Test Summary Report

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# 1. Purpose (Tarjanee Desai)

This document outlines the activities conducted during the testing of the Purchase Order and Expense Claims Modules within the Xero Cloud-Based Accounting System.

# 2. Application Overview (Tarjanee Desai)

The Xero accounting system is a cloud-based financial management solution tailored to meet the diverse needs of businesses. Offering functionalities such as invoicing, expense management, payroll, reporting, and purchase orders, Xero provides comprehensive tools to streamline financial operations efficiently. Its seamless integration with third-party applications enables users to automate workflows and access real-time financial data. With a user-friendly interface accessible from any device, Xero empowers businesses of all sizes to manage their finances effectively.

# 3. Testing Scope (Shloka Gupta)

### a) In Scope

1. **Purchase Orders:**
   * + - Creating and modifying purchase orders.
       - Approval workflows for purchase orders.
       - Integration of purchase orders with inventory management and accounts payable.
2. **Expense Claims:**
   * + - Submission of expense claims by users.
       - Approval process for expense claims.
       - Reimbursement procedures and integration with payroll.
       - Validation of expense claims against company policies.

**b) Out of Scope**

* + **Performance Testing:** This includes load testing and stress testing of the system under high volumes of transactions. These tests are not conducted at this stage and could be considered in a future testing cycle.
  + **Security Testing:** Specific security testing, such as penetration testing or vulnerability scanning, is not included in this phase of testing.

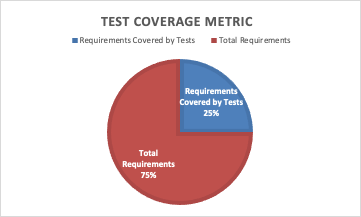
### c) Items not tested

* + **Integration with External Financial Systems:** Verification of connectivity and data exchange with external systems, such as banks or other financial services, which are not directly part of the core Xero system functionalities being tested here.
  + **Advanced Reporting Features:** Some of the advanced reporting functionalities that require data from modules not covered in this testing phase (like advanced financial analytics) will not be tested.
  + **Third-Party App Integrations:** Specific third-party applications that enhance the functionality of the Purchase Order and Expense Claims modules but require separate setup or subscriptions are not tested at this stage.

# 4. Metrics (Tarjanee Desai)

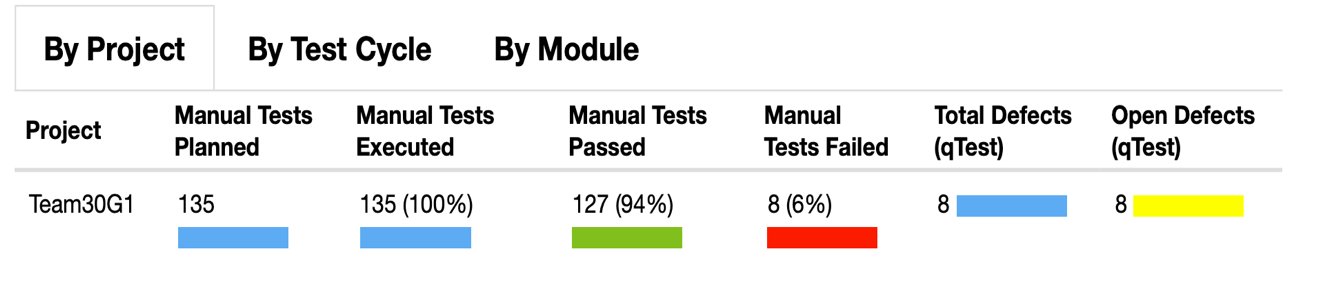
### Test Coverage

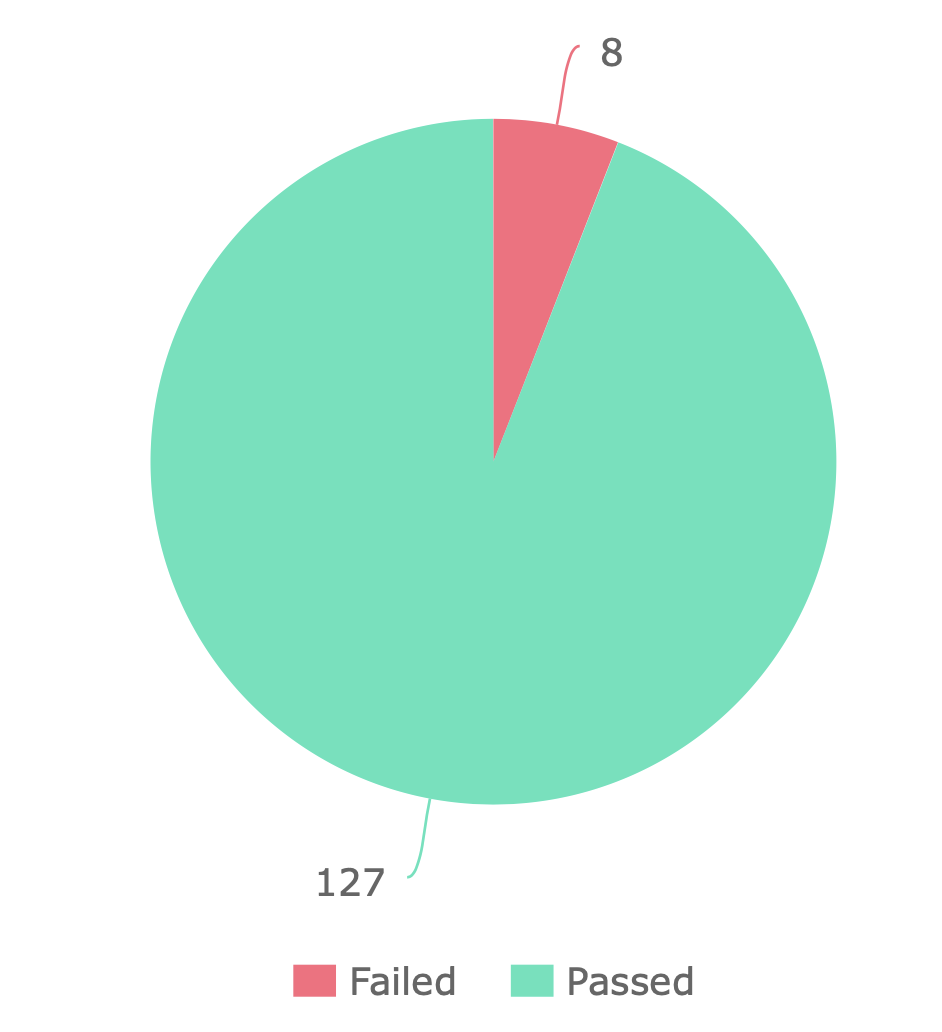
|  |  |
| --- | --- |
| **Total Requirements** | **Requirements Covered by**  **Tests** |
| 39 | 13 |



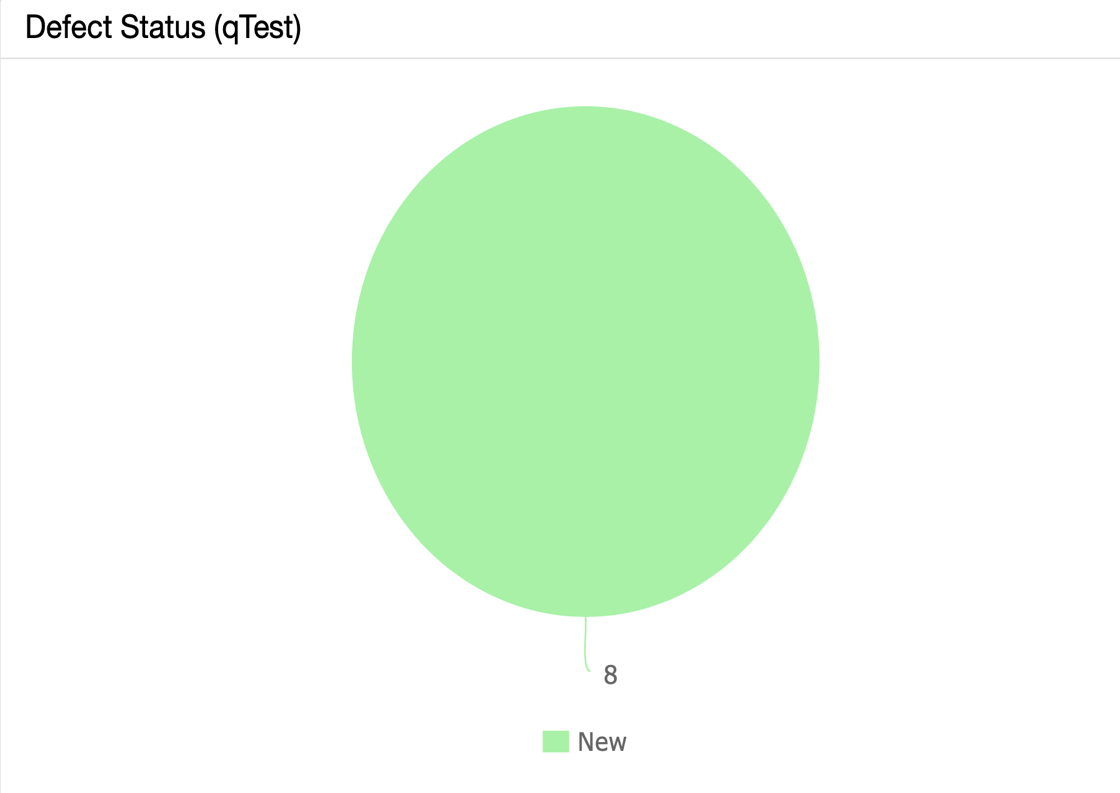
### No. of test cases planned vs executed & No. of test cases passed/failed

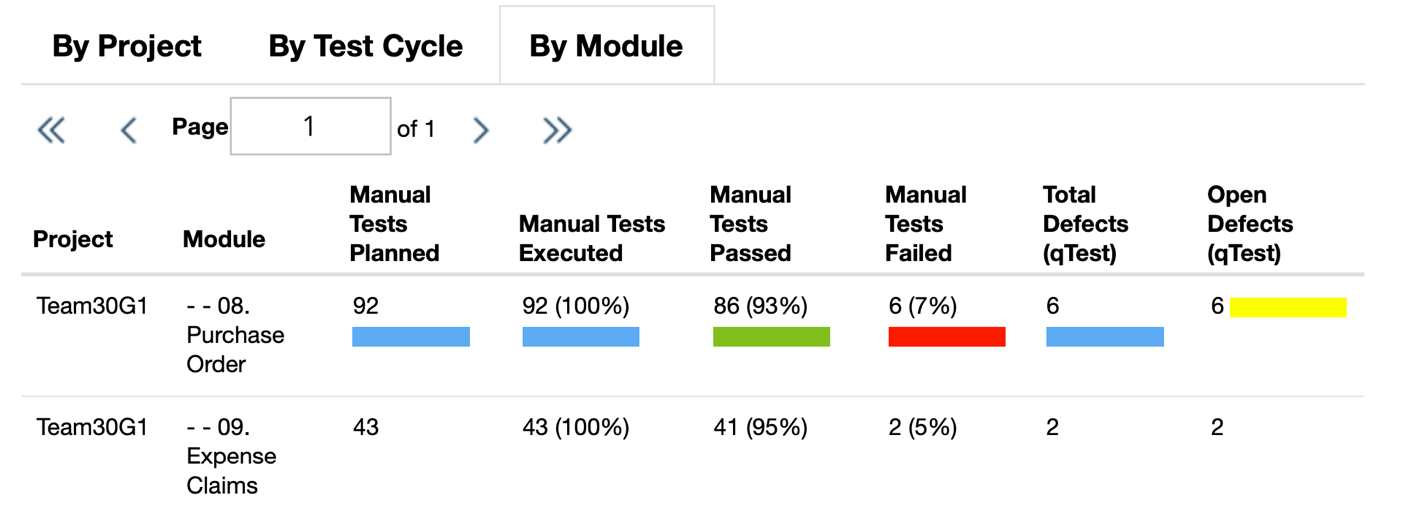
|  |  |  |  |
| --- | --- | --- | --- |
| **Test cases planned** | **Test cases executed** | **TCs Pass** | **TCs Failed** |
| 135 | 135 | 127 | 8 |

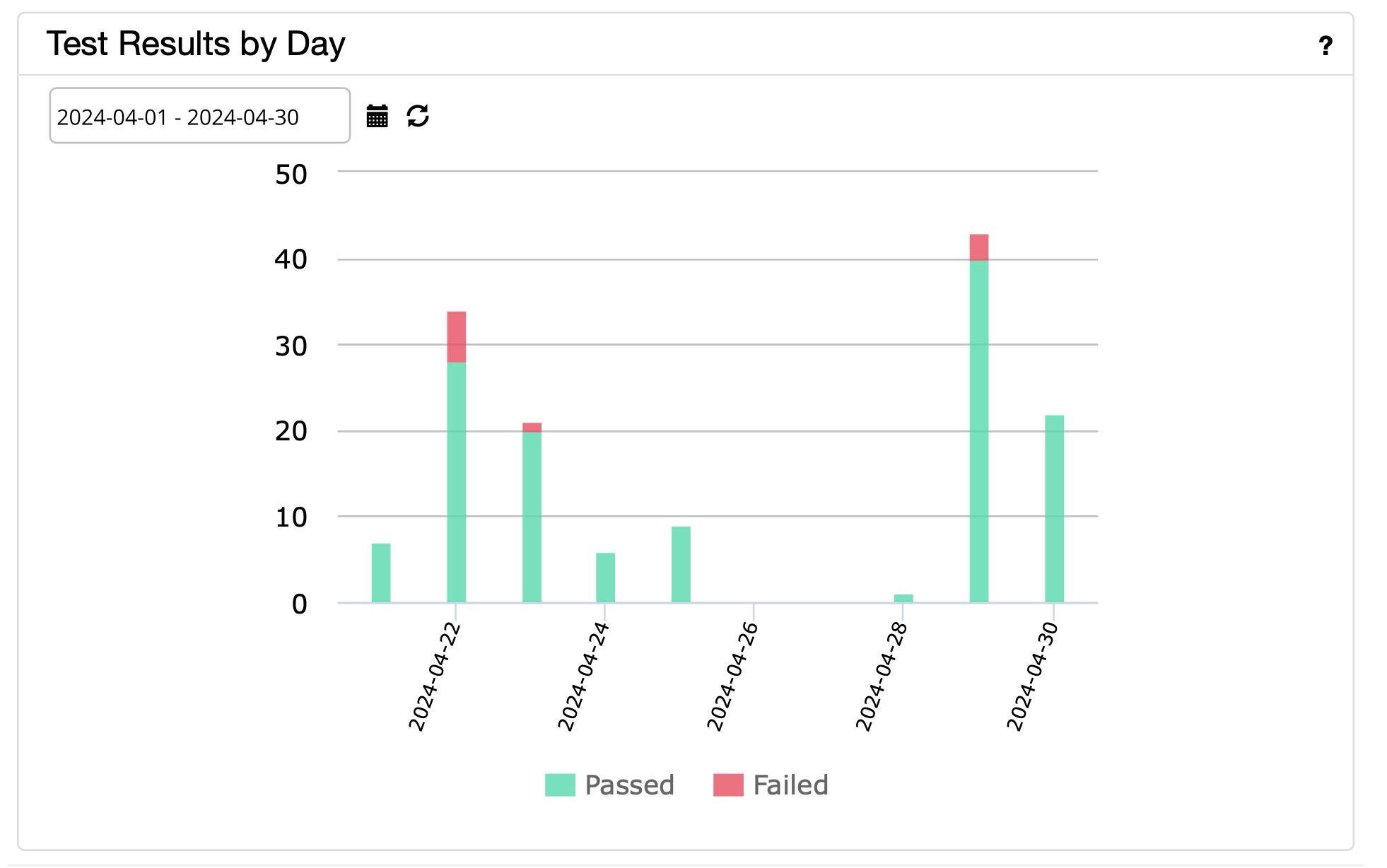




**No. of defects identified**







# 5. Types of testing performed (Tarjanee Desai)

**1. System Testing:**

System Testing was conducted to ensure the seamless operation of the Purchase Order and Expense Claims Modules within the Xero application environment. This phase involved validating that the modules functioned according to specified requirements and integrated effectively with related core features such as invoicing, expense management, payroll, and reporting. Comprehensive testing of critical business scenarios was performed to ensure the proper functioning of essential functionalities without errors. This testing phase aimed to assess the overall performance, reliability, and compliance of the modules within the Xero ecosystem.

**2. Integration Testing:**

Integration Testing was carried out to verify the seamless interaction and integration of the Purchase Order and Expense Claims Modules with other components within the Xero ecosystem. This involved validating data flow and communication between the modules and related core features, such as invoicing, expense management, payroll, and reporting. The testing aimed to ensure that the modules functioned harmoniously within the integrated environment, without any compatibility issues or data inconsistencies.

**3. Functional Testing:**

Functional Testing focused on validating the core functionalities of the Purchase Order and Expense Claims Modules within the Xero application environment. This included rigorous testing of tasks such as creating and modifying purchase orders, submitting expense claims, processing approvals, and other essential functions. The testing aimed to verify that these functionalities operated accurately, efficiently, and in compliance with specified requirements, without errors or deviations.

**4. Regression Testing:**

Regression Testing was conducted periodically within the Xero application environment to ensure the stability and proper functioning of the Purchase Order and Expense Claims Modules over time. This involved retesting of existing functionalities to confirm that recent changes, defect fixes, or enhancements did not introduce unintended side effects or disruptions. Test cases were executed to verify that the modules continued to perform reliably and consistently, without regression issues.

# 6. Test Environment & Tools (Kalpana Komateneni)

* **Server:**
  + **Type:** Virtual Private Server (VPS)
  + **Operating System:** Linux CentOS 7.5
  + **Configuration:** 8 vCPUs, 16GB RAM, 200GB SSD Storage
  + **Location:** Datacenter XYZ
* **Database:**
  + **Type:** MySQL 8.0
  + **Configuration:** 16GB RAM, 500GB Storage
  + **Location:** Same server as the application
* **Application URL:** [https://www.xero.com](https://www.xero.com/)
  + **Environment:** Production
  + **Access Credentials:** Provided to testing team
* **Testing Tools:**
  + **Test Management Tool:** JIRA
  + **Defect Logging Tool:** JIRA, qTest
* **Browsers Tested:** Chrome, Firefox, Safari, Edge (latest versions)
* **Devices Tested:** Desktop (Windows, macOS), Mobile (iOS, Android)

# 7. Lessons Learnt (Tanzil Bilal Mohammed)

|  |  |  |
| --- | --- | --- |
| **S. No** | **Issues faced** | **Solutions** |
| 1 | Lack of communication among team members for test case execution of their respective features in the Xero application | Implement a centralized communication platform such as Slack. Encourage regular stand-up meetings or check-ins to discuss progress and any blockers. Establish clear channels for reporting test case execution status and results to ensure transparency and accountability. Regularly review and reinforce the importance of communication in achieving project goals. |
| 2 | Inconsistent test case documentation among team members | Establish standardized templates and guidelines for documenting test cases. Conduct training sessions to ensure all team members understand and adhere to the documentation standards. Regularly review and provide feedback on test case documentation to maintain consistency. |
| 3 | Inadequate knowledge transfer between team members | Schedule knowledge-sharing sessions or workshops to facilitate cross-training and skill development among team members. Encourage pair testing or shadowing opportunities to transfer domain-specific knowledge and testing best practices. |

# 8. Recommendations (Tanzil Bilal Mohammed)

* Establish clear communication channels and documentation procedures to streamline the process of requesting access rights or permissions.
* Practice creating and managing access rights and permissions within a test environment to familiarize with the process.

# 9. Best Practices (Kalpana Komateneni)

# Before, testing we made the documents of test cases and their expected outputs which helped us in directing the steps to a testing tool which is [Tricentis qTest](https://www.bing.com/aclk?ld=e8SeZ0lvy9pDzAKfrLrWjkDDVUCUxHX3FNfOFhXjzzQcGoy6pVLKV0Vw5ulPAZ0aMa6ZSZ7ixiDm_NUXC8tLFWLgJETj1vjOKTnUy96r7Mm7wjSQmpTNBh9hfARPFKzIUG2HlmkocNaCZ7KEkHlFqLXWRyIkAEuwc4lexhm_yPSmE0upm4&u=aHR0cHMlM2ElMmYlMmZ3d3cudHJpY2VudGlzLmNvbSUyZnNvZnR3YXJlLXRlc3RpbmctdG9vbC10cmlhbC1kZW1vJTJmcXRlc3QtdHJpYWwlM2Z1dG1fc291cmNlJTNkYmluZyUyNnV0bV9tZWRpdW0lM2RwYWlkc2VhcmNoJTI2dXRtX2NhbXBhaWduJTNkcVRlc3RfU2VhcmNoX0JyYW5kX0hpZ2hfQU1TX0VOJTI2dXRtX3Rlcm0lM2RxdGVzdCUyNm1zY2xraWQlM2RjOTM3OTBiNzJlMDYxNmNiNjA3YmY2ODRiNGNkMmE0MCUyNnV0bV9jb250ZW50JTNkcVRlc3QlMjUyMFRyaWNlbnRpcw&rlid=c93790b72e0616cb607bf684b4cd2a40&ntb=1)

In which the testing is practiced and executed the test cases and made the logs of them.

# 10. Exit Criteria (Tarjanee Desai)

1. All test cases should be executed – **Yes.**
2. All defects in Critical, Major, Medium severity should be verified – **Yes**.
3. Any open defects identified – **Detailed action plan will be prepared to address it.**

# 11. Conclusion/Sign Off (Tarjanee Desai)

Based on the successful fulfilment of the exit criteria outlined in Section 10 of this Test Summary Report, the Testing team concludes that the application is stable for deployment. All defined criteria for testing completion have been met, indicating that the Purchase Order and Expense Claims modules within the Xero accounting system have undergone thorough testing and validation. However, it is crucial to emphasize that appropriate UAT & Business acceptance testing should be conducted prior to deployment to ensure that the application meets the expectations and requirements of stakeholders.

# 12. Definitions, Acronyms, and Abbreviations (Tarjanee Desai)

* **qTest:** It is a test management tool used by testing teams to streamline test planning, execution, and reporting processes. It provides functionalities such as test case management, test execution tracking, defect management, and real-time reporting, facilitating efficient collaboration among team members and ensuring comprehensive test coverage throughout the software development lifecycle.
* **JIRA:** It is a project management and issue tracking software developed by Atlassian. It allows teams to plan, track, and manage their projects using customizable workflows, agile boards, and real-time reporting; enables teams to create, prioritize, assign, and track tasks, issues, and bugs throughout the development lifecycle.
* **UAT:** Stands for "User Acceptance Testing." It refers to the phase of testing where end-users validate the application to ensure it meets their requirements and expectations.
* **URL:** Stands for "Uniform Resource Locator." It is a web address that specifies the location of a resource on the internet.
* **Defect:** Refers to any deviation from the expected behaviour of the application identified during testing.
* **Action Plan:** Refers to a detailed plan outlining the steps to be taken to address and resolve any open defects or issues identified during testing.
* **Test Environment:** Refers to the setup of software, hardware, and network configurations used for testing purposes.