
INVESTING IN QUALITY



FINANCE & TECHNOLOGY

Proximity is a digital investor communications platform that connects the world's ecosystem of issuers, intermediaries, and investors digitally in real-time, bringing unprecedented transparency, efficiency, and accuracy to traditional paper-based processes.

The Proximity solution gives public companies confidence that their AGM/EGM agendas are transmitted as “golden source” and provides institutional investors with the time to research and vote on corporate decisions, as well as digital confirmation that their votes have been received.

We spoke with Philip Lisamer, Head of User Acceptance Testing, about testing at Proximity. The User Acceptance Test team is responsible for most of the testing done at Proximity, conducting system, system integration, user acceptance and regression testing.

The Challenge

Philip describes a few challenges the team had prior to working with PractiTest.

“Before PractiTest, testing was managed & tracked via multiple excel files and test reporting was ad-hoc and manual, and therefore prone to inaccuracy. As a result, we struggled to get an accurate view of the testing in our projects to assess both the status, in terms of quality, & the progress, in terms of tracking to plan.”

Philip continues to another challenge regarding collaboration and consistency of test cases that caused different behaviours when different test associates tested the same functionality.

“PractiTest gave us a greater level of transparency in the status of testing, i.e., knowing how many tests have been executed across projects”

“Prior to using PractiTest, test design at Proximity was managed via Excel and SharePoint and collaboration between test associates was limited. As a result, we had inconsistency in the level of detail test scripts were written at, which varied from test associate to test associate based on their knowledge and experience. This meant that re-use

of test scripts across the team was minimal because effectively we didn't have a "one-size fits all" in terms of the amount of test script detail. Additionally, this lack of consistency highlighted that the way individual test associates validated specific functions or processes under test was also different and often produced different results or behaviours."

The PractiTest solution and benefit

After describing the difficulties his team had prior to PractiTest in terms of visibility & reporting Philip continues to the reason they chose PractiTest and what benefits they see from it.

"PractiTest has enabled us to create project dashboards to track the status and progress of testing, which has greatly improved the level of control we have on the process of overall project tracking. The fact that we can also log & track test defects in PractiTest allows us to assess the quality of code deliveries more accurately, which is beneficial in retrospectives."

Another side benefit the team is enjoying thanks to PractiTest is their

position in the organization. "The dashboards have also acted as a useful tool to promote the role of the User Acceptance Test team within the organization, since the dashboard can be shared with both PractiTest and non PractiTest users.

"PractiTest has enabled us to consolidate our tests and we can re-use them again & again"

In regards to the collaboration and consistency challenge the team was facing, Philip says: "Thanks to the PractiTest Library and the collaborative power this enables, the level of detail in our test script has been enhanced & harmonized so that it is baselined at a "novice" level, allowing test scripts to be executed by new starters with minimal system training. Although this extra level of detail requires additional time & effort during test preparation, the trade-off is that our new resources can get involved and learn more quickly & independently on the job.

Additionally, we have introduced a



formal peer review process so that we can evaluate and agree on the level of detail in test scripts; this has also helped with introducing the team to new developments.”

When asked about the main benefits from PractiTest Philip mentioned a few:

1. Transparency on the status and progress of testing, using the Dashboard function
2. Single shared repository of test scripts
3. Test traceability from requirement to test script to test run to defect.

We continued and asked Philip what he loves most about PractiTest.

“Other than the **colorful dashboards**, **the reports** we can produce and the **end-to-end traceability**, I will state 2 more things:

Single repository: I love the fact that

PractiTest has enabled us to pull together into a single shared repository, a library of test scripts, which before had been stored in a myriad of locations across different users. This alone has been powerful in terms of getting the team to successfully adopt several test processes changes we have introduced over the last 6-9 months within Proximity.

Reusability: Today, PractiTest has enabled us to consolidate our test scripts and thanks to the filter & field functionalities, we are able to “tag” tests by several attributes so that we can re-use again & again.

These two benefits together give us a library of test scripts which can be cloned & re-used either in full or as a baseline for a new test has also helped speed up our test design timeline.”

