The
Guide to
Managing Infor
WFM Changes
24/7

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A Letter from Our Co-Founder

Over twenty years ago, my co-founder Marce and I began helping enterprise customers with their Workforce Management (WFM) system go-lives.

Back then, technology moved slower, so you would only have to upgrade your WFM system every few years. When it was finally time to upgrade, we'd see many customers spin up new project teams. Unfortunately, those teams would struggle to understand how their WFM system worked and where to begin their testing efforts.

Many of those customers looked to us to develop a Quality Assurance (QA) plan. Paying their employees incorrectly wasn't an option, so they'd spend significant time, effort, and money to mitigate the risks. However, as soon as the project ended, the team members would move on to their next assignments, and their QA documentation would start collecting dust. Worst of all, business stakeholders would find themselves in the same position again, i.e., afraid to make any changes to a WFM system that they didn't understand until it was time for the next upgrade.

Around 2012, as Agile methodologies became more prevalent, enterprise organizations began to prioritize the speed of testing over the cost. The need for an organization's HR systems to become more responsive to changing market demands and ever-changing labor laws created a need for faster releases, regular updates, and more frequent testing cycles. Unfortunately, most customers still didn't have the processes and technology to release more frequently without extensive and costly testing cycles.

By 2014, because of our decade of experience seeing immense success with a structured testing approach, Marce and I were uniquely positioned to help these WFM customers. The pace of constant change meant that organizations now needed to conduct more testing, more often and within a limited time window. We had a vision of empowering our customers to deliver updates and make production changes faster while ensuring that absolutely no WFM mistakes would impact people's pay or create compliance issues.

Some years later, as customer's embraced cloud technology for their HR Solutions, the need for more frequent testing became even more critical. Not only did WFM customers now need to validate multiple pay-impacting software releases every year, but they also had to keep pace with the social and legislative changes that were coming their way. Fortunately, TestAssure.ai (our automated testing platform) was ready to help Infor customers successfully manage multiple releases per year while ensuring their employees were paid correctly.

Fast forward to this moment, where we feel it's more critical than ever to provide all WFM customers with the foundations for success. We work alongside some of the top Fortune 100 brands and understand the challenges of managing WFM systems in the most complex and fast-moving global enterprise environments. Best of all, we're proud to have worked with both our customers and WFM providers to lower the costs of automated testing technology and reduce the burden of testing for all types of customers – large and small.

The purpose of this guide is to:

- **Introduce and help you understand a proven approach to making changes in production with confidence,**

- **Give you the information you need to implement an effective Continuous Testing**

- **Let you know that there is an automated continuous testing solution available for Infor WFM customers. You can start using it immediately with zero setup and reduce your manual testing effort by up to 90%.**

Armed with this information, you will be able to make better decisions based on your distinct organization, budget, and risk profile. We hope that this guide provides assistance, relief, and a helping hand that enables you to move faster and with more confidence.

We're humbled to support you in your journey.
Sincerely,

Heiko Roth
COO and Co-Founder

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Chapter One

Managing WFM Changes 24/7 is the New Normal.

Congratulations! You've worked hard to implement Infor Workforce Management (WFM), and your organization is now poised to reap the benefits and value from this state-of-the-art WFM solution. But even though your implementation has ended, the changes coming your way have not.

You now must be prepared to respond to changes 24/7, 365 days a year.

Why You'll Have to Make Constant Changes to Your Infor WFM System

There are many reasons why HR teams would need to make, or accept, changes to their WFM system. These changes are typically grouped into three types: compliance-driven, business-driven, or Infor-driven:

COMPLIANCE	BUSINESS	INFOR
> Federal, state, municipal & city-specific labor law changes > Adherance to union contract	> New corporate policies > Business process improvements > Opening new locations > Acquisitions, mergers and divestitures of locations or business units > COVID-related operational changes > Location closures and/or disaster pay	> Infor WFM Cumulative Update (CU) > Infor WFM Cumulative Patch (CP) > New Features > New Functionalities

Unfortunately, the timing of many changes is frequently not under your control, and you may have to rush to release the changes to your production environment at inconvenient times for your business. These critical and pay-impacting changes often require significant time from your most-valued and in-demand subject matter experts (SMEs).

Each change can create new errors, introduce new defects, and break existing functionality, leading to business disruption and mistakes in your employees paychecks.

> **!**
>
> *Many Infor WFM customers don't realize that THEY are responsible for testing ALL the changes to their Inforsolution and ensuring that there's no disruption to their WFM system configuration, employee workflows, and employee paychecks.*

Why Getting Changes Wrong Has Very Real Consequences for Your Organization

Today's workforce management involves maintaining compliance with complex, ever-changing legislative rules with lots of fine print. For example, the U.S. Department of Labor enforces over 180 different labor laws, and getting compliance wrong on just one of these rules could result in labor violations and fines. **When organizations don't test changes properly, it can lead to production errors that impact their workforce, have severe consequences for their brand, and potentially create serious legal issues.**

Social media sites where disgruntled employees can air their payroll frustrations and grievances have become a goldmine for labor lawyers looking for their next clients!

CONSEQUENCES FOR YOUR WORKFORCE:

Your workforce is the biggest asset in your business. At a bare minimum, your employees expect you to provide consistent, dependable, and lawful compensation for their work, and to break this baseline expectation severely damages loyalty, trust, and morale.

CONSEQUENCES FOR YOUR BRAND:

When payroll-related mistakes are made, they quickly become public. Social media sites such as Facebook, Reddit, Twitter, and other platforms are magnets for employees seeking to air their grievances publicly.

LEGAL CONSEQUENCES FOR YOUR BUSINESS:

Mistakes with your WFM solution do more than impact your workforce and brand; they can land you in legal trouble. All you have to do is Google "overtime lawsuit" to see how prevalent and expensive compliance issues can be to your bottom line.

The 3 Pillars for Managing WFM Changes Quickly and Efficiently

Making ongoing changes to your Infor WFMsystem is unavoidable and if you get any of those changes wrong, it can have serious consequences for your organization. **Fortunately, the following three pillars will help you manage ongoing changes quickly and efficiently, while minimizing risk**:
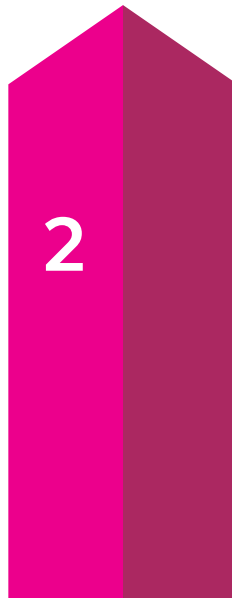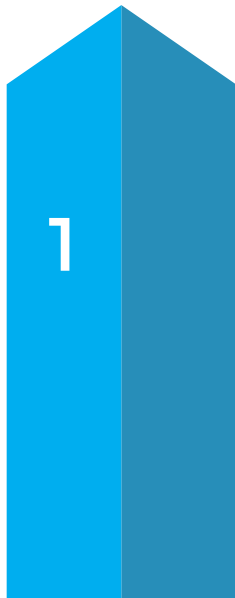
IT CHANGE MANAGEMENT: a formalized process that makes it easier for your organization to roll out changes to your Infor WFM solution. IT Change Management gives you a collection of discrete activities that help you consider, agree, and deploy changes to your WFM ecosystem as easily, quickly, and cheaply as possible while effectively managing risk.

CONTINUOUS TESTING: a repeatable process where you create and run test cases to verify every production change made to your Infor WFM solution. These tests (often called regression tests) ensure that any change you make functions correctly and doesn't negatively affect previously working functionality.

TEST AUTOMATION: a process where automated testing software is used to remove the burden of repetitive manual testing. A computer creates the required data with automated testing, executes the steps, and automatically compares the results against the expected results. The process is repeatable and takes seconds to complete.

1

2

3

In this guide, we'll help you clearly understand each of these three pillars. By the end of this guide, you'll know exactly what you need to do to manage WFM changes 24/7, pay your people with confidence, and make the most of your investment in Infor Workforce Management.

Chapter Two
Effective IT Change Management Safeguards Your Organization

You've worked hard to implement Infor WFM, but even though your implementation has ended, the changes coming your way have not. You'll need to respond to business and policy changes and accept ongoing Infor releases and updates.

Many Infor customers struggle to maintain their WFM solution amidst all this change and fail to implement a process for effectively managing these requests. All too often, they make changes directly to their production environment, resulting in unintended consequences.

The solution to these problems is to ensure that changes to your production environment are managed and implemented using a process known as IT Change Management.

What is IT Change Management?

IT Change Management is a formalized process that makes it easier for your organization to roll out changes to your Infor WFM solution. It's a standardized process, or collection of discrete activities that help you consider, agree to, and deploy changes to your WFM ecosystem as easily, quickly, and cheaply as possible while effectively managing risk.

BENEFITS OF EFFECTIVE IT CHANGE MANAGEMENT FOR INFOR CUSTOMERS

In addition to minimizing the impact of disruptions to your business and employees, effective IT Change Management will also help your organization to:

>> Implement changes more quickly

>> Optimize IT and business risk exposure

>> Minimize the severity of any impact/disruption

>> Improve transparency and communication with stakeholders

>> Easily track the rollout of any changes if something goes wrong

>> Implement changes the first time (without the need to rollback or rework)

The lack of adequate IT Change Management documentation is often a major stumbling point in internal and third-party compliance audits.

How to Create an Effective IT Change Management Process

An effective IT Change Management process ensures that all changes to your Infor WFM solution are documented, reviewed, approved, implement‑ed, and validated in a controlled way.

There are several IT Change Management *process* steps you should follow. These include:

1. **Request Change:** Formally requesting a change (also known as a "Request for Change" or 'RFC')

2. **Review Change:** Ensuring that every RFC is reviewed

3. **Test:** Testing the changes to ensure they function correctly and do not adversely affect existing functionality or employees

4. **Approve:** Approving any requested changes

5. **Plan & Schedule:** Planning and scheduling the implementation of changes

6. **Implement Change:** Implementing and logging the changes

7. **Validate:** Assessing and reporting on the results of the changes
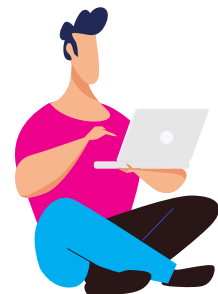

You don't have to struggle to make ongoing changes and maintain your Infor WFM solution. With an effective IT Change Management process in place, you can safeguard your organization against unnecessary errors, maintain compliance, accept Cumulative Update and Cumulative Patch Infor releases, and enable your business to move faster with confidence.

Chapter Three

Continuous Testing Ensures You Pay People Correctly and Stay Compliant

A key element of an effective IT Change Management process is the ability to test all changes before they are made to production.

A continuous testing program helps you proactively test every change to your Infor WFM solution, ensuring you protect your organization, pay employees correctly, and stay compliant.

What is WFM Continuous Testing?

WFM Continuous Testing is a repeatable process where you create and run test cases to verify every production change made to your Infor WFM solution.

These tests (often called regression tests) ensure that any change you make functions correctly and doesn't negatively affect previously working functionality. This is a practice in which testing is done as a part of the IT Change Management process.

These regression tests should validate a broad range of system functionality, and we strongly recommend that you give particular focus to validating your employee's pay and benefits.

Benefits of WFM Continuous Testing

1. REDUCE THE RISKS OF MAKING CHANGES TO INFOR WFM

One of the most significant benefits of Infor WFM is the ease and flexibility to update pay rules, accruals, and other business logic. With continuous testing, you can quickly respond to changing business needs, reduce the risk of the new changes negatively impacting your organization, and be more confident to deploy those changes to production.

2. SAVES YOUR ORGANIZATION AND SUBJECT MATTER EXPERTS (SMEs) TIME

A well-defined continuous testing process reduces the time needed to plan, write, and run the tests required to validate each production change.

Often these required changes are time-sensitive, and the timeline is out of your control. So you may need to perform regression testing at inconvenient times for your business, e.g., during a seasonal change freeze period.

However, since these regression tests are documented with clear step-by-step instructions, they are easy to understand. So, they can be run by someone who has

no intimate experience with your system. The most significant benefit being that you can free up your subject matter experts' time to focus on more pressing day-to-day activities.

3. ACCEPT CUMULATIVE UPDATE (CU) AND CUMULATIVE PATCH (CP) INFOR SOFTWARE RELEASES WITH CONFIDENCE

Accepting new CU and CP Infor software releases is a must. New releases are chock full of valuable features, critical security updates, product improvements, defect fixes, and performance improvements.

However, validating that a new Infor release won't have a negative impact on your system, or your employees is your responsibility. After every maintenance window customers must:

- **Run tests against your test tenant using your data and your configuration.**
- **Test application extensions and external interfaces that have been built for your implementation.**
- **In the event a test fails, log a support incident via Concierge**.

A continuous testing process gives you the confidence to accept a CU or CP Infor software release.

4 Keys to Successful WFM Continuous Testing

A successful WFM Continuous Testing program is:

DOCUMENTED

Every test is captured with step-by-step instructions written in plain English with clear expected results. Everyone can easily understand these tests, and even a novice user without deep subject matter expertise can run them.

REPEATABLE

A repeatable set of tests are stored in a known location for future re-use and don't need to be re-created with each change which saves significant time and effort.

MAINTAINED

All tests are considered valuable assets and are edited and maintained as part of an IT Change Management process that ensures they are current and valid when needed.

AUTOMATED

Best practice continuous testing programs are fully automated and can be executed quickly, and don't require subject matter experts (SMEs) to be available.

Continuous testing provides a repeatable process to test your Infor WFM solution faster, more often, and with confidence. You're able to validate every change to production to ensure the changes won't adversely impact your system, business, or employees.

Best-of-breed continuous testing programs are fully automated, enabling you to run tests frequently and quickly without any human engagement. Typically, an automated solution helps to reduce the burden of manual testing by **over 90%.**

Documenting these details clearly also means the tests themselves become valuable documentation on how the system should function.
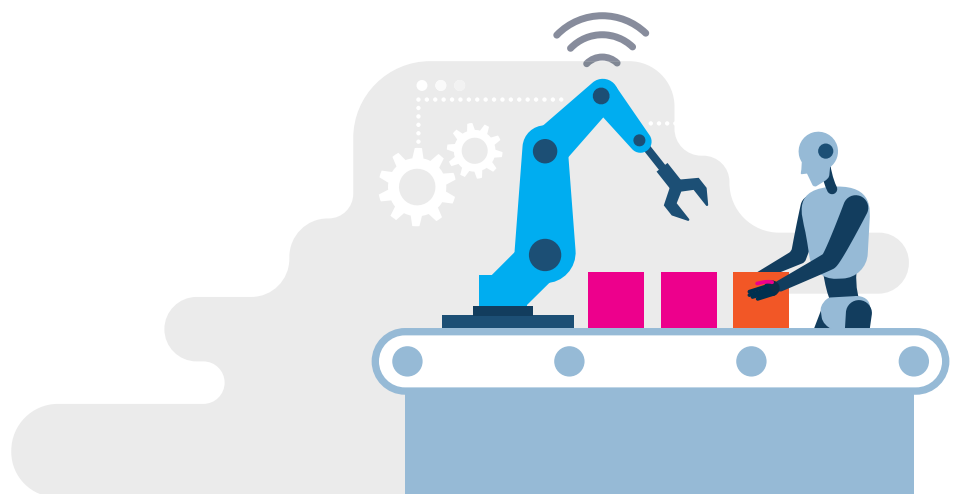
Chapter Four
Test Automation Removes the Burden of Repeated Manual Testing

While continuously testing every production release can be tedious and involve a lot of manual work, it's the only way to ensure that you continue to pay your employees correctly.

Fortunately, test automation software removes the burden of repeated manual testing so your organization can take advantage of automated continuous testing.

Cut your manual testing effort by 90%

What is Automated Testing?

First, let's look at the difference between manual testing and automated testing.

With manual testing, you must first document the specific steps required to execute each test case. These steps are incredibly detailed and help provide training and clear documentation so that a team member without extensive subject matter expertise, e.g., offshore resources, can execute the tests.

Additionally, the test must specify what data to create and use (e.g. which type of employee) along with clearly documented business outcomes i.e. expected results if all the steps are followed correctly.

As a result, the tests cases are incredibly long and difficult to read, and the business outcome is hard to discern and comprehend. It also leads to more misunderstandings between the business and testers.

Once you've set up a test case, a human tester follows the steps and manually compares the results with the 'expected results.' Every time a test needs to be run, a human must manually execute the steps and compare the results. This process is slow and error-prone.

Automated testing software creates the required data, executes the steps, & automatically compares the results against expected results in seconds.

Automated testing software creates the required data, executes the steps, and automatically compares the results against the expected results in seconds.

And since the detailed steps needed to execute the tests are performed by the computer and embedded in the automation, you can dramatically simplify the test cases and focus on desired business outcomes.

Why You Need Test Automation

Automated testing can support you throughout your entire Infor WFM journey, helping you accelerate project timelines, go-live sooner, and respond to ongoing changes faster.

With the right automated testing solution, you'll be able to:

1 Test significantly faster than manual testing

2 Test more frequently and validate every production change

3 Eliminate the need for ongoing manual testing

4 Reduce demands on your subject matter experts (SMEs)

5 Improve quality and dramatically reduce production errors

Chapter Five

So What's the Catch? Why Isn't Everyone Doing Automated Continuous Testing?

You may be asking yourself – why isn't everyone doing automated continuous testing?

Traditionally, automated testing requires several tools to write tests, store the code, trigger test runs, and report on the results. It takes considerable effort to make all these tools work together as part of a test automation platform.

Consequently, an engineering team not only has to write test automation code but also must constantly maintain a complex Infor-specific automation framework that requires:

>> Test automation expertise

>> Deep expertise of the Infor system being tested, and

>> Maintenance (of the automated tests)

Unfortunately, most customers don't have the time, resources, expertise, or the budget to build and maintain automated testing frameworks for Infor WFM.

Fortunately, TestAssure's Test Automation Platform comes complete with Infor-specific test automations that are available 'out-of-the-box' so you can start testing from day one. We also build and maintain all centralized automations for our customers so they're always ready for you when you need them.

TestAssure's test case library and pre-built Infor WFM test automations are available 'out-of-the-box' so you can start testing from day one.

How TestAssure.ai Enables Automated Continuous Testing

1. Test Case Library & Pre-Built Automations

TestAssure has a library of pre-built automated test cases specific to Infor WFM that can be quickly and easily configured to meet your unique business needs for continuous testing. No coding is needed as each test case is already automated through the TestAssure platform.
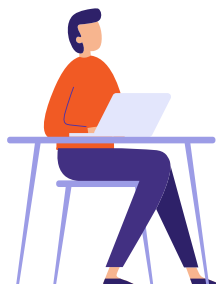
2. Maintains Your Automations for You

Our team consistently maintains your automations for you. Each piece of code is updated with every Infor release. You no longer need a team of in-house automation experts to achieve test automation. Your team can focus on other business priorities.

3. Runs Your Automated Test Cases Regularly

We run your test cases every month, so they are always ready for you at the click of a button and can be executed in a few minutes. This allows you to run your tests more frequently and test every production change before it goes live.

4. Provides Monitoring Alerts and Error Logging

We monitor your monthly test runs and alert you whenever there is a problem. We'll notify you about any issues and provide detailed error logging so you can see what data was created and which steps are failing.
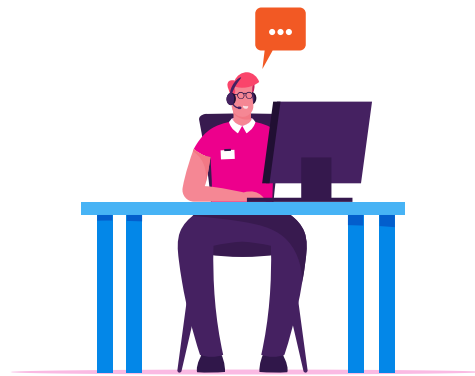
The most effective way to manage Infor WFM changes 24/7

TestAssure's platform helps you remove the burden of repeated manual testing and enables your organization to take full advantage of automated continuous testing. Using TestAssure, you can manage Infor changes 24/7, pay your people with confidence, and make the most of your investment in Infor Workforce Management.

TestAssure helps you test faster, go-live sooner, and make Infor WFM changes with confidence.

Want to
Learn more
about
TestAssure.ai?

Easily accept Infor software releases and make changes with confidence.

Discover the benefits of test automation and continuous testing.

Contact us today for a test drive – email us at automation@testassure.com or visit TestAssure.com

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