



Hamilton Test Professionals Meetup

19th Sept. 2023

**BUILDING ON
BUSINESS PERFORMANCE**



Pacifictech



Shifting a team from Manual to Automation

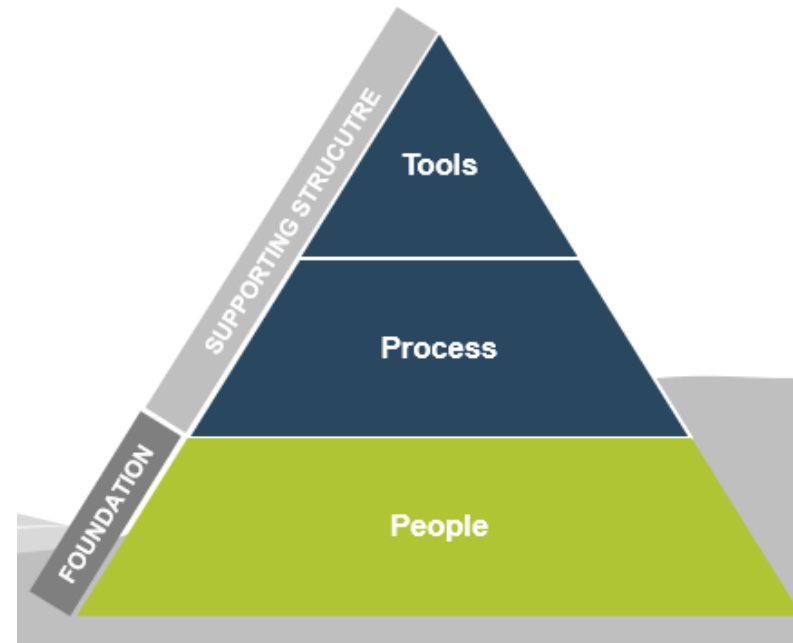
Richard Roodt

BUILDING ON
BUSINESS PERFORMANCE



Agenda Today

1. Introduction
2. PEOPLE
3. PROCESS
4. TECHNOLOGY / TOOLS



Who We Are | PEOPLE

• **Pacifictech** | <https://www.pacifictechsol.com/>

An **ISV** (Independent Software Vendor)

Sage 300 ERP add-on modules in the purchasing, workflow and compliance-based solutions.

• 2,500+ customers

Space Centre Houston, JSE, NATO, Scottish Canals, Primary Health Ontario, Barbados Tourism, Governor General of Australia, Monash College, Barnardos, Rowing NZ

• 100+ countries

• 3 languages (English, French, Spanish)

• Go-to-market approach: via Sage 300 Business Partners and Sage regional offices

Dev team adopted the Agile / SCRUM framework for software development

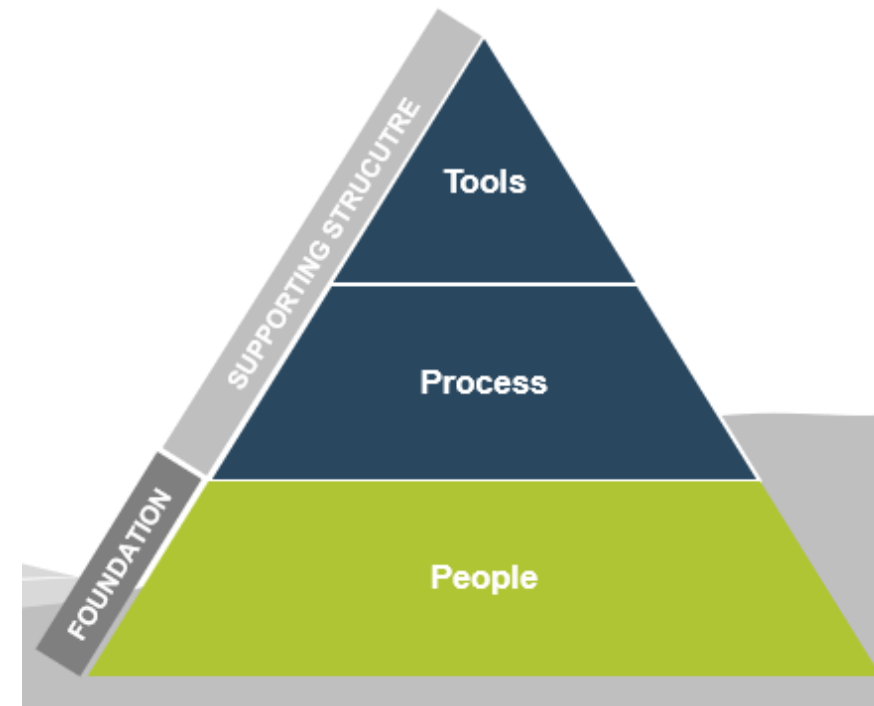
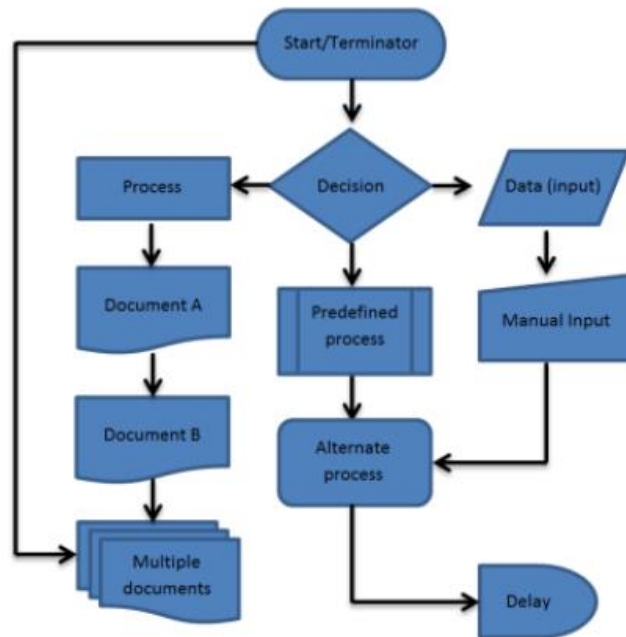


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PROCESS

IF people are your core foundation.....

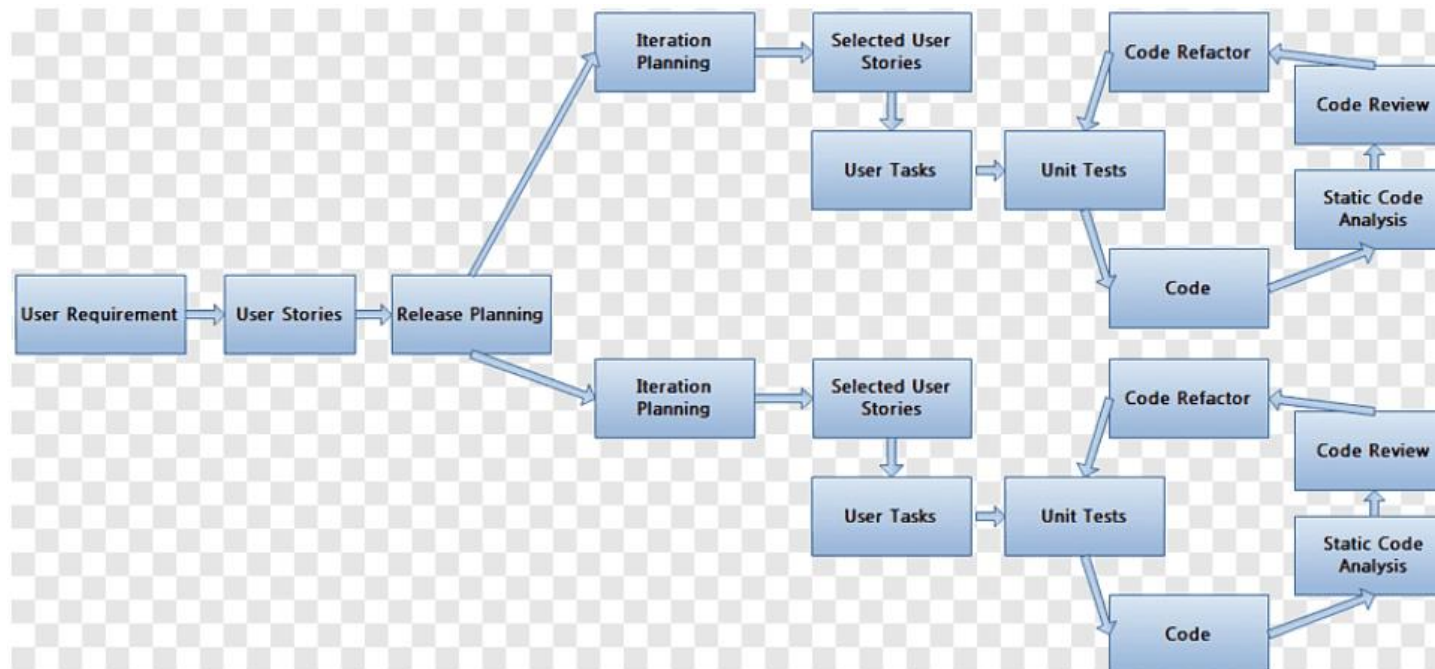
THEN processes are the scaffolding or framework for efficient operations



PROCESS

Processes are **iterative** – built over time; and adjusted / constantly evolving.

The Scrum **Retrospective** is an NB facilitator for this...



PROCESS

Our journey to Agile...

1. **Acknowledge** where you are now (and **Accept** that as your current reality)
2. Develop a **Vision** of where you want to be (**Aspiration**)
3. **Begin** the journey with small, incremental steps

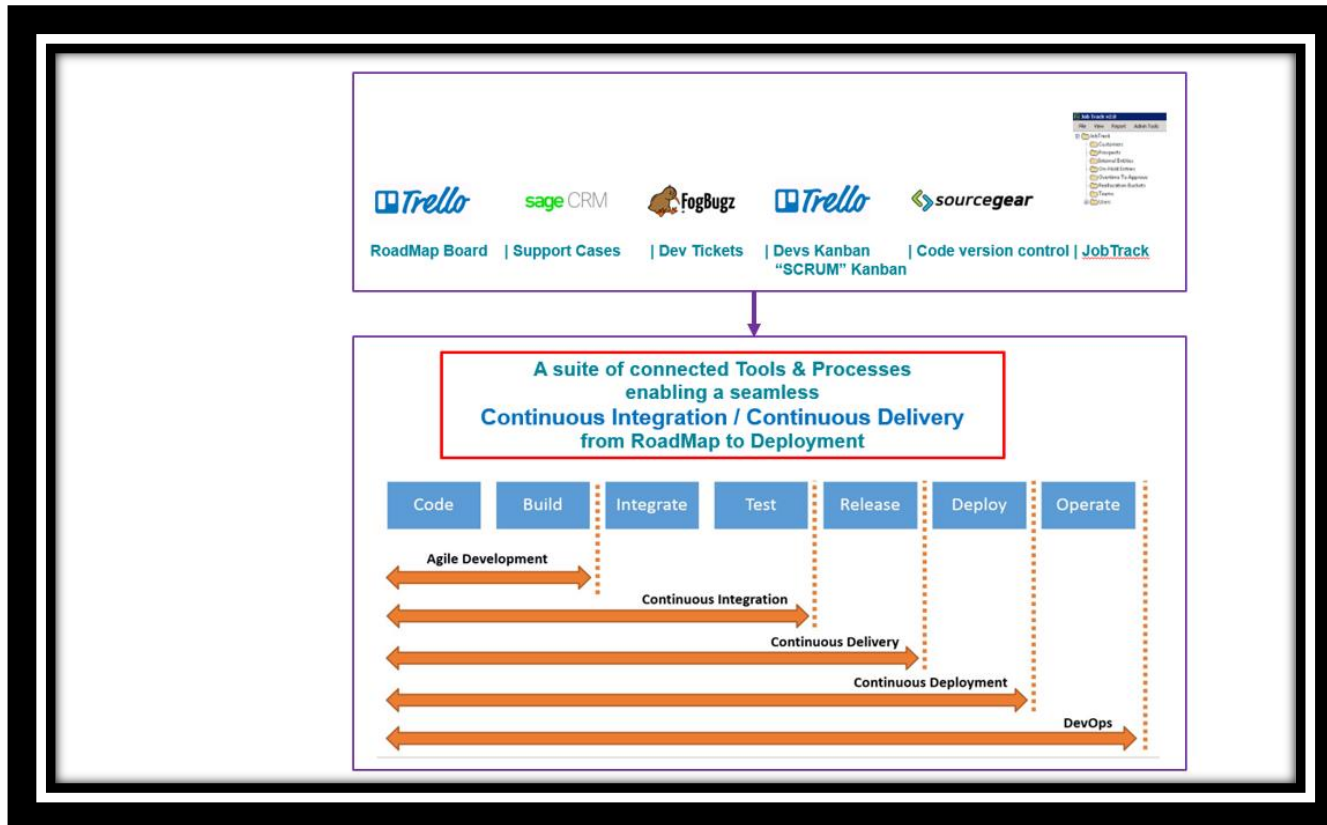
The screenshot displays a dashboard with the following elements:

- Logos for Trello, sage CRM, FogBugz, Trello, and sourcegear.
- Integration points: RoadMap Board | Support Cases | Dev Tickets | Devs Kanban | Code version control | JobTrack "SCRUM" Kanban.
- A red-bordered box containing two bullet points:
 - * Manual process / human intervention / non-automated tasks between Tools
 - * Difficult to easily hand-off RoadMap to Sprint Planning to Scrum Team to Testing to Production and then trace bugs/failures back to original source code.
- A sidebar on the right with a menu: Customers, Prospects, Internal Entities, On-Hold Entities, Overtime To Approve, Risk/Exception Buckets, Teams, Users.
- The Pacifictech logo in the bottom right corner.

PROCESS

Our journey to Agile...

- A snapshot of how we approached implementing the **Vision**



TOOLS (or Technology)

Manual or Automation [or AI ???]

Some Questions:

1) DO I need both (manual and automated tools/processes)??

Almost certainly... you will need a mix of both manual testing & automated testing tools / processes.

2) WHEN do I use Manual or Automation ??

It depends... (and some things just can't be automated.)

But the “Golden Rule” is: *Automate, automate, automate whatever you can.*



TOOLS (or Technology)

Some Questions:

3) **HOW** do I transition from Manual to Automation?

i) **Communicate** the vision – take the team with you on the journey

ii) **Plan** & map out the new processes required

iii) Take small iterative steps. **Learn by doing**

iv) **Suddenly you have a bunch of automated Processes and Tests**



TOOLS (or Technology)

Some Questions:

4) How do I know which Tool or Technology to use?

Again, it depends on your specific environment & requirements.

Mostly by doing research, then trial and error...

Doing a POC and evaluating the outputs.

An Agile principle: just do it and try something new.

Fail fast. Learn fast. Deliver fast.

(At each Sprint Review) → feedback loops.

Collaborate & learn from others in the Testing community.

Go on a field trip, a site visit, a breakfast/coffee whatever it takes!



PROGRESS & LESSONS LEARNED

1. Introduced a Dedicated Test Environment (Desktop & Web solutions)

- Separated Dev from Testing, on a “production like” environment

2. Introduced ROBOT Framework for Automated Testing (Web solutions)

- Testing of Web solutions moved from manual to automated
- Regression testing now possible with minimal fuss
- Performing version upgrades are much quicker (and less costly to the business)

3. Introduced a Full-time Tester role into the team.

- Dedicated Testing elevates the quality of releases
- Recognize that testing is a profession and discipline in the SDLC in its own right

4. ADO Test Plans??

- In retrospect: should we have chosen ADO Test Plans (over ROBOT) ???



QUESTIONS ???



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