



# Release Preview Guide

 **Note:** To view or download a printable version of this guide, click the following link:  [OpenAir Release Preview Guide](#).

To help you get the most out of your Release Preview account, review the following topics:

- [Overview of Release Preview](#)
- [Preparing for Testing](#)
  - [Accessing Your Release Preview Account](#)
  - [Functionality Available for Testing](#)
  - [How to Report Release Preview Issues](#)
- [Suggested Test Plan](#)
  - [Test Your Business Workflows](#)
  - [Test Critical Reports](#)

## Test Plan Template Available for Download

Download the Release Preview Test Plan Template to create a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. After you have downloaded the file, modify it to suit your testing needs.

Click the following link to download the template: [ReleasePreviewTestPlan\\_Template.xls](#).

## Overview of Release Preview

The release preview account is a temporary and isolated test account that is running the new version of OpenAir software. It is available for a short period before your production account is upgraded to a new OpenAir release. You can use the release preview account to:

- Become familiar with the new features and other changes in the upcoming OpenAir release.
- Verify that your existing business workflows function as expected before your production account is upgraded to the new OpenAir release.

The goal is to provide a smooth and seamless transition to a new release. By following the guidelines in the release preview guide, you can avoid major problems or surprises when your production account is upgraded to the new OpenAir release.

Your release preview account is separate from your OpenAir production account. Use your release preview only for testing. Make sure you are working in your OpenAir production account when you are performing your daily business activities.



**Important:** Review the following information:


- Changes made in your release preview account will not be reflected in your production account.
- Your release preview account is created automatically using a recent copy of your production account database.
- Your release preview account will be deleted shortly after your production account is upgraded to the new OpenAir release.
- Your release preview account cannot be refreshed during the release preview period.
- Read the release preview version of OpenAir release notes for information about enabling and using new features. To enable a new feature on your release preview account, contact OpenAir Customer Support. See the help topic [OpenAir Enhancements · April 13, 2024](#).

## Preparing for Testing

Download the Release Preview Test Plan Template to create a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. After you have downloaded the file, modify it to suit your testing needs.

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Refer to the following resources for more information about the upcoming release so that you have time to review new or changed functionality well before the release:

-  [OpenAir Release Sneak Peek](#) — The OpenAir Release Sneak Peek provides an overview of top features planned for the upcoming OpenAir release. It is available 4 to 5 weeks before the OpenAir release date.
- [OpenAir Enhancements · April 13, 2024](#) — The OpenAir Release Notes list the new features and product enhancements introduced in the upcoming release and provide information about enabling and using new features. A release preview version of the release notes and online help is available with your release preview account.

To prepare for testing in your release preview account, review the following sections:

- [Accessing Your Release Preview Account](#) explains how to access your release preview account so that you can become familiar with the new features and test them with your business workflows.
- [Functionality Available for Testing](#) includes a list of features that cannot be tested in your release preview account .
- [How to Report Release Preview Issues](#) explains what to do if you encounter an issue.

## Accessing Your Release Preview Account

Account administrators receive email notifications containing details about OpenAir release preview and production upgrade, and announcing the date when your release preview account will be available for testing.

**Note:** Access to your release preview account ends on the date your production account is upgraded to the new release.

Your release preview account is separate from your OpenAir production account. The release preview account is a temporary and isolated test account that is running the new version of OpenAir software. Use your release preview account only for testing. Make sure you are working in your OpenAir production account when you are performing your daily business activities.

Your release preview account cannot be refreshed with data from your production account during the preview period. Data and configuration changes made in your preview account cannot be transferred to your production or sandbox accounts.

### To access the release preview account from the URL:

1. Go to <https://auth.preview.openair.com/login>
2. Enter the same login details as for your OpenAir production account.

**Note:** The following functionality is not supported on release preview accounts:

- Forgot your password or ID?
- Reset your password or unlock your user account

## Functionality Available for Testing

Only modules that you have purchased and enabled in your production account are available in your release preview account. Make sure you understand the limitations of the release preview account when you use it to test features with your business workflows.



## Functionality Not Available for Testing in Release Preview Accounts

The following table lists features that are not available for testing in release preview accounts.

**Note:** Omission from the following table does not guarantee availability.


If you are interested in using some of this functionality in your release preview account, please open an Enhancement Request. This will help prioritize future efforts. See [How to Report Release Preview Issues](#).

Features	Notes
Integrations	<p>No integrations are supported. This includes the OpenAir &lt;&gt; NetSuite integration, custom integrations leveraging OpenAir API, OpenAir Integration Manager (OpenAir Connect) among other integrations.</p> <p>The only exception is the OpenAir OData service (OpenAir Business Intelligence Connector). When testing this feature on your release preview account, you should keep data volumes to a minimum to avoid performance issues impacting the release preview environment.</p>

Features	Notes
Thin Clients	OpenAir Mobile for iPhone or Android devices, OpenAir OffLine, OpenAir Exchange Manager, OpenAir Outlook Connector, OpenAir Project Connector.
Scheduled Events	Anything running at a 'specified time'. This includes Automatic Backup Service, auto-billing, scheduled reports, scheduled alerts, scheduled scripts, leave accrual runs, charge projections. This also includes daily foreign currency updates for multicurrency accounts.  <div style="border: 1px solid #0070C0; padding: 5px;"> <p> <b>Note:</b> Jobs which allow a “manual” run can be run manually, such as charge projections and leave accrual, unless otherwise specified as not supported. The NetSuite OpenAir/NetSuite integration is not supported.</p> </div>
Email	No emails are sent from release preview accounts for any activity.
SAML Single Sign-On	SAML authentication is not supported.  <div style="border: 1px solid #0070C0; padding: 5px;"> <p> <b>Note:</b> Users accessing your OpenAir production account using single sign-on cannot access the release preview account unless an account administrator or a user with the relevant access and role permissions turns SAML authentication off and resets the password for these users in the release preview account.</p> </div>
Forgot your password or ID?	The Forgot your password or ID functionality is not supported on the login page for your release preview account.
Reset your password or unlock your user account	The Reset your password or unlock your user account functionality is not supported on the login page for your release preview account.
Account Refresh and Retention	Your release preview account cannot be refreshed with the your production account data during the preview period.  The release preview account is available only during the preview period. Access to your release preview account ends on the date your production account is upgraded to the new release.  Data and configuration changes made in your preview account cannot be transferred to your production account or sandbox account.

## How to Report Release Preview Issues

Report any issues you encounter during testing by calling OpenAir Customer Support or by submitting a case online.

 **Note:** Your release preview account is not connected to the production instance of SuiteAnswers. To submit a case, access SuiteAnswers from your OpenAir production account.

### To submit a case:

1. In you OpenAir production account, go to the User Center menu and click **Support**.
2. Click **Explore SuiteAnswers**.
3. In SuiteAnswers, click **Contact Support Online**.
4. Provide detailed information about the issue. Indicate that you encountered the problem in your release preview account, and not on your production account.
5. Under Online Support, click **Create Support Case** and provide details of your issue.

A case is created in the NetSuite Support system under your release preview account and is flagged as a problem.

## Suggested Test Plan

Download the Release Preview Test Plan Template to create a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. After you have downloaded the file, modify it to suit your testing needs.

Click the following link to download the template: [ReleasePreviewTestPlan\\_Template.xls](#).

The following sections provide a plan for testing your account thoroughly during the release preview period:

- [Test Your Business Workflows](#)
- [Test Critical Reports](#)

## Test Your Business Workflows

To make the most of the release preview period, you should identify, document, and test the key business workflows in your production account. Testing your critical workflows and reports, and reporting any issues you encounter is the most important aspect of release preview. Compile a list of the critical task paths your employees follow to get their jobs done and create a document for each process.

You should use a spreadsheet application and create a separate worksheet for each common daily task. Use this spreadsheet as your checklist during testing. Although this is not required, it may help you be more efficient and organized during future release preview testing.

Download the Release Preview Test Plan Template to create a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. After you have downloaded the file, modify it to suit your testing needs.

Click the following link to download the template: [ReleasePreviewTestPlan\\_Template.xls](#).

At minimum, each business workflow documented should contain the following components:

- **Business Workflow Name** – Provide a unique name.
- **Role** – Specify the role to use when testing the process.
- **Email** – Specify the email address to use for testing.
- **Steps** – Provide the detailed navigation required to accomplish the desired task.
- **Results** – List expected results.



**Important:** Whenever possible, try to incorporate users with different roles when testing your business workflows (Finance, Project Manager, Resource Manager, Consultant or End User, for example), rather than testing only as an account administrator. If it is impossible to procure those resources for testing, you can use the Proxy/Log-in as feature to test 'as them'. You may find critical defects that impact specific roles but do not impact account administrators.

## Suggested Areas for Testing

Critical workflows depend on your specific business requirements. The following list is provided for reference only. Some of the following areas may not be applicable to your account and you may have critical workflows that are not included in this list.

- Timesheet entry
- Expense entry
- Approvals (approve time, expense, invoices, and other transactions set up for approvals on your account)
- Billing and invoicing (run billing for a project, create an invoice)
- Creating and updating bookings or staffings
- Viewing, creating and updating bookings or staffings on the chart, worksheet, or planner.
- Creating and updating project plans, tasks and task assignments
- Running charge and revenue projections manually. Make sure they are generated properly using a report – See [Test Critical Reports](#).
- User event scripts on any form (if you are using the OpenAir user scripting platform).

## Test Critical Reports



**Important:** The release preview environment is not designed for production level usage and data processing. You should modify any reports which typically run longer than 5-10 minutes before you run them on your release preview account. Use filters to look at a single day or otherwise limited data set.

The release preview is a copy of your production account as of a certain date, so the data in it may not be the same as in your production account. You should generate reports using date ranges that can be compared between both accounts. Ensure that the report does not encompass newly added or updated data on your production account that is not reflected on your release preview account. Release preview accounts cannot be refreshed or recreated during the release preview period.

You should use the following steps to test all reports, not only large reports.

### To test critical reports:

1. Identify the reports you want to test.
2. For each report you want to test, do the following:
  - a. In your release preview account, modify the report to look at limited data set for a date period that has comparable data in both your release preview and production accounts.
    - Change the Date filters such that the report period is only 1 day or 1 week.
    - Specify a time period for which no data was recently added or updated on your production account. For example, pick a date 6 months ago.
  - b. Save a copy of the report, and run it. Download it as a CSV file and retain this CSV file on your computer.
  - c. In your production account, run the report with the same date range that you used in your release preview account.
  - d. Compare the results.
  - e. If you need to report an issue to OpenAir Customer Support, ensure that you keep copies of the saved report in both your release preview and production accounts.



**Tip:** To save some steps for future release preview testing, keep a copy of the modified report in your production account.