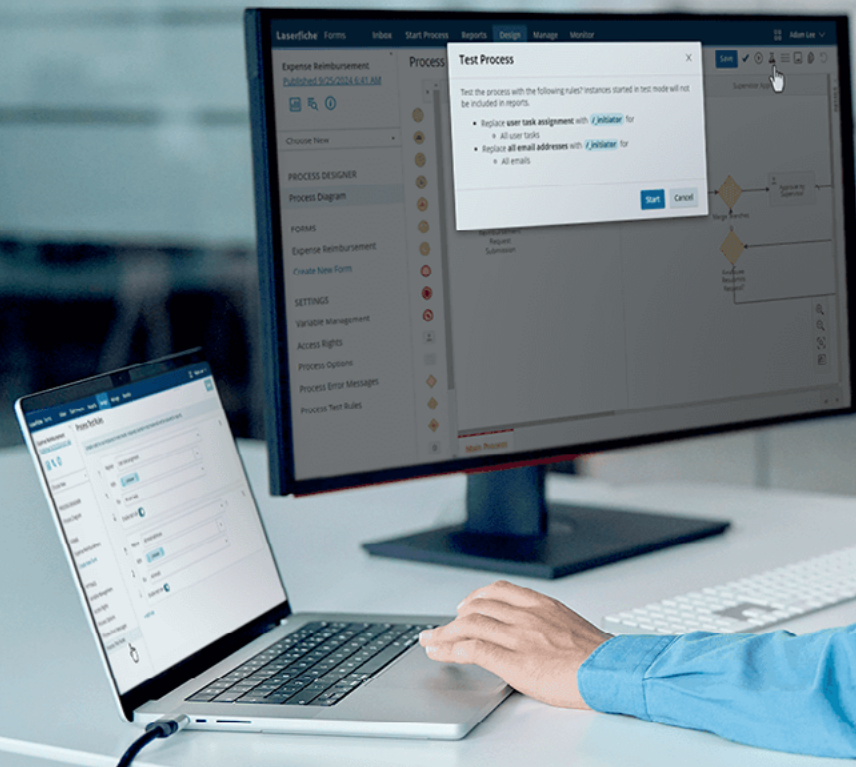


GETTING STARTED WITH Testing Processes in Laserfiche 12





Contents

Benefits of Process Test Rules.....	4
Specifying Process Test Rules	6
Testing the Process.....	7



Introduction

One of the most important steps in business process design is testing the processes to make sure that they work as designed. It is best practice to test your processes early and often, as that minimizes the time spent on troubleshooting. Incremental testing is a good habit to cultivate as it can reduce overall implementation time for processes.

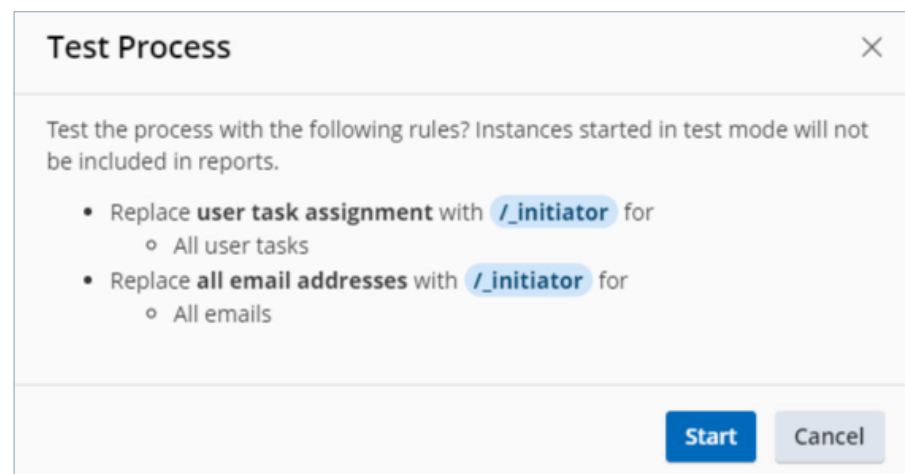
The items that we should test incrementally include but are not limited to branches of a process, emails sent within a process, files saved as parts of the process, and elements on a form.

Benefits of Process Test Rules

Laserfiche 12 helps process designers perform incremental testing by introducing process test mode. Designers can define test rules that dynamically substitute users and emails during a test run. Test rules eliminate the need to manually reconfigure user tasks and service tasks for testing purposes, reducing the time spent on testing and speeding up overall process deployment time. This allows organizations to safely test internal or public-facing forms without disrupting the live environment or cluttering up production data.

What does that look like in practice? Process test rules simplify process testing in the following ways:

- All User and Email Service Tasks can be assigned to, and sent to, a specified user or inbox.
- All Save to Repository Service Tasks can be set to save files in a testing location.
- Test instances are clearly labelled and excluded from reports.



Test Process dialog.

Process Test Rules

All User and Email Service Tasks Can Be Assigned to, and Sent to, a Specified User or Inbox

How does this simplify testing?

- Users who are part of this process don't have to be confused and overwhelmed with test emails.
- The process designer can make sure that emails will be sent as expected and users will be assigned the correct tasks without spending time reaching out to users who are part of the process to make sure they've received the emails or tasks.
- The process designer does not have to set all user tasks and emails to "Initiator" for the sake of testing, and then have to remember to go back and make sure they are all assigned to the proper parties.

Test Instances Are Clearly Labelled and Excluded From Reports

How does this simplify testing?

- If a process designer is testing changes to an existing process, they can easily filter out live instances to view only the test instances.
- The process designer does not have to remember to delete test instances before the process updates go live, since test instances aren't being included in process reporting.

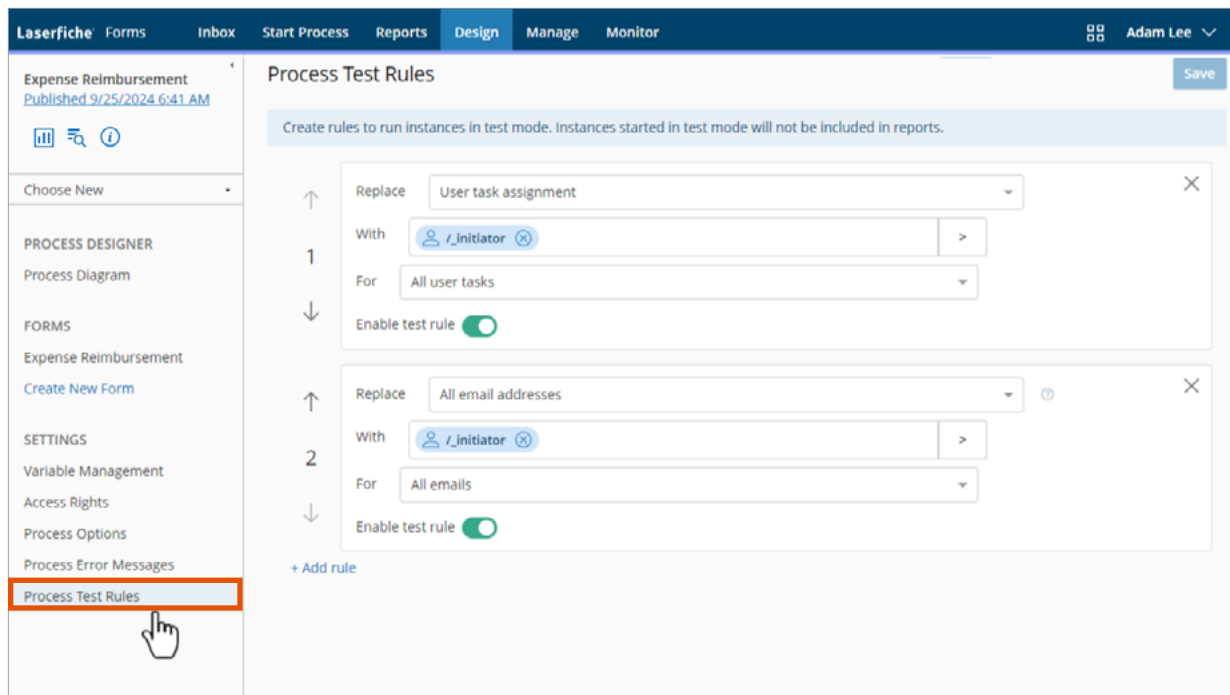
All Save to Repository Service Tasks Can Be Set to Save Files in a Testing Location

How does this simplify testing?

- The process designer does not need to delete test folders and documents after testing is complete and before the process goes live.
- The process designer can be granted full access to the test documents and folders saved to the test location in the repository without granting them access to the destination used in the live version of the process.
- The process designer doesn't need to worry about files saved in the live location kicking off additional workflow processes they were not intending to test.

Specifying Process Test Rules

Process test rules are specified on the Process Test Rules page, found under Settings in the lefthand pane of the Process Designer page. They are set for each individual process. To reduce configuration time, each process will have a test rule created to send all of the user tasks to the initiator by default. New rules can be added by clicking the Add Rule button. More information about setting process test rules can be found in the [Laserfiche 12 product documentation](#).

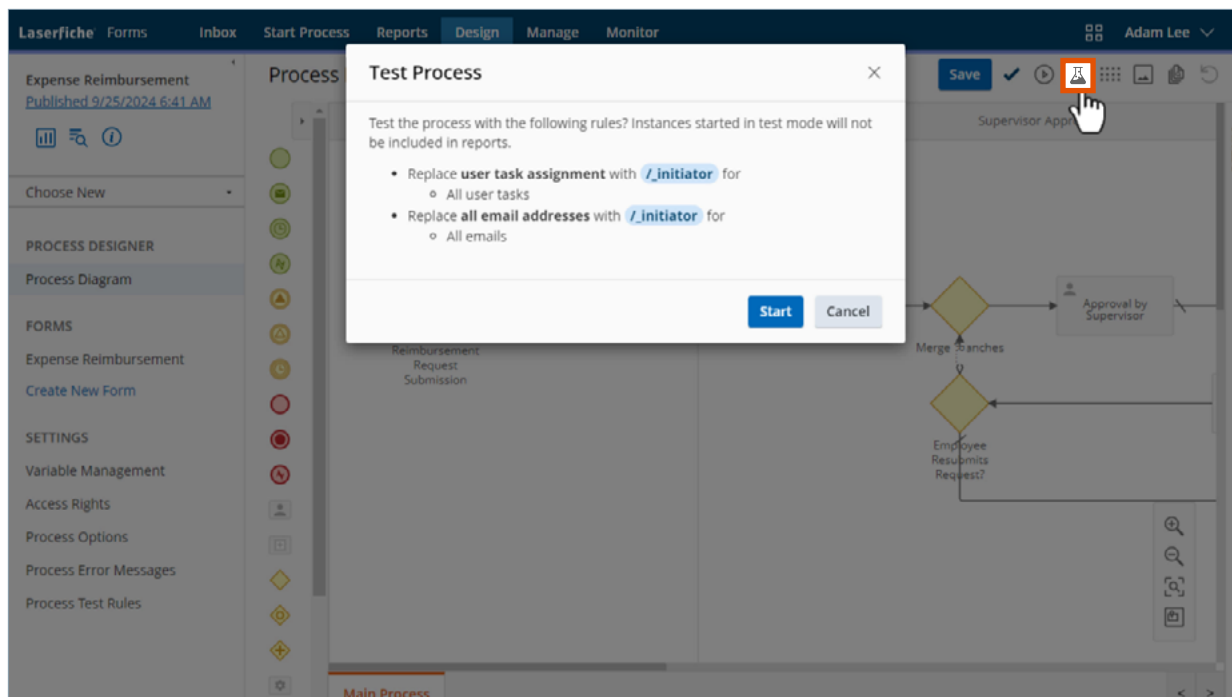


The screenshot shows the Laserfiche interface for configuring Process Test Rules. The left-hand pane is titled "Expense Reimbursement" and includes a "Process Test Rules" link at the bottom, which is highlighted with a red box and a hand cursor. The main area is titled "Process Test Rules" and contains two rule configurations. Each rule has a "Replace" dropdown, a "With" field containing a user icon and "_initiator", and a "For" dropdown. The first rule is for "User task assignment" with "All user tasks" selected. The second rule is for "All email addresses" with "All emails" selected. Both rules have an "Enable test rule" toggle set to "On". A "+ Add rule" button is visible at the bottom of the rule list.

Setting up Process Test Rules.

Testing the Process

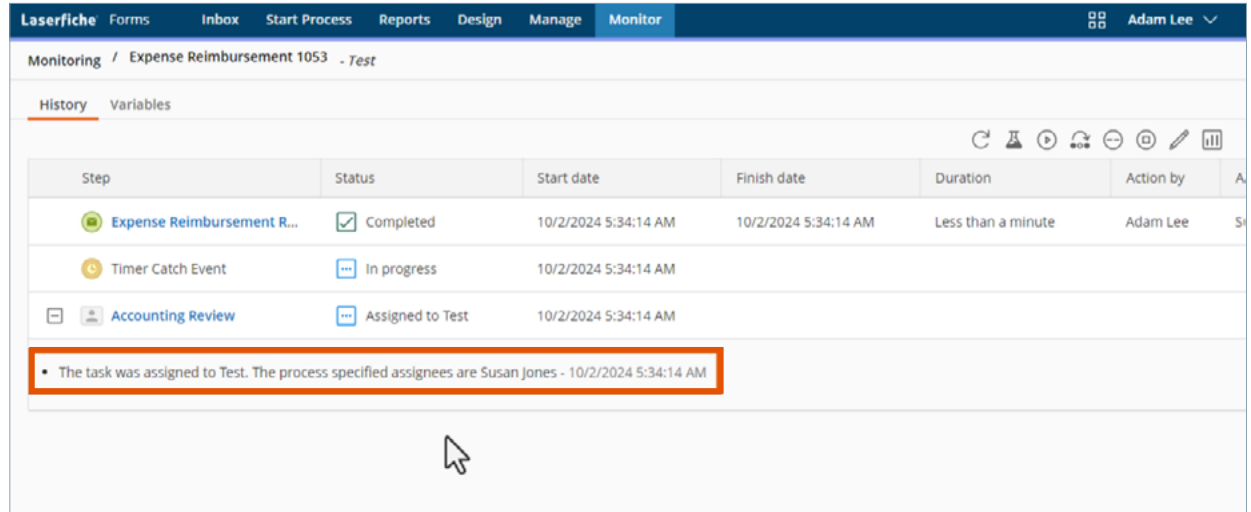
Once the process test rules are set, you can test the process by opening the Process Diagram page and clicking on the flask icon. Once you click the icon, you will be presented with the process test rules that will be applied to this particular process. Click Start to start the test.



Running a process test.

To help process designers ensure that emails in the live process will be sent to the intended recipient, a line at the bottom of each email sent during testing specifies the name of the actual email or task recipient.

Once the test is run, you can navigate to the Monitor page to view the test instance. Test instances have “Test” as part of their name, and test rules applied to each instance can be viewed in instance history. You can exclude them from the view by updating the value of the With Test Data drop-down.



The screenshot shows the 'Monitor' page in Laserfiche. The breadcrumb trail is 'Monitoring / Expense Reimbursement 1053 - Test'. There are two tabs: 'History' (selected) and 'Variables'. A toolbar with various icons is visible. Below the toolbar is a table with the following data:

Step	Status	Start date	Finish date	Duration	Action by	A
Expense Reimbursement R...	Completed	10/2/2024 5:34:14 AM	10/2/2024 5:34:14 AM	Less than a minute	Adam Lee	S
Timer Catch Event	In progress	10/2/2024 5:34:14 AM				
Accounting Review	Assigned to Test	10/2/2024 5:34:14 AM				

Below the table, a message is displayed in a red-bordered box: "The task was assigned to Test. The process specified assignees are Susan Jones - 10/2/2024 5:34:14 AM". A mouse cursor is pointing at the bottom of the screenshot.

Viewing test instances from a process.



eLearning Course: [New Streamlined Testing and Troubleshooting in Forms 12](#)

Product Documentation: [Process Test Rules](#)



About Laserfiche

Laserfiche is the leading SaaS provider of intelligent content management and business process automation. Through powerful workflows, electronic forms, document management and analytics, the Laserfiche® platform accelerates how business gets done, enabling leaders to focus on growth across the enterprise.

Laserfiche pioneered the paperless office with enterprise content management. Today, Laserfiche's cloud-first development approach incorporates innovations in machine learning and AI to enable organizations in more than 80 countries to transform into digital businesses. Customers in every industry — including government, education, financial services, healthcare and manufacturing — use Laserfiche to boost productivity, scale their business and deliver digital-first customer experiences.

Laserfiche employees in offices around the world are committed to the company's vision of empowering customers and inspiring people to reimagine how technology can transform lives.

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