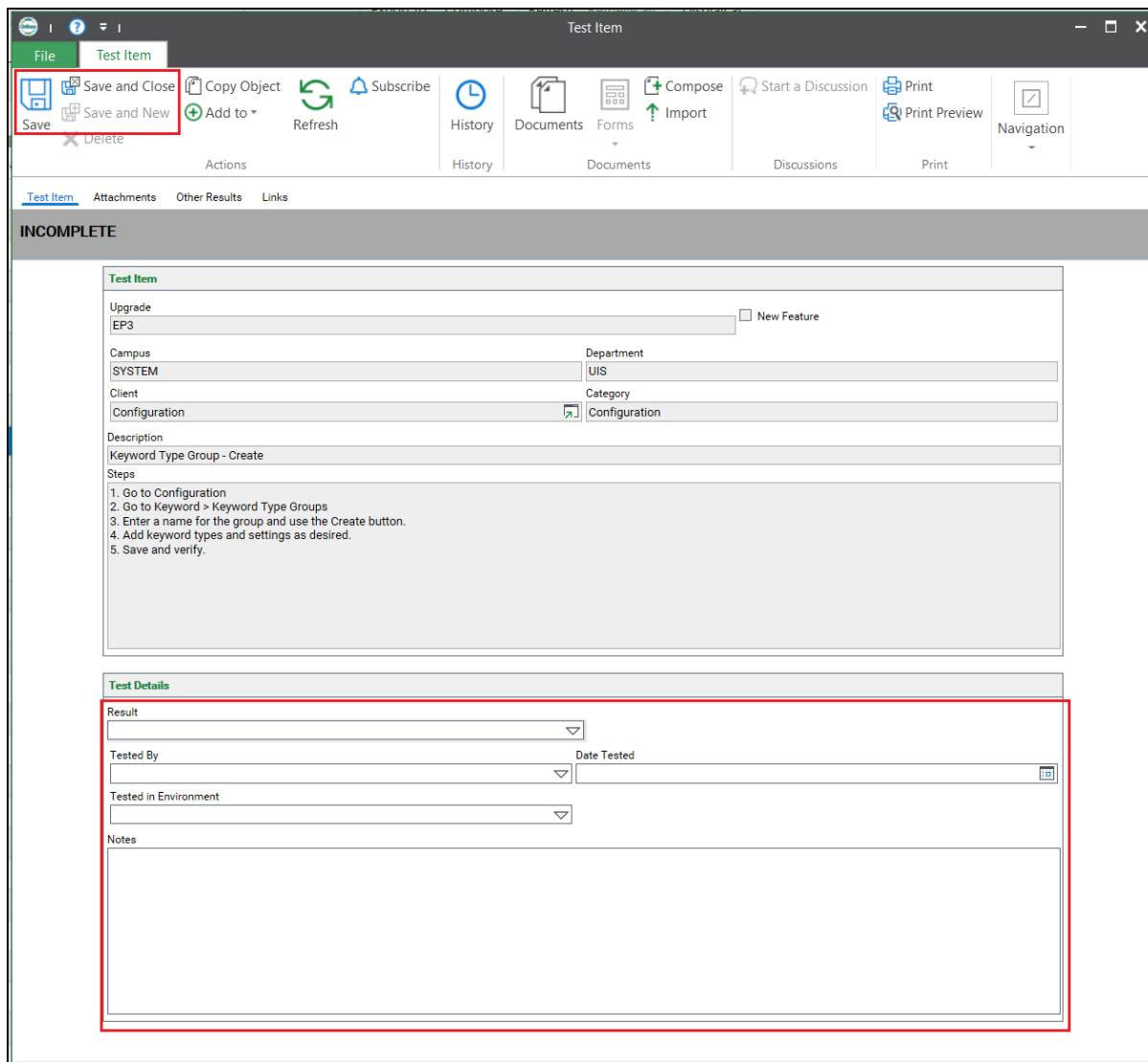
The build number will be filled by workflow after the object is saved.

Adding Attachments to Test Items

If you would like to provide additional information about a test item, such as screenshots, that can be done by importing attachments. There are two ways to add attachments to Test Item objects:

1. Go to the Attachments view and drag-and-drop the file(s) onto the folder.
2. Use the Import button in the object menu.

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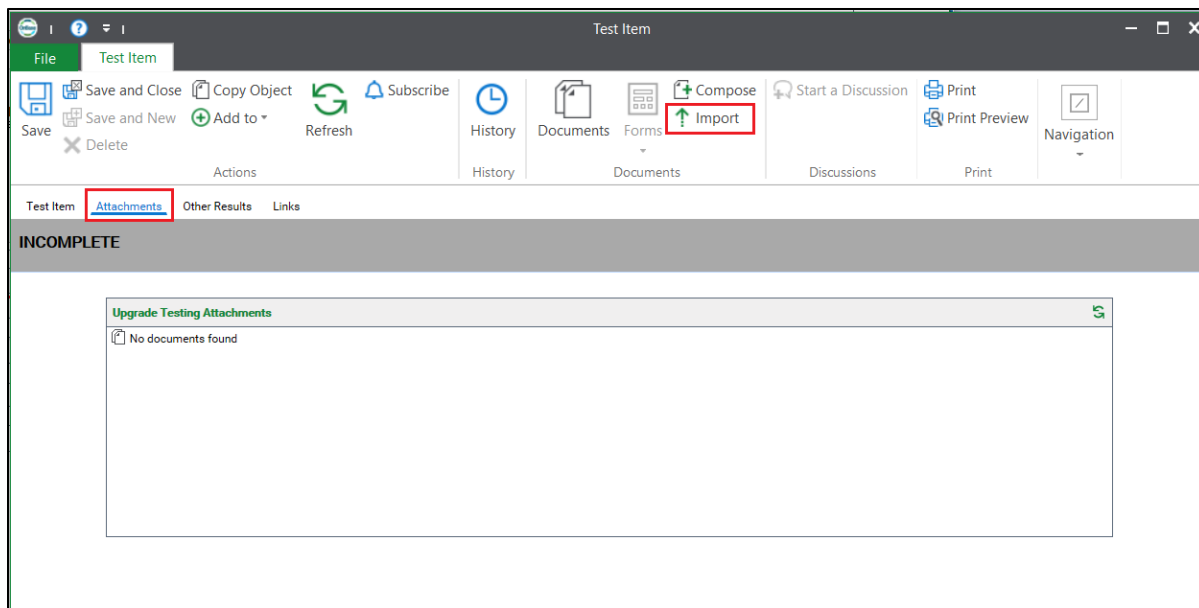
With either method, the correct document type will already be selected and the Object ID for the Test Item will be pre-filled as a keyword value to associate the attachment with the correct object. You can enter a brief description to include in the document name.

Any attachments associated with the object will appear in the folder where you can select them to open and view the document.

Signing Off on your Test Results

When you are done with your testing and comfortable to proceed with the upgrade, check the box to complete the sign-off for your department. Your username and the current date will be filled in.

Testing "Non-Standard" Items

Some test item definitions are used to create test items for all test plans when a new upgrade is started. Others are not applicable to all departments depending on

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access or module usage. These "non-standard" items are assigned to the appropriate test groups for inclusion on test plans for that group.

Using the **My Group** filter, open the object for your group and navigate to the **Non-Standard Items** view. Click the "Add to List" button to open a list of available test items. Select any that apply to your group then choose Select.
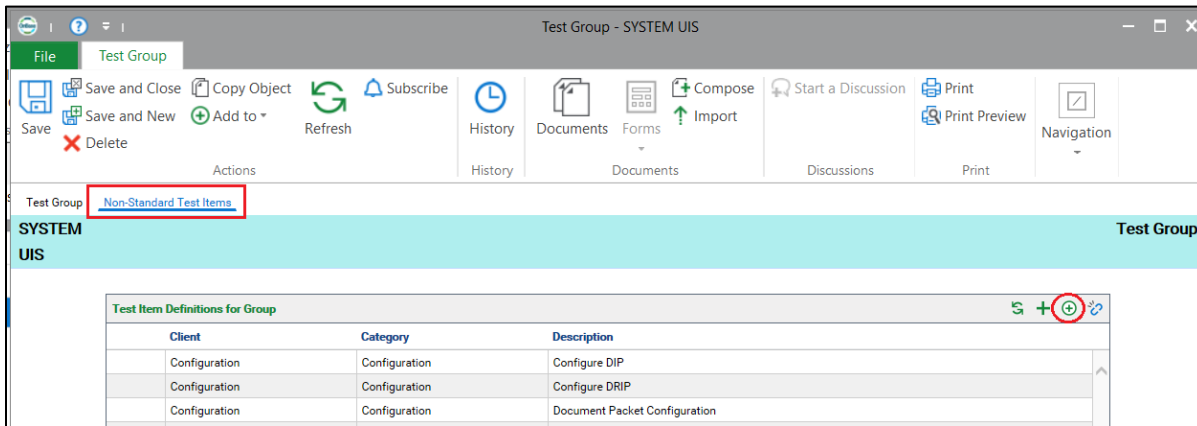

The selected items will appear on any active test plan for your group (this may take a few minutes for workflow processing to complete) and any future test plans created for your group will include all non-standard items assigned to your group.

To remove test items from the list for your group, click the "Remove from List" button. This will not remove test items already on your current test plan, so if needed mark them as "N/A" as the result. Any future test plans will not include the removed item.

Creating New Test Items

If you have additional test items that are not already defined in the standard or non-standard test item definitions created by UIS, they can be created manually (or you can contact UIS with suggestions).

From the application tab (S - UIS - Upgrade Testing), choose Create > Test Item Definition (you may need to expand the list of classes available for object creation).

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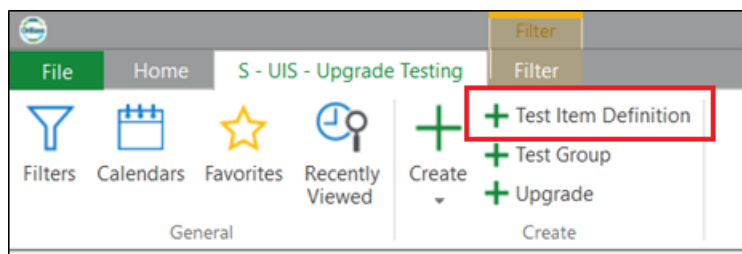
When a new object is created in this class, fields are editable that will be read-only after creation. Enter the details of the test item (ex. Client, Category, Description and Steps).

By default, the test item will be marked as **Active** (meaning it is currently relevant and should be included in test plans). Prior to being added to any test plans, the item will be reviewed by UIS.

If you feel that the test item definition does not apply to all departments and should only be tested by your department (or other departments using a certain function), mark the "**Non-Standard**" checkbox. If this is not checked, the definition will be used to create test items on all active department test plans (if approved by UIS).

If you selected "Non-Standard", <u>after saving the definition</u>, assign your test group to the definition as described in the <u>Testing "Non-Standard" Items section.</u> Otherwise the item will not be added to your test plan.

If the definition is related to functionality that is new as part of the upgrade (does not currently exist in our production version), mark the "**New Feature**" checkbox.

Save the object when you are finished. It will be routed to workflow for processing.
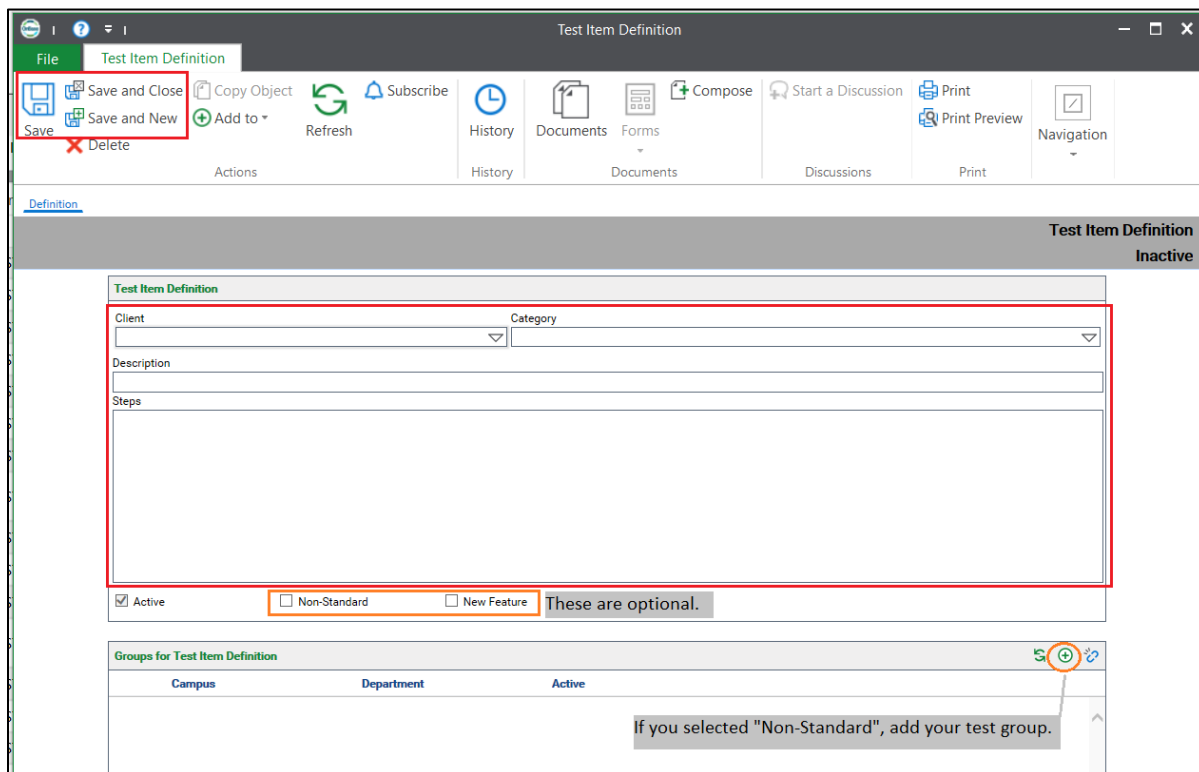
Reviewing Results

From your department's test plan object, you can see a count of total test items and the count of passed and failed tests. In the embedded filter, you can review the list of items for that plan and the results that have been entered.

With a test item for your group open, you can go to the "Other Results" view and see the testing results for that item from other departments.
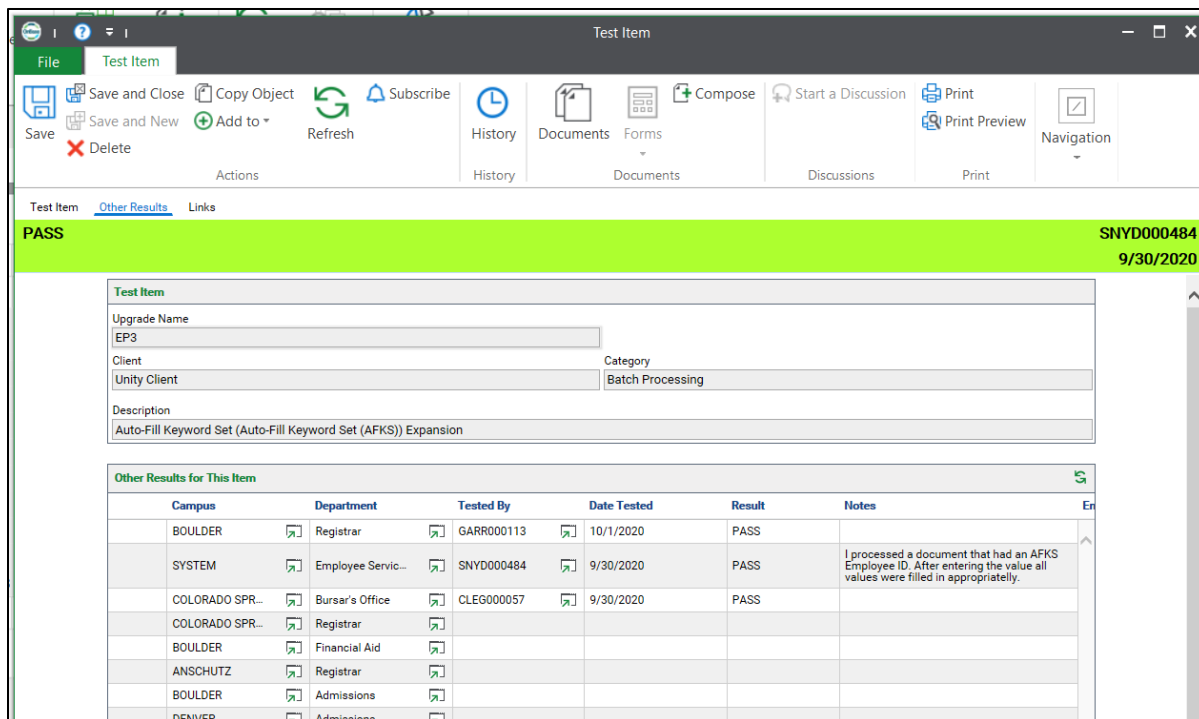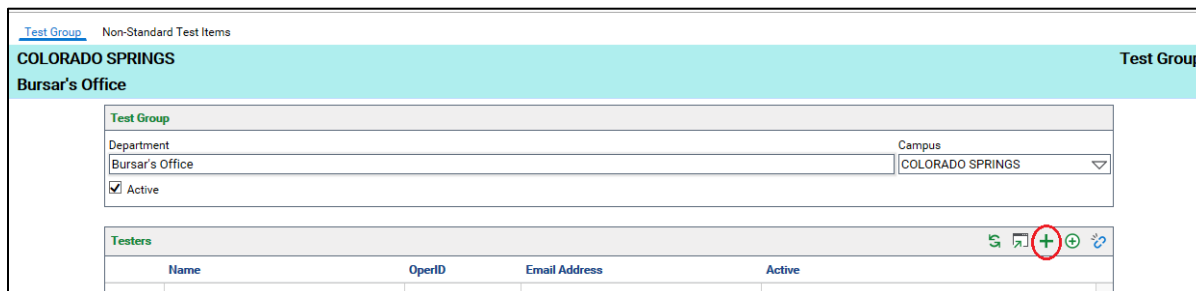
Or you can use the **My Group's Test Items** filter to view all items and filter/sort/group based on result.

Adding Testers for your Department

Using the **My Group** filter, open the object for your group.

If re-assigning a tester from another group to your group, use the "Add to List" button.


Find the user in the list. Adding them to your group will remove them from the group they were assigned to (if they were assigned to a group).

If creating a new tester, use the "Create Object" button.

Enter their OnBase username (OperID), name and email address. They will need to already have an OnBase account and access to the configuration items they should test (in the environment used for testing, typically DEV).

Mark the box to make the tester active. Then save. The tester should now appear in the list of testers for your group.
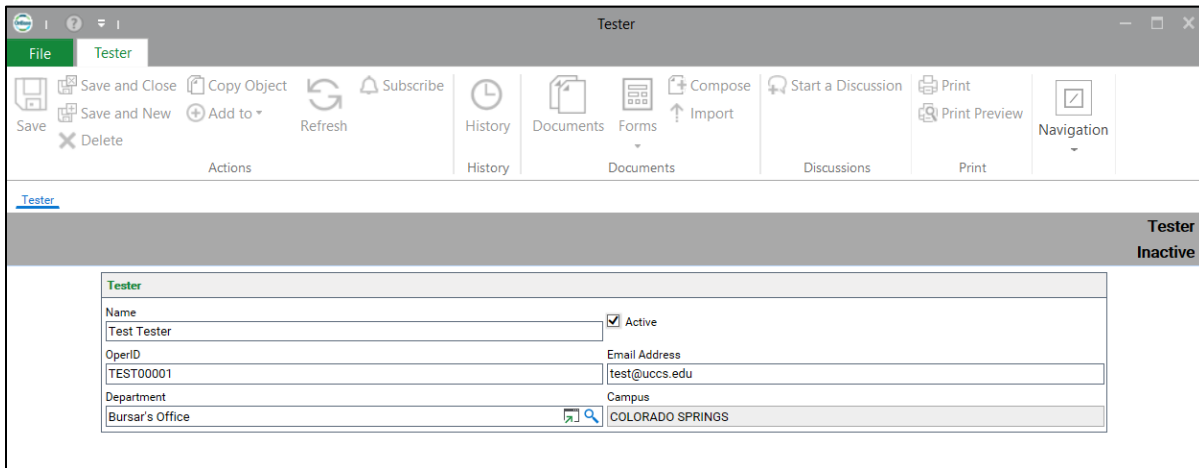
The new tester object will be routed to workflow for processing. Within a few minutes, the user (based on the OperID entered) should be added to the necessary user groups for access to WorkView functionality and the upgrade testing application. They'll need to re-launch their Unity client to see the application.

Keyboard Shortcuts

With an object open:

Shortcut	Action
CTRL + E	Save and Close
CTRL + S	Save
TRL +]	Move to the next view (to the right)
CTRL + [	Move to the view to the left

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