.

|  |
| --- |
| **UATTest Plan TEMPLATE v1.0** |

Project: Donor Drive

Susan G. Komen for the CURE

5005 LBJ Freeway, Suite 250 | Dallas, TX 75244

Phone: 877-465-6636 | Fax: 972-855-4302

1-877 GO KOMEN | [www.komen.org](http://www.komen.org/)

Our vision: a world without breast cancer.

You can help us get closer to a world without breast cancer. [Donate today](http://ww5.komen.org/Donate/DonateOnline.html)

**Table of Contents**

[1 General Information 4](#_Toc297126191)

[1.1 Version History 4](#_Toc297126192)

[1.1.1 Further Revisions 4](#_Toc297126193)

[1.2 Document Sign-Off and Approvals 4](#_Toc297126194)

[2 Introduction 5](#_Toc297126195)

[2.1 Document Description 5](#_Toc297126196)

[2.1.1 Project Summary 5](#_Toc297126197)

[2.1.2 List of New Features 5](#_Toc297126198)

[2.2 Related Documentation 5](#_Toc297126199)

[2.2.1 Business/Functional Requirements 5](#_Toc297126200)

[2.2.2 Technical Solution Design 5](#_Toc297126201)

[2.2.3 QA Test Script(s) 5](#_Toc297126202)

[2.2.4 QA Test Plan 5](#_Toc297126203)

[3 Scope of User Acceptance Testing 6](#_Toc297126204)

[3.1 Applications and Modules Affected 6](#_Toc297126205)

[3.2 Features to be Tested 6](#_Toc297126206)

[3.3 Features Not to be Tested 6](#_Toc297126207)

[4 Responsibilities 7](#_Toc297126208)

[5 Configuration and Setup 8](#_Toc297126209)

[5.1 Hardware 8](#_Toc297126210)

[5.2 Software 8](#_Toc297126211)

[5.3 Test Environments 8](#_Toc297126212)

[5.4 Test Tools 8](#_Toc297126213)

[5.5 Training 9](#_Toc297126214)

[5.6 Office Requirements 9](#_Toc297126215)

[5.7 Security 9](#_Toc297126216)

[5.8 Documentation 9](#_Toc297126217)

[6 Schedule and Milestones 9](#_Toc297126218)

[7 Test Approach 10](#_Toc297126219)

[7.1 Develop Tests 10](#_Toc297126220)

[7.1.1 Analyze Requirements 10](#_Toc297126221)

[7.1.2 Develop Scenarios 10](#_Toc297126222)

[7.1.3 Review Documents 10](#_Toc297126223)

[7.1.4 Derive Acceptance Criteria 10](#_Toc297126224)

[7.1.5 Construct Test Cases 10](#_Toc297126225)

[7.1.6 Requirements Traceability Matrix 10](#_Toc297126226)

[7.1.7 Write Test Scripts 10](#_Toc297126227)

[7.2 Prepare to Test 10](#_Toc297126228)

[7.2.1 Prepare Testing Environment 10](#_Toc297126229)

[7.2.2 Create Test Data 10](#_Toc297126230)

[7.2.3 Agree Entry Criteria 10](#_Toc297126231)

[7.2.4 Complete the Test Procedures 10](#_Toc297126232)

[7.3 Running the Tests 10](#_Toc297126233)

[7.3.1 Item Pass/Fail Criteria 11](#_Toc297126234)

[7.3.2 Reporting Incidents 11](#_Toc297126235)

[7.3.3 Classifying Incidents 11](#_Toc297126236)

[7.4 Review Test Results 11](#_Toc297126237)

[7.4.1 Exit Criteria 11](#_Toc297126238)

[7.5 Change Management 11](#_Toc297126239)

[7.6 Suspension Criteria and Resumption Requirements 11](#_Toc297126240)

[8 Test Deliverables 11](#_Toc297126241)

**Table of Figures**

**No table of figures entries found.**

# General Information

## Version History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date | Description of Revision | Reason for Revision | Prepared By |
| Pilot | 8/11/14 | Creation |  | Fatima A. |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

### Further Revisions

As this project is iterative in nature, this document is a work in progress and will be modified as business rules are discussed and agreed upon. Additional requirement and business-rule definition and/or revisions to this document will generate further document versions. In all cases, agreed changes will be clearly defined in the body of the text or as an addendum to this document, as appropriate.

## Document Sign-Off and Approvals

| Approved by | |
| --- | --- |
| **Komen QA Lead:** Fatima A.  Signature:  Comments: | Date:8/11/14 |
| **Komen UAT Lead:** Fatima A.  Signature:  Comments: | Date: 8/11/14 |
| **Komen Development Lead:** Cheri S.  Signature:  Comments: | Date: 8/11/14 |
| **Komen Project Manager:** Cheri S.  Signature:  Comments: | Date: 8/11/14 |

# Introduction

## Document Description

This document is the User Acceptance Testing (UAT) plan for the **Donor Drive**project. The UAT step will follow successful completion of the QA testing step. UAT will be completed with the goal of ensuring that the system meets business needs. The objectives of this document are to outline the testing strategy and approach for UAT, provide guidance to users performing testing, and to define pass/fail criteria for each test.

### Project Summary

Our Personal Fundraising pages have not been refreshed in more than four years, and advances in technology and social media make this the optimal place to implement the DonorDrive platform. Personal Fundraising pages are a smaller revenue stream that poses the least amount of risk to explore platforms like this to increase revenue.

We would like to take this opportunity to reduce the complexity and negative aspects of our current Personal Fundraising. The current sign up process is long and tedious, not easy to customize and does not follow industry best practices. An optimal solution will make personal fundraising interesting and feel special to the donors/users while giving them opportunities to amplify the message.

### List of Features

Add in any/all high level features being tested

* General Functionality

## Related Documentation

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/default.aspx>

### Business/Functional Requirements

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Scope%20and%20Requirements/PersonalFundraising-BusinessRequirements-cs-20140723_1.2.docx>

### Technical Solution Design

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/System%20Documentation/DonorDrive-DataMap-cs-v3-20140723.xlsx>

### QA Test Script(s)

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Testing/Test%20Cases%20Donor%20Drive.xlsx>

### QA Test Plan

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Testing/DonorDrive_Test_Plan_draft.docx>

# Scope of User Acceptance Testing

## Applications and Modules Affected

|  |  |
| --- | --- |
| **Application** | **Module** |
| Salesforce |  |
| MoneyMaker |  |
| Komen Hub |  |

## Features to be Tested

|  |  |
| --- | --- |
| **Feature** | **Short Description (if needed)** |
| Donation Form |  |
| Gift Matching |  |
| Fundraising Page Creation |  |
| Social Networking | Email/Social Networks |
| Auto Responders |  |
| Donation Management | Refunds/Adjustments/Reassignment |
| Offline Donation Forms |  |
| Data Flow | SaleForce Dataloader to MoneyMaker |

## Features not to be tested

|  |  |
| --- | --- |
| **Feature** | **Reason Excluded from Testing Scope** |
| Basic OOTB functionality | DonorDrive is testing basic functionality |
|  |  |
|  |  |

# Responsibilities

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Responsibilities** |
| **Fatima** | QA Test Lead | * Responsible for major coordination and preparation of all testing efforts for the project * Serves as main source of QA contact during test execution * Responsible for giving sign-off for project to be approved or denied for either further testing or a production release * Responsible for enforcement of rules laid out for project requirements * Provide testing status updates to project team, as needed or requested * Responsible for the logging and tracking of defects |
| **Cheri** | QA Test Manager | * Responsible for approval of all test plans created by the QA resources * Assists with determining time lines and resourcing of QA staff * Able to override any QA member with regard to test sign-off |
| **Cheri** | Development Lead | * Provides main source of contact for QA members when executing test scripts * Responsible for production-based research and validation of all issues encountered during testing when QA staff is unable or unavailable to do so * Provide resolution, possibly with the assistance of other staff members, to all issues detected during the testing process |
| **Vendor** | Development Manager | * Responsible for allocation of development resources * Able to override any development decision made with regard to issue resolution or feature development * Responsible for approval of functional designs and specifications that will be applied during the project |
| **Cheri** | Implementations Lead | * Responsible for setup of environments used during testing * Main contact during all build or deployment issues * Responsible for applying fixes received by development to the testing environment during each testing cycle |
| **Kevin Croy and Christy Sandoval** | UAT Testers | * Responsible for following UAT test plan and UAT test scripts * Will provide final sign-off for business user acceptance |
| **Fatima** | UATLead | * Serves as contact point between the project requestors (users) and the development, QA and UAT staff * Assist in providing any documentation necessary to the business users following QA/UAT test cycles * Assist in interpretation of the business requirements to assure all business rules and needs are meet accurately |
| **Cheri** | Project Manager | * Provides guidance on the overall project * Coordinates and develops project schedule * Liaison with business to ensure participation and ownership * Tracks all project activities and resources, ensuring project remains within scope * Facilitates identifying and bringing closure to open issues * Communicates project status |

# Configuration and Setup

## Hardware

None required.

## Software

Internet browser.

## Test Environments

<http://go.komen.org>

## Test Tools

Defect Tracking and Recording spreadsheet with user scenarios.

## Training

Brief overview of site functionality will be given by QA Lead (Fatima)

## Office Requirements

N/A

## Security

UAT Testers will create their own user IDs and passwords which will be recorded by testing team for their records.

## Documentation

Defect Tracking and Recording Spreadsheet

# Schedule and Milestones

This section defines the TIME constraints on UAT testing.

* Decide from the SCOPE and QUALITY statements what testing tasks need to be done.
* Order the tasks into precedence.
* Estimate the tasks duration and the resources they require.
* Estimate how long UAT will take.

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Start Date** | **Completion Date** |
| UAT Testing | 8/25/14 | 8/26/14 |
| DonorDrive complete fixes | 8/26/14 | 8/28/14 |
| UAT Retest | 8/27/14 | 8/29/14 |
|  |  |  |
|  |  |  |

# Test Approach

This section defines the techniques, approach, and completion criteria to enable the testing tasks to be identified and the amount of time they will require.

## Develop Tests

Tests will be written as scenarios that reflect common uses of site functionality.

### Analyze Requirements

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Forms/AllItems.aspx?RootFolder=%2fProjects%2fPersonal%20Fundraising%2fProject%20Documents%2fScope%20and%20Requirements&FolderCTID=&View=%7b31CD576C%2dE171%2d48D7%2d9AF8%2dD0B8CC49E7AA%7d>

### Develop Scenarios

Based on QA Test Cases and common user scenarios.

### Review Documents

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Forms/AllItems.aspx>

### Derive Acceptance Criteria

95% Pass Rate with no Showstoppers

### Construct Test Cases

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Testing/UAT%20Test%20Cases%20Donor%20Drive.xlsx>

### Requirements Traceability Matrix

Specify the techniques that will be used to record and track back Incidents

* UAT Requirements Document
* Defect Tracking Spreadsheet (<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Testing/UAT%20Test%20Cases%20Donor%20Drive.xlsx>)

### Write Test Scripts

<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Testing/UAT%20Test%20Cases%20Donor%20Drive.xlsx>

## Prepare to Test

In addition to developing the tests a number of other activities need to take place in order to allow UAT to take place.

### Prepare Testing Environment

Testing environment will be url that will have already been tested across different browsers. Full QAT will be performed before hand including crossbrowser and mobile testing.

### Create Test Data

Refunds and Partial Refunds must be manually adjusted in the database until payment gateway Is open.

### Agree Entry Criteria

QA Testing Completed, Development has corrected all defects, testing environment signed off on.

### Complete the Test Procedures

Test Procedures include the Test Scripts required to run the tests and the additional procedures to cover the processes of actually running the tests.

## Running the Tests

UAT Testers will be given a spreadsheet of scenarios with steps to test and a timeframe for testing.

### Item Pass/Fail Criteria

Pass= user is able to perform assigned task and receives expected results

Fail = user is not able to perform assigned task or does not receive expected results

### Reporting Incidents

Incidents will be reported on UAT Test Cases spreadsheet (Defect Tracking sheet) and will have drop downs for pass/fail and severity [1-Minor(Able to work around/Aesthetic), 2-Medium(Should be fixed), 3-Major(Showstopper)]

### Classifying Incidents

Status: Pass/Fail

Severity: 1-Minor(Able to work around/Aesthetic), 2-Medium(Should be fixed), 3-Major(Showstopper)]

## Review Test Results

After the testing has been completed and faults fixed and retested the test results need to be reviewed to make a decision about whether to accept or reject the system.

### Exit Criteria

95% Pass Rate

## Change Management

Please reference requirements document.<http://sgkweb.komen.org/Projects/Personal%20Fundraising/Project%20Documents/Scope%20and%20Requirements/PersonalFundraising-BusinessRequirements-cs-20140723_1.2.docx>

## Suspension Criteria and Resumption Requirements

N/A

# Test Deliverables

The following test documentation will be produced:

* UAT Test Plan – This document deals with what needs to be done in UAT.
* UAT Test Cases – The values input and results expected from tests.
* UAT Test Logs – The results of running the tests.
* UAT Incident Reports – Observations of unexpected results.
* UAT Test Summary Report – Summary of testing.