

Agentic Workspace (AW) – Test Strategy Document

Prepared For: Enterprise Deployment at Fortune 500 Financial Services Company

Prepared By: Dhanapriya

Date: 17/9/25

1. Introduction

Agentic Workspace (AW) is a **business process automation platform** that supports invoice processing, compliance workflows, and customer support automation. This test strategy defines the QA approach to ensure a **secure, scalable, and compliant deployment** for the enterprise client.

Objectives of Testing

- **Validate functional workflows and business rules** across all modules.
 - **Ensure system performance under high load** (10,000+ documents/day, 200+ concurrent users).
 - **Verify integration with external systems** (ERP, CRM, cloud storage, messaging, legacy databases).
 - **Validate automated and AI-assisted processes** for correct decisions, exception handling, and routing.
 - **Confirm security, compliance, and usability requirements** (RBAC, KYC, audit trails, SOX/GDPR, responsive UI).
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2. Risk Assessment

Risk Area	Description	Impact
RBAC (User Roles)	Four roles: Super Admin, Workspace Admin, Process Analyst, Auditor	Unauthorized access or compliance breach
Multi-Mode Execution	Automated, AI-assisted, Human-supervised workflows	Misclassification, missed approvals, or delays
External Integrations	SAP, Salesforce, AWS S3, legacy DBs	Failed sync, authentication errors, data mismatch
High Volume Processing	10,000+ docs/day, 200+ concurrent users	SLA violation, performance bottlenecks
Compliance Checks	SOX, GDPR, KYC, audit logs	Legal/regulatory fines, audit failures

3. Test Approach

Testing Types

- **Functional Testing** – workflows, document processing, RBAC, notifications
- **Integration Testing** – SAP, Salesforce, AWS S3, email, APIs
- **Performance/Load Testing** – simulate 10,000+ docs/day, 200+ concurrent users
- **Security Testing** – authentication (OAuth, API keys, tokens), encryption, access control
- **Usability/UI Testing** – Solution Builder, Process Designer, Job Monitor (cross-browser, responsive)
- **Compliance Testing** – SOX/GDPR audit trails, KYC validation, data protection
- **Regression Testing** – ensure changes don't break existing features

Approach Highlights

- **Risk-based testing** prioritizing financial and compliance-critical workflows.
 - **End-to-end scenario testing** across automated, AI-assisted, and human-supervised modes.
 - **Error handling validation** (retry logic, notifications).
 - **Manual performance observation** with workload simulation.
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4. Test Environment Strategy

Layer	Components / Setup
Web Application	Solution Builder, Process Designer, Execution Monitor
Processing Engine	Document Processor (PDF, Excel, images), Intelligence Engine (AI, risk), Integration Gateway (APIs, messaging, storage)
Database	Production-like schema with anonymized test data
Integrations	Test instances for SAP, Salesforce, AWS S3, email systems
User Roles	Accounts for Super Admin, Workspace Admin, Process Analyst, Auditor
Monitoring	Dashboards for performance, logs, alerts
Backup/Recovery	Snapshots, failover simulation

5. User Management Testing Strategy

- **Role Assignment & Inheritance** – confirm Super Admin > Workspace Admin > Analyst/Auditor hierarchy.
- **Permission Enforcement** – validate CRUD actions per role.

- **Cross-Org Isolation** – ensure no data leakage between organizations.
 - **Authentication & Session Management** – test login, logout, token expiry, MFA if applicable.
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6. Process Framework Testing

Execution Modes

- **Automated Mode:** Validate straight-through processing (input → validation → output).
- **AI-Assisted Mode:** Check decision suggestions, exception routing, adaptive behavior.
- **Supervised Mode:** Confirm approvals, manual interventions, audit trails.

Testing Scenarios

- Mode switching and fallback.
 - Step dependencies and sequencing.
 - Error handling in each mode.
 - Load performance under peak demand.
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7. Application Interface Testing

Solution Builder Interface

- Object definition (schemas, validation rules, relationships).
- Connector setup (email, SAP, Salesforce, DB).
- Template creation, version control, publishing.

Process Designer Interface

- Visual workflow builder (drag-drop, branching).
- Execution settings (timeouts, retries, notifications).
- Test framework (simulation, debugging, performance testing).

Job Monitoring Interface

- Dashboards (real-time jobs, KPIs, alerts).
 - Logs and error reporting.
 - Analytics (success/failure trends, resource usage).
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8. External Integration Testing

- **Connector Framework:** Email, cloud storage, databases, REST APIs, messaging, file transfers.
 - **Authentication:** OAuth 2.0, API keys, tokens, certificates.
 - **Data Format Validation:** PDF, JSON, XML, Excel, images.
 - **Error Handling:** Retry logic, alerts on failed sync.
 - **Performance:** Large file transfers, concurrent API calls.
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9. Test Data Strategy

- **Invoices & Financial Docs** – PDF, Excel formats.
- **KYC Documents** – ID proofs, contracts.

- **Customer Support Cases** – Emails, chat transcripts.
 - **Synthetic & Masked Data** – for compliance and GDPR.
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10. Entry & Exit Criteria

Entry Criteria:

- Environment set up with connectors & roles.
- Test data prepared.
- QA team sign-off on scope.

Exit Criteria:

- All critical workflows passed.
 - SLA (99.9% uptime) validated in load test.
 - SOX/GDPR/KYC checks verified.
 - No open critical/high defects.
 - Stakeholder sign-off.
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11. Reporting & Metrics

- **Daily QA Status Reports** – progress, defects, risks.
- **Defect Metrics** – severity, resolution rate.
- **Performance Metrics** – throughput, response time, success/failure rate.
- **Compliance Metrics** – audit trail completeness, GDPR/KYC coverage.

12. Conclusion

This test strategy ensures that **Agentic Workspace (AW)** is validated for **functionality, integration, performance, security, and compliance** before enterprise deployment. By focusing on **high-risk areas** (RBAC, integrations, AI-assisted workflows, compliance, and performance), the strategy reduces go-live risks and ensures a stable rollout for the financial services client.