

CASE STUDY

SMALL TEAMS FIND MUSCLE TO DELIVER SERIAL WORKDAY DEPLOYMENTS AND DATA SECURITY

Project requirements

Support Bentley's back-to-back rollout cadence

Improve testing efficiency

Secure personal data as administrators increase

Project results

2000

HCM and security tests run/ update

22K

tests run/ year

7000%

increase in update test coverage



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Luluah Safri — Director of HR Operations

About Bentley University

Founded in 1968, Bentley University is a private co-educational university located in Waltham, Massachusetts. Recognised by The Princeton Review as one of the US' leading business schools, it's home to 5,000 students and more than 500 staff who study and teach across an array of disciplines.

A Workday-fuelled efficiency roadmap

In 2016, Bentley University reached a crossroads with their legacy ERP system Banner: upgrade to Banner XE or switch to a new solution. Not only was Bentley's license due to expire in 2018, but Banner was also retiring the product Bentley had been self-hosting for 25 years.

After years of toiling under an aging solution, Bentley embraced the shifting landscape as a chance to optimise their technology, properly centralise and digitise their back-office processes, and boost their ability to scale and adapt. After comparing numerous solutions—including Oracle Fusion—Bentley decided to go all-in with Workday, making it their system of record for everything: HCM, Finance, Payroll and Student. In fact, they were so impressed with Workday that they accelerated the timeline for system transition from 2018 to immediately.

Deployments threatened by resource constraints

A three-year program of successive rollouts was planned, and Bentley went live with its first Workday module, HCM, in January 2017. By March, they'd recognised the need for test automation:

- Staff were experiencing post-implementation testing fatigue.
- A month after launch, the five-week Workday 28 test period arrived.
- Resources were stretched.
- Confidence in testing capacity and capability was low.

"There's a lot on your plate when you introduce a new core system, both during the implementation and after," explains Luluah Safri, Director of HR Operations at Bentley. "Your business partners and operations team test steadily throughout the deployment project. After go live, everyone is still learning Workday as staff try to resume their day jobs and tickets stream in for fixes and change requests. Then on top of that you're pulling people into regression testing for the preview windows, which is time-consuming and stretches resources."

For their first major Workday update, Bentley's entire HR Operations team and two senior staff from HR/Benefits spent the five-week preview period manually regression testing their system full-time. However, the modest volume of testing and coverage they were able to achieve raised concern—six scenarios across approximately 30 BP tests, with no bandwidth for testing security, integrations or reports. They felt at risk of missing something critical and that a more effective approach was needed.

" [With Smart] I have this solid team behind me who has my back...So many vendors just don't provide that level of service. I wouldn't even consider looking anywhere else for Workday test automation. "

Pamela Sherman—Senior Database Support Analyst

"Once you start to see the power of Workday, you want to create efficiencies beyond the system to free up your teams to leverage it as much as possible," says Luluah. "We had a vision for a fully-fledged Workday system, which meant we were going to be in constant implementation mode for the next 18 months rolling out three more modules. Deployments and ongoing regression testing are staff-intensive and time-consuming. It was clear that trying to do both well with our small teams wasn't realistic and was a risk. Something would give. Either the quality of our future deployments would suffer, our deployment timelines would get pushed out, the integrity and stability of our existing configuration would be at risk because we weren't testing it thoroughly enough, or our teams would burn out."

Luluah continues, "We thought 'If we're moving toward more-efficient practices and we've brought on Workday to get away from manual tasks, then why not invest in automated testing too?'—because we knew from experience that once you get bogged down in manual processes, it's difficult to get out of it. Before and during implementation is the best time to see where you can create efficiencies because money is available to you and optimisation is high on everyone's agenda."



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Pamela Sherman—Senior Database Support Analyst

The Impact of Smart

With the clock ticking on their legacy ERP's expiration and limited resources available to drive their full transition to Workday, Bentley University wanted an automated testing solution that would free up their staff to deliver the future roadmap on time; give them confidence in the quality, breadth and depth of their testing coverage; and safeguard their configuration against problems as their Workday usage grew and they extended administrative privileges.

Since adopting Kainos Smart in March 2017, Bentley has successfully deployed Workday Finance, Recruiting, and Student—with Smart's automation both freeing up staff to focus on those critical deployment responsibilities and quickly flagging issues in the existing configuration caused by the rollouts. Regression testing coverage during Workday's bi-annual updates has increased by over 7000%, while the number of hands-on test staff needed for regression testing reduced to a single member of staff. Additionally, Bentley now regression test their own changes and Workday's weekly releases on a weekly basis, bringing their annual test execution to more than 22K tests per year.

"I'd definitely recommend Kainos Smart," says Luluah. "For an organisation like ours where teams are small, everybody wears multiple hats, and we don't have expertise in software testing, it has helped us reduce testing time and labour, mitigate that regression testing knowledge gap, and reduce our security risks."



Immediate value and continual catches

The ability to run Smart's reams of reusable tests at the click of a button empowers Bentley to carefully monitor the impacts of configuration changes. Smart catches issues before they reach production and cause problems for Bentley's end-users, contaminate financials, or violate compliance.

"The first time I ran our Smart HCM test pack, it flagged a critical issue," explains Pamela Sherman, Senior Database Support Analyst at Bentley who single-handedly executed Smart's automated test packs for 12 months. "The way the onboarding BP had been set up, it was possible for staff to delete their date of birth rather than merely amend it. That was a huge catch by Smart, because birthdates determine loads of other calculations and eligibilities, like life and health insurance, disability, benefits, etc. If Smart hadn't caught that, we wouldn't have known until affected staff experienced inaccurate payments or ran into issues with their insurance coverage, etc."

It was a similar story when Bentley introduced Smart's Security testing module. "At the time we were also in the middle of deploying Workday Finance to production," says Pamela. "New security groups were being added by the Finance team and domains were changing. Our security test pack immediately flagged differences between our sandbox tenant with our current configuration and our implementation tenant. The Finance and HR teams were wowed when I contacted them saying 'I've just spotted these five changes to our previous security settings. Were these all intentional?'"

Effortless updates without burdening HR

The feel-good factor continued with Bentley's first major Workday update using Smart. The teams had finished extensive testing of their HCM deployment in January 2017, testing the Workday 28 release in February, and testing their Workday Finance deployment in July.

Pamela explains "Nobody was looking forward to testing Workday 29 in August, but what a difference Smart made! With a few clicks I ran over 2,000 HCM and security tests against our sandbox and preview tenants, compared the results, and was able to quickly report the results to the team. HR loved it because it meant they no longer had to test everything. Instead, they focused their manual testing on Payroll, the handful of HCM BPs that weren't part of our automated test packs, and a few they cherrypicked just for their own peace of mind."



Confidence in security, control and compliance

Like many Workday customers, Bentley is subject to a host of compliance requirements. Smart's consistent test execution, variety of test types, and archive of results helps them certify that they're meeting their responsibilities around governance, risk management and internal controls.

"Smart gives me the confidence to know that things are working as they should," says Pamela, "especially for our Workday security, where it seems like we're always tweaking settings week to week and unintended consequences sometimes appear.

"For example, early in our use of Smart, our security test pack flagged that our Academic Partner role had been given more access to personal information than it should have—which is a data protection issue," Pamela continues. So we made a change in sandbox to the security role to fix the problem. When I ran the security regression pack on the Monday, tests began failing because Academic Partners could suddenly no longer perform actions on Adjuncts. Smart caught that issue in our configuration before we did, allowing me to contact HR, explain the repercussions of the change and work together on a fix before it reached our production tenant."

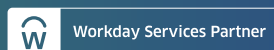
According to Pamela, Smart has also become an asset during audits, reducing the amount of time staff spend with auditors and making it easier to quickly provide evidence. "In July we had an HR audit on hire and termination," she explains, "and our auditor had questions for me about our security in Workday. I was able to tell her 'This is what the process is. These are the security tests I run every week. If there's an unexpected change to our security configuration, we know that because Smart will fail the test and report the failure like this. And this is my history of all of the past security tests I've run, including their results.' That just totally shut down the line of questioning. She was really impressed."

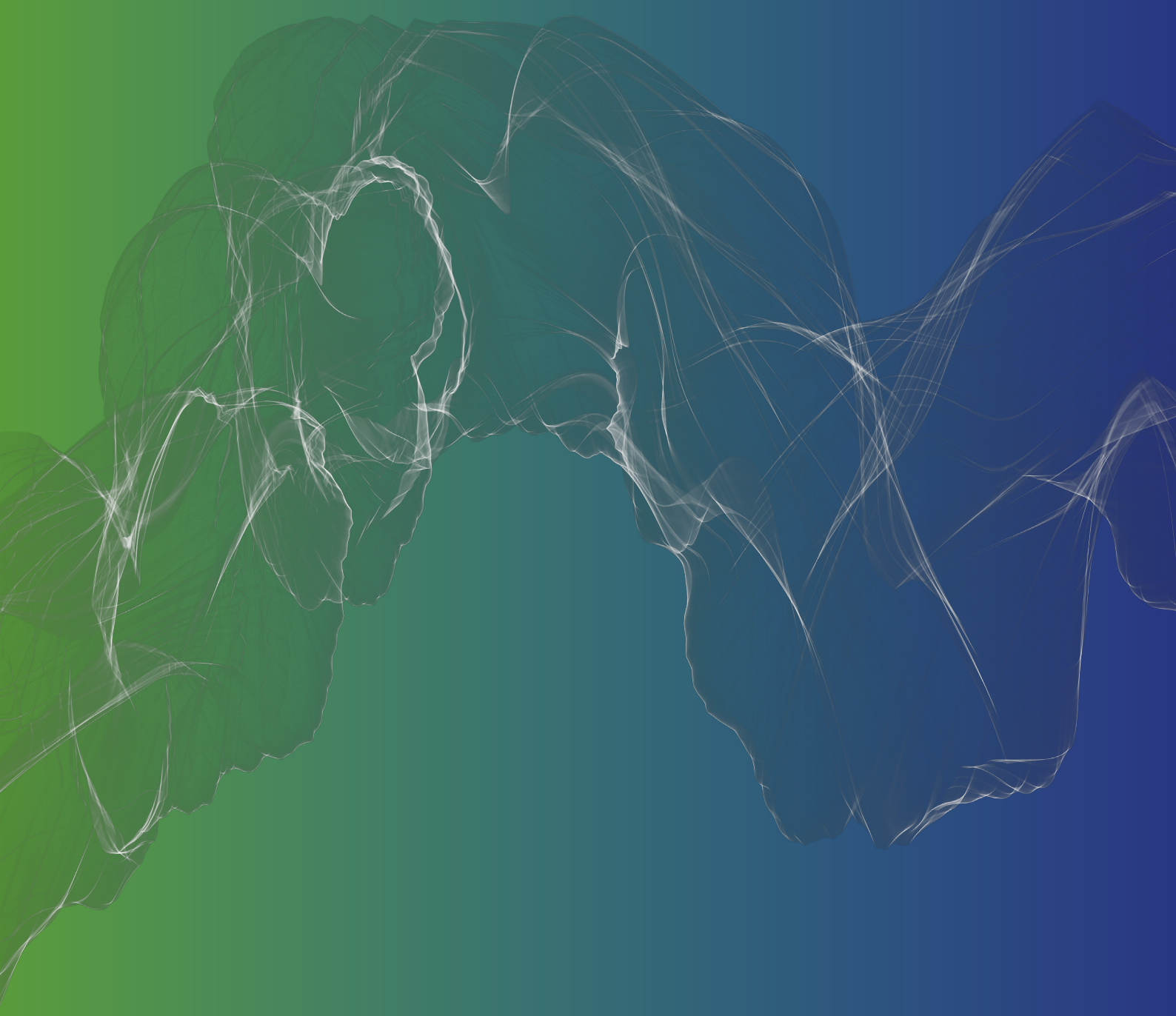
"I just love the product and the company," says Pamela. "Kainos is constantly improving Smart and the customer support is outstanding. Anytime I have a problem or a question, I never feel like I'm on my own because I have this solid team behind me who has my back—professionals who really know their stuff. So many vendors just don't provide that level of service. I wouldn't even consider looking anywhere else for Workday test automation."

Contact us to find out more about Smart:

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