



NextGen Upgrade: Testing Checklist

For Test environment validation and readiness for Production upgrade.

Purpose

This checklist is used to validate the Betterworks NextGen experience in

The goal is to confirm that:

- Core workflows function as expected
- Navigation and role access are correct
- Walkthrough guides and internal training materials align with the n
- Admins, managers, and employees feel confident in the experience

Completion of this checklist supports readiness for Production upgra

Roles Involved

- **Program Owner / HR Admin:** Overall coordination and sign-off
- **System Admin:** Configuration, permissions, reporting
- **Manager Testers:** Real-world manager workflows
- **Employee Testers:** Day-to-day usage validation

Testing Status Key

- Not Started
- In Progress
- Complete
- Issue Identified (logged for follow-up)

Final Readiness Check

- 0 All critical workflows tested
- 0 Training, comms, and walkthrough content updated

- 0 Known issues logged and addressed or accepted
- 0 Stakeholders aligned to proceed
- 0 Approval to move to Production & comms ready

a test environment before transitioning the Production environment.

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Admin & Configuration

Item	Area
1	Login & Access
2	Roles & Permissions
3	Navigation
4	Platform Settings
5	Reporting Access
6	Data Visibility
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Testing

What to Validate	Owner
Users can log in successfully	
All Super Admins and HR Admin roles are set up correctly	
All modules and features are enabled and appear as expected	
Configuration settings match current Production environment	
Reports are accessible and functioning correctly	
Historical data appears intact	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Goal Testing

Item	Area
1	Create Goals
2	Edit Goals
3	Goal Alignment
4	Progress Update
5	Comments
6	Visibility
7	Filters
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What to Validate	Owner
Employees and managers can create goals	
Changes save and display correctly	
Parent/child relationships display correctly	
Progress displays clearly	
Comments save correctly	
Appropriate visibility by role	
New filters can be saved and deleted correctly	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Conversation Testing

Item	Area
1	View Conversations
2	Templates
3	Add Notes
4	Completion
5	Notifications
6	Workflows
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What to Validate	Owner
Active and historical conversations visible	
Templates render correctly	
Notes can be added and saved	
Conversations can be completed appropriately	
Notifications behave as expected	
New workflows work as expected	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Feedback Testing

Item	Area
1	View Feedback
2	Templates
3	Completion
4	Notifications
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What to Validate	Owner
Active and historical feedback visible	
Templates render correctly	
Feedback can be completed appropriately	
Notifications behave as expected	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Meetings Testing

Item	Area
1	Agenda Topcs
2	Action Items
3	AI Summary
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What to Validate	Owner
Agenda topics load and save correctly	
Action items persist correctly	
AI Meeting summary captures data accurately	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Recognition Testing

Item	Area
1	View Recognition
2	Completion
3	Notifications
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What to Validate	Owner
Active and historical recognition visible	
Recognition can be completed appropriately	
Notifications behave as expected	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Homepage & Insights Test

Item	Area
1	Homepage
2	Manager View Homepage
3	Insights
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What to Validate	Owner
Employee view of Homepage captures data and to-dos accurately	
Manager view of Homepage captures data and to-dos accurately	
Dashboards in Insights captures data accurately	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Homepage & Insights Test

Item	Area
1	Walkthrough Guides
2	Screenshots
3	Quick Start Guides
4	Internal training
5	Support Content
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What to Validate	Owner
Guides, badges and steps align to NextGen UI	
Screenshots in enablement and support content up to date	
Content reflects changes and new layout	
Decks/materials accurate	
FAQ and help links are updated / still apply	

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Notes
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Issue Log & Resolution

Issue #	Description
1	
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Logged By	Severity
	High
	Medium
	Low

Status
Not Started
In Progress
Complete
Issue Identified (logged for follow-up)

Resolution
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