Edge Standard Infor Background Integration Testing

Document History:

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Marc Giguere	07/02/21	Initial Document Creation; based on original generic testing documents	1.0

Introduction

The purpose of this document is to explain how testing processes can be achieved between client Infor platform and the Edge WebScreen platform. This document is intended for use by both the client and the client's Infor technical team as a guide on how to process testing cases from Infor through to Edge and ensure responses can be received back into Infor.

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Testing Process Flow - Overview

Step 1 – Start Background Check Request

The client and/or vendor would initiate the background check request from Infor Platform to Edge WebScreen platform.

Step 2 – Edge Receives & Acknowledges Request

Edge system receives request and does initial core validation of key data points to ensure all required data elements are received. One of two possible outcomes will result from this initial submission:

a. If any required data points are missing or invalid, Edge platform will send a response back to Infor indicating that an error occurred and provide specifics to what was incorrect. This error ***should*** be displayed/visible within the Infor platform and the issue reported should be corrected and a new submission attempted.

b. If core validation passes without error, the Edge platform will respond with an acknowledgement back to Infor platform indicating that the order was accepted and will also include a URL to redirect the user to that will be one of the following:

    a. **Order Acknowledged Response (Non-Interactive)** – this page will display a simple confirmation that we accepted the order and that it is now pending processing by the applicant. The applicant will receive an email indicating that they must return to the Edge Portal Platform ("Portal") to complete necessary forms and confirm the information needed to process the background check.

    NOTE: This is the most typical response in many integrations and is used when it is known that the user placing the order does NOT have to make selections or decisions with regards to the package and/or searches to be processed.

    OR

    b. **Package Review & Search Selection** – depending on the configuration of the client and what services are being ordered, the Edge platform will return a URL that will direct the user placing the order to confirm the candidate for which they are requesting a background check and to confirm/review the package that was selected.

    Additionally, in the cases of packages that include options such as employment or education verifications, the Edge platform will show the user which of these types of data were provided by the candidate in Infor (if any were) and allow for selection of the specific items that should be processed by Edge.

    If the candidate provided none of these items or the items provided are NOT what the client would want Edge to check, then the user has the option to include comments that will then be passed along and displayed to the candidate when they return to the Portal system.

    NOTE: In order for this model to function properly, Edge must be made aware of all users that will submit orders from Infor and their Infor "userID" so that it can be associated to their Edge WebScreen user account for the purposes of single sign-on (SSO) logins. If users

placing orders do NOT have access or permission to Edge's WebScreen platform, then this model is not supported. The "Package Review & Search Selection" screen is only available to "logged in" users and hence the requirement to associate users between the two platforms.

Example of "Select Package & Verify Searches" screen:

Step 3 – Edge Sends Portal Email to Candidate

Once Edge either sends a basic acknowledgement back OR the client has made their selections if using the "Package Review & Search Selection" option, the Edge platform will then automatically send an email to the candidate being processed requesting them to return to the Portal to complete necessary forms and review the information that will be used for the background check.

Important Testing Considerations/Notes

NOTE: The Edge testing environment will ONLY send emails out to approved email domains that have been provided to Edge by the client and/or vendor. This is to ensure no real emails are sent out to candidates in error should any "live" candidate data be used in testing.

For example, Edge would need to receive a list of domains such as "edgeinformation.com", "mytestdomain.com" and these would need to be what the candidate email address transmitted to Edge via the request from Infor would need to be received as (ie: testcandidate@mytestdomain.com).

By default the Edge testing platform is configured to only send emails to the client's own primary domain as well as to the domain "mailinator.com", which is a special free email service that can be used to generate testing email addresses on demand.

The client and/or vendor needs to provide to Edge the domains for which test candidate email addresses will be coming from so that these emails can be sent and received for testing purposes.

IMPORTANT: Edge will configure this with whatever domains you provide, meaning if you plan to do testing using either your own company domain OR using a true email domain (ie: google.com, hotmail.com, etc.). If you use a very well-known domain and happen to use a real candidate email address, they WILL receive the email, so please be cautious with this.

Step 4 – Candidate Completes Portal Sequence

The candidate will then receive the email to return to the Portal system. This email will include both a link and then a username and password to be used. The username is always the candidate email that was submitted to Edge from Infor (hence the importance of using email addresses you can receive and notifying of what domains those emails will use). The password is a randomly generated password.

The user performing the testing must then login as the candidate and complete all the necessary steps required to complete the sequence of placing the background check order. This will include completing the forms that are prompted for as well as providing/updating any data points that are not originally provided by the Infor platform. The Portal system will prompt and indicate what is required when necessary.

Upon completion of all the necessary components of the Portal system, the data will be automatically submitted back into the Edge WebScreen platform and it is at this stage that the background check is initiated. Additionally, the candidate will receive an email thanking them for completing the Portal that also includes attachments of the documents they completed. This email again will be sent only to valid testing email domains.

Important Testing Considerations/Notes

Testing Case Demographic Information – the primary mechanism that controls how the testing cases will work is driven by the demographic information submitted for an applicant. By using specific name information for the applicant, the Edge system will automatically be triggered to move the screenings created into specific statuses and situations.

NOTE: It is NOT necessary to configure the candidate names with this information within the Infor environment, however as the candidate is being processed via the Portal platform, you should be sure to use the options outlined below to ensure the request will be automatically processed through.

Failure to use the information listed below will result in the request simply never being processed and no responses will be returned to the Infor platform. The "Last Name" of the candidate must always and ONLY be entered/updated exactly as "EdgeTest" to ensure automated processing occurs.

Specific Testing Scenarios

- **Simulate "InReview" Scenario**
  First Name: <anything>
  Middle Initial: "r" (case insensitive)
  Last Name: "EdgeTest"

  Result: This combination of name information will cause specific screenings of the order to be returned as an "InReview" status. These would require the client to login to Edge's WebScreen system to review those reports and make a "determination" on each one. Until such decision is made, no further updates will be returned.

  Overall Order Status: InProgress
  Overall Order Result: InProgress

  Screening Order Status: InProgress

Screening Order Result: InReview

- **Simulate "Fail" Scenario**
  First Name: <anything>
  Middle Initial: "h" (case insensitive)
   Last Name: "EdgeTest"

  Result: This combination of name information will make all screenings of the order to be returned as a "Fail" status, indicating that the applicant failed each screening check.

  Overall Order Status: Completed
  Overall Order Result: Fail

  Screening Order Status: Completed
  Screening Order Result: Fail

- **Simulate "Pass" Scenario**
  First Name: <anything>
  Middle Initial: Anything except "d", "h" or "r" (case insensitive, blank allowed too)
  Last Name: "EdgeTest"

  Result: This combination of name information will make all screenings of the order to be returned as a "Pass" status, indicating that the applicant passed each screening check.

  Overall Order Status: Completed
  Overall Order Result: Pass

  Screening Order Status: Completed
  Screening Order Result: Pass

- **Simulate "Fail" Scenario (MVR Only)**
  First Name: <anything>
  Middle Initial: "d" (case insensitive, blank allowed too)
  Last Name: "EdgeTest"

  Result: This combination of name information will make all screenings of the order to be returned as a "Pass" status, with the exception of the driving/MVR check which will be "Fail".

  Overall Order Status: Completed
  Overall Order Result: Fail

  Screening Order Status: Completed
  Screening Order Result: Pass (except MVR which will be Fail)

NOTE: If either the vendor or client needs login credentials to the development version of the WebScreen platform, Edge can assign a testing username and password to be used for this purpose. This will be determined on an as needed basis.

Additionally, Edge can link a users' InforID to their existing WebScreen account and this will facilitate the single sign on option from Infor to Edge.