Haplo

How to test

Notes for institutions

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Introduction

Haplo applications are heavily customised for each institution. During the setup process, we will have worked with you to understand your institution, and write a document which sets out our understanding of how your system needs to work.

During the testing process, you're checking that all the customisations work the way you do, and all your business rules are applied by the system.

As well as the custom functionality, you need to make sure your data is accurate. Most of the decisions in the system are controlled by the data fed in from your institutional system, and data we've imported, so you need to make sure it's accurate.

You only need to test your customisations and data, but of course, you should familiarise yourself with the standard functionality during your testing process.

We'll provide you with an online spreadsheet to record feedback. Recording everything there will help us deliver the finished application as quickly as possible.

How to test

1. Impersonating users

During testing you will need to impersonate other users. This enables you to check that user permissions have been applied correctly, and to check and progress workflows by impersonating each person in the process. To impersonate,

- Select your name in the top right
- Search for the user you wish to impersonate
- Select their name from the list
- A red banner will appear at the top of the screen when you are impersonating a user
- Select 'Finish' on the red banner to stop impersonating

  After impersonating, the initials of the users you've impersonated appear in circles on the left hand side of the page. Use these to quickly move back and forth between different users during a testing session.

2. Email viewer

Haplo sends email notifications to users at various points during a workflow process. These emails are not sent in the test system, enabling you to test without risking emails being sent.

You can view the text of the emails being sent. If you're impersonating another user, click 'Finish' on the red banner. Then, click on your name in the top right. Select, 'Test email viewer' and open in a new tab. Any emails that would otherwise have been sent by the system during your testing session will display here.

3. Setting up user roles

Where a workflow being tested requires approval by a role such as the Dean, Research Degree Leader or Research Administrators, users should be assigned to these roles before initiating the workflow. Select the School/Faculty/College from the list on the left, click 'Edit' in the top right. Add the relevant users to the correct roles and Save.

Where an application being tested will be routed to a committee, the Committee Representative (Secretary), Chair, and committee members should be added to the committee record before initiating the workflow. Find the relevant Committee by selecting 'Committees' on the left or by selecting the related School/Faculty/College from the list on the left, and selecting the Committee icon at the top of the School/Faculty/College page. Click 'Edit' in the top right of the committee record. Select the Committee Representative, Committee Chair and Deputy Chair (where relevant) and committee members on the committee's record and Save.

4. What to test

Work through your Implementation Plan and flowcharts, checking every function and every variation of every function.

Throughout your system, check:

- is the terminology in the system reflecting the terminology used at your institution
- are instructions sufficiently clear for users
- are user permissions correctly applied.

For PhD Manager, check:

- training and development: organise events; send out invitations; and manage attendance; impersonate a student to test training needs and training plan
- supervision meetings: start meetings as both the student and the supervisor
- project history: check that actions are displaying in the project history

5. Testing data

When testing data, check:

- for duplicate users
- information about users
- for Postgraduate Researchers, compare registration and key stage dates with status - if someone has been awarded their degree or was registered many years ago, is their status completed and their category Doctoral Researcher (past)?
- data imported into the wrong fields
- typing mistakes in data: spelling mistakes, errant commas etc.

When you identify problems, either:
a) improve the data AT SOURCE, don't change the data in the test system or on the export from the test system
b) add a note to the feedback spreadsheet with clear rules where a bulk change can be made to the import to clear up multiple data import problems of the same sort.

6. Testing workflows

Refer to the flowcharts in your implementation plan to see which role starts each workflow.

Workflows start with a guidance page at which point the user confirms they would like to start the workflow. Administrative users can add notes to the guidance page once your live system is deployed.

When testing workflows, check:

- permissions are applied correctly: users can access information appropriate for their role, and cannot access information they should not see. Assessments are normally hidden from the applicant during the workflow, and are only visible to the applicant (and their supervisor) when the final notification is sent, or before if returned for resubmission.
- the text in the emails that are being sent out

- all the variations of the workflows
- whether Postgraduate Researchers registered for different awards are being handled correctly, for example Professional Doctorates should not have the option to transfer and the text in notifications may differ
- project records are updated correctly depending on the application outcome
- check that associated dashboards are updating correctly.

7. Testing dashboards

As an Administrative user, access the dashboards from the right of the home page. Select Graduate School, Ethics, Repository, or another relevant section.

You will find a dashboard for your key stages and processes, which will update as you are testing.

You can filter dashboards. You can export data using the 'Export' option on the top right.

The dashboard will normally only display information for the current academic year. You can navigate to other years by clicking on the arrows around the year displayed in the top right.

8. Feedback

Record your feedback on the spreadsheet provided. Avoid sending separate emails to Haplo as it's easier to track the resolution of all feedback if all issues and any correspondence is listed in the spreadsheet.

You shouldn't need to take screenshots if you provide clear descriptions of the issue. However, where it is easier to send a screenshot, put all screenshots into a single file and email them to Haplo at the end of your testing period, cross referencing to any related issue in the feedback spreadsheet.

Clear, comprehensive feedback will help us make your requested changes faster. When describing the issue include:

- What stage the process was at
- What you did
- What happened

- How that differed to what you expect to happen
- Any Error messages displayed on screen