eInduction Report Testing

Date of Test: _____

The below test process will allow a tester to verify that a Payment error reported on the eInduction tab of the mailer scorecard is a valid error. Payment errors are logged at the container.

In this test, we will validate that the # Payment errors reported matches between summary and drill views for the eDoc submitter scorecard, Mail Owner Scorecard, Mail Preparer Scorecard. We are also testing that Payment errors are logged correctly, and reporting correctly.

This test will also validate that errors reporting above threshold are reporting correctly on the Mail Entry Additional Postage Assessment Report (Internal Users only at this time) and Postage Assessment Summary Report – Information Only.

eDoc Submitter Scorecard

In this test, we will validate that the # of Payment errors reported matches between summary and drill views for the eDoc submitter scorecard. We are also testing that Payment errors are logged correctly.

Major Step	Key Points	Reasons

1. Open eDoc Submitter Scorecard View
 	
_____ eDoc Submitter CRID used
	• Select "I'm an eDoc submitter" Enter information in the (Required) filter fields:
	• Select Timeframe:
	   • Current Month
	   • Previous Month
	   • Select Month
	• Enter the eDoc Submitter CRID in the Search Box
	• Click on the magnifying glass to search for the CRID
	• Highlight the eDoc Submitter name
	• Click on the arrow to move the CRID to the right box under "Selected"
	• Select "Run Document" located at bottom left of screen.
	• Next screen will request to select "Error Type"
	• Select "eInduction"
		The Mailer Scorecard holds all eInduction errors, including Payment errors.

2. Navigate to the Payment errors fields **_____ # of Payment errors reported** **_____ % of Payment errors reported** **_____ $ Additional postage from EIN**	• Located on the eInduction tab • Record the number of payment errors • Record the % of payment errors • Record Additional Postage from Payment errors	The Payment errors field displays a count/% of Payment errors for the selected CRID over the selected timeframe.

errors		
3. Navigate to the "Error Details by Error Type" report _____ **# of Payment errors reported**	The user may drill to the Error Details by Error Type Report in one of two ways: • Left-click on the eDoc Submitter CRID at the top of the column Or the user may • Right-click on the mailer name then select "Drill" and a fly out box will appear to select "View Error Details by Error Type" • On the next screen, select the "eInduction Errors" filter • Click the "Run Report" button left of the screen	The drill reports show a rollup of all errors for the CRID, for the program that was selected in the filter. The count of errors on the drill should match to the count of errors on the scorecard.
4. Open the Mail Quality Job Error Type Report _____ **sum of Payment errors reported** _____ **Selected Job ID** _____ **MID or CRID of Mail Owner** _____ **# of Payment errors reported for selected job**	• Left-click on the "Error Type" to view ALL errors or • Left click on "Error Code" for the specific Payment error type • Select a specific job to validate errors at a more detailed level.	This report will show the errors rolled up to each job. The count of errors here should match the count of the selected job on the previous Mail Quality Job Error Type report (capped at 100).
5. Open the Mail Quality Detailed Error Report _____ **# of Payment errors reported for selected job**	• Left-click on the "Error Type" or "Error Code" for the selected Payment error	This report shows full details for each error in the selected job. The count of errors here should match the count of the selected job on the previous Mail Quality Job Error Type report (capped at 100).
6. Verify that all fields are populated	• Note: Some data may not be included if it is not available	Ensure that there is no required data missing from the report
7. Select 5 errors (if available) and review the error details. Note: If fewer than 5 errors review all. 99M_____ 99M_____	• The appointment information is listed in the "Error Data" field • Record Undocumented container barcodes for the 5 errors	We will confirm that the Payment error is correct in the next step

99M_____ 99M_____ 99M_____		
8. Verify Payment errors are valid _____ # valid errors _____ # invalid errors	• Verify that container is unpaid using the EIN Container Management Report in PO! (**Internal Users Only**) Note: Container must be associated to a finalixed postage statement • Validate that Payment error counts logged in steps 2, 3, 4 are same across all report levels.	A mailer is responsible for all valid errors. **External Users** should report invalid errors which require a Help Desk ticket to investigate a possible system issue. **Internal Users** should report any discrepancies to the applicable reporting group to investigate.

Mail Preparer Scorecard (Mail Preparers Only)

In this test, we will validate that the # of Payment errors reported matches between summary and drill views for the Mail Preparer scorecard. We are also testing that Payment errors are logged correctly.

Major Step	Key Points	Reasons

1. Open Mail Preparer Scorecard View
 	
 _____ **Mail Preparer CRID**
 used
	• Select "I'm a Mail Owner or Mail Preparer"
	
	 Enter information in the (Required) filter fields:
	 • Select Timeframe:
	     • Current Month
	     • Previous Month
	     • Select Month
	 • Click Select Preparer CRID box
	 Select "Run Document" located at bottom left of screen.
		The Mailer Scorecard holds all eInduction errors, including Payment errors.

2. Navigate to the Payment errors fields _____ # of Payment errors reported _____ % of Payment errors reported	• Enter CRID of mail preparer in the "Search for:" box • Click on the magnifying glass to search for the CRID • Highlight the mail preparer name • Click on the arrow to move the mail preparer to the right box under "Selected" • Select "Run Document"	The Payment errors field displays a count/% of Payment errors for the selected CRID over the selected timeframe.

	located at bottom left of screen.	
3. Mail Preparer View of Scorecard _____ # of Payment errors reported _____% of Payment errors reported	• Located on the eInduction tab • Select the "eInduction" • Record number of errors reported forPayment in the "Total" column • Select % Metric and record the percentage for Payment errors in the "Total" column	This will display eInduction errors for each mail owner for which the the Mail Preparer is responsible for preparing the mailings. ThePayment error % should be displaying correctly. # of Payment errors divided by the # of eInduction Containers Accepted.
4. Drill to the "Error Details by Error Type" report _____ # of Payment errors reported for identified Mail Owner	The user may drill to the Error Details by Error Type Report in one of two ways: • Left-click on the eDoc Submitter CRID at the top of the column Or the user may • Right-click on the mailer name then select "Drill" and a fly out box will appear to select "View Error Details by Error Type" • Select "View Error Details by Error Type" • On the next screen, select the "EInduction Errors" filter • Click the "Run Report" button on the bottom left of screen	The drill reports show a rollup of all errors for the CRID, for the program that was selected in the filter. The count of errors on the drill should match to the count of errors on the scorecard.
5. Open the Mail Quality Job Error Type Report _____ sum of Payment errors Reported _____ # of Payment errors Reported for selected job. _____ Job ID of Selected Job _____ MID or CRID of Mail Owner	• Left-click on the "Error Type" to view ALL errors or • Left click on "Error Code" for the specific Payment error type • Select a specific job to validate errors at a more detailed level.	This report shows details for errors for every job submitted for the time frame selected.
6. Open the Mail Quality Detailed Error Report _____ # of Payment errors Reported for	• Left-click on the "Error Code" for the selected Payment error	This report shows full details for each error in the selected job. The count of errors here should match the count of the selected job on the previous Mail Quality Job Error

		Type report (capped at 100).
selected job		
7. Validate that errors reported on each report level are consistent	• Check that Payment error counts logged in steps 2, 3, 4 are same across all report levels	Confirm a Duplicate barcode error. A mailer is responsible for all valid errors. External Users should report invalid errors which require a Help Desk ticket to investigate a possible system issue. Internal Users should report any discrepancies to the applicable reporting group to investigate.

Mail Owner Scorecard (Mail Owners Only)

In this test, we will validate that the # of Payment errors reported matches between summary and drill views for the Mail Owner scorecard. We are also testing that Payment errors are logged correctly.

Major Step	Key Points	Reasons

1. Open Mail Owner/Mail Preparer Scorecard View
 	
_____ Mail Owner CRID used
	• Select "I'm a Mail Owner or Mail Preparer"
	Enter information in the (Required) filter fields:
	• Select Timeframe:
	   • Current Month
	   • Previous Month
	   • Select Month
	• Click Select Owner CRID box
	• Select "Run Document" located at bottom left of screen.
		The Mailer Scorecard holds all eInduction errors, including Payment errors.

2. Navigating to the Mail Owner Scorecard View	• Enter CRID of mail owner in the "Search for:" box • Click on the magnifying glass to search for the CRID • Highlight the Mail Owner name • Click on the arrow to move the mail preparer to the right box under "Selected" • Select "Run Document" located at bottom left of screen.	ThePayment errors field displays a count/% of Payment errors for the selected CRID over the selected timeframe.
3. Mail Owner View of Scorecard	• Located on the eInduction tab • Select the "eInduction"	This will display eInduction errors for the mail owner for which the the Mail Preparer is responsible for preparing the mailings.

4. Navigate to the Payment errors fields _____ # of Payment errors reported _____ % of Payment errors reported	• On the eInduction tab • Record the number of eInduction Payment Errors reported on the Scorecard • Select % Metric to view the percentage of Payment errors	The Payment errors field displays a count/% of Payment errors for the selected CRID over the selected timeframe.
5. Drill to the "Error Details by Error Type" report _____ # of Payment errors Reported	The user may drill to the Error Details by Error Type Report in one of two ways: • Left-click on the eDoc Submitter CRID at the top of the column Or the user may • Right-click on the mailer name then select "Drill" and a fly out box will appear to select "View Error Details by Error Type" • Select "View Error Details by Error Type" • On the next screen, select the "EInduction Errors" filter • Click the "Run Report" button • Record the number of Duplicate errors	The drill reports show a rollup of all errors for the CRID, for the program that was selected in the filter. The count of errors on the drill should match to the count of errors on the scorecard.
6. Open the Mail Quality Job Error Type Report _____ sum of Payment errors Reported _____ # of Payment errors Reported for selected job. _____ Job ID of Selected Job	• Left-click on the "Error Code" for the selected Payment error	This report will show the errors rolled up to each job. The sum count of errors from each job should match to the count of errors on the Error Details by Error Type drill and the scorecard.
7. Open the Mail Quality Detailed Error Report _____ # of Payment errors Reported for selected job	• Left-click on the "Error Code" for the selected Payment error	This report shows full details for each error in the selected job. The count of errors here should match the count of the selected job on the previous Mail Quality Job Error Type report (capped at 100).
8. Validate that errors reported on each	• Check that Payment error	We need to open a help desk

report level are consistent	counts logged in steps 2, 3, 4 are same across all report levels	ticket if the errors counts are not the same across all reports.

eInduction Report Testing

Payment Errors

Postage Assessment Summary ReportTest

In this test, we will validate that the # Payment, % Payment, and $ for eInduction errors match between the Postage Assessment Summary Report on the eDoc Submitter scorecard and the Mail Entry Additional Postage Assessment Report in PostalOne! (Currently only viewable by Internal Users).

This test will also validate that errors reporting above threshold are reporting correctly on the Mail Entry Additional Postage Assessment Report (Internal Users only at this time) and Postage Assessement Summary Report – Information Only Report.

Scorecard-eDoc Submitter view to Postage Assessment Detail Report

Major Step	Key Points	Reasons

1. Open eDoc Submitter Scorecard View
 	
_____ eDoc Submitter
 	
CRID used
	• Select "I'm an eDoc submitter"
	Enter information in the (Required) filter fields:
	• Select Timeframe:
	    • Current Month
	    • Previous Month
	    • Select Month
	• Enter the eDoc Submitter CRID in the Search Box
	• Click on the magnifying glass to search for the CRID
	• Highlight the eDoc Submitter name
	• Click on the arrow to move the CRID to the right box under "Selected"
	• Select "Run Document" located at bottom left of screen.
		We will identify the count of Payment errors logged in the previous month.

2. View Postage Assessment Summary Report – Informational Only **_____# of EIN Payment Errors** **_____% of EIN Payment Errors**	• Right Click on the eDoc Submitter CRID • Drill to the Postage Assessment Summary Report • Continue to scroll using the arrow located to the right of	The Postage Assessment Job Report shows errors by error type. **External Users** should open a Help Desk ticket if the error count is incorrect. **Internal Users** should report any discrepancies to the applicable reporting

_____ **Additional Postage Amount for total eInduction errors**	the page until eInduction metrics/percentages/postage are viewable. • Record the number of Payment errors reported • Record number of EIN Payment errors, % Metric and postage amount Do the totals match for # of EIN Payment errors	group to investigate.
3. Postage Assessment validation in PostalOne! **Confirm "Impact from eInduction" report reflects errors from the previous drills.** _____ **Impact from eInduction errors**	**Internal Users only:** • Log onto PostalOne! • Select the Mail Entry Additional Postage Assessment Report • Enter edoc submitter CRID with EIN Payment • Select Execute Search	Does the information on the Postage Assessment Summary Report match the Mail Entry Assessment Report for eDoc submitter. **Internal Users** should report any discrepancies to the applicable reporting group to investigate.
4. Mail Entry Additional Postage Assessment Summary Report	• Left Click on eDoc Submitter CRID link • Select Drill	The Postage Assessment Summary Report lists all of the Postage Assessment details per assessable metric. Compare the additional postage for eInduction on Scorecard when the display becomes available.
5. Mail Entry Postage Assessment Detailed Report (Internal Users Only) $_____ **Additional Postage Amount** $_____ **Adjusted Additional Postage amount** _____ **Assessed Error Count** _____ **Assessed Error or PAF %**	• After the 11th of the month, generate Mail Entry Invoice Summary Report for previous month • Review Additional Postage Amount, Adjusted Additional Postage Amount, Assessed Error Count and Assessed Error or PAF (%) • Record the amounts/Count/%	Invoice Detail Report provides the additional postage impacts for each error type measured within eInduction. Compare the Assessed Error Count to the number of Payment errors above threshold on the Scorecard.
8. Compare error counts per eDoc Submitter on the Scorecard and Postage Assessment Detail Report	• Locate the eDoc Submitter CRID on both reports • Verify that error counts are equal	Does the information on the Postage Assessment Summary Report match the Mail Entry Assessment Report for eDoc submitter. **Internal Users** should report any discrepancies to the applicable reporting group to investigate.