Dynamic Forms
User Acceptance and Approval Form Instructions
Tuesday, October 3, 2023

The **User Acceptance Test Plan Form** is a critical part of the overall project to capture the overall testing objectives and how testing will be performed. This electronic form captures and describes the overall testing effort, objectives (***what the team is planning to verify/validate***), scope (***what will be tested based on requirements and/or change or will not be tested***), schedule (***how, who and when testing will start and end***) and resources required to complete the integration and production verification testing phase of the project.

Testing completed by the implementation team and the end-users is to ensure a quality product and successful movement into the production environment. **Medium** and **high priority** projects must have a separate test plan/case document with signatures. The test deliverables should include test cases, test results and testing timeline and resources.

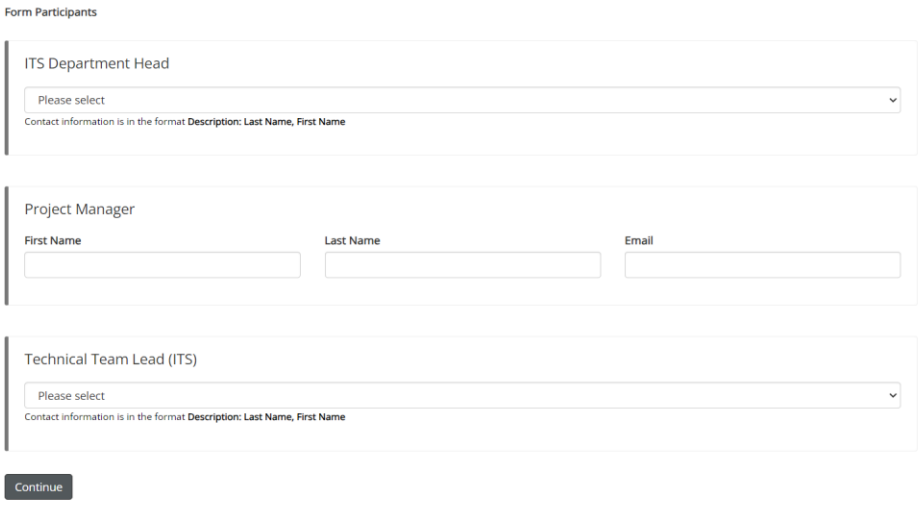
The **initiator** (*Functional Lead*) should begin the process for the form and monitor throughout the final production verification phase. The sign off of the project team members agree that testing meets quality standards and ready to move into production environment.

The steps below are general instructions for using the electronic UAT form. These steps are to be performed after departmental testing is completed for all projects.

The Functional lead for the Project should go to Aggie Hub/Forms/Employee/ITS to find the link to the UAT Form

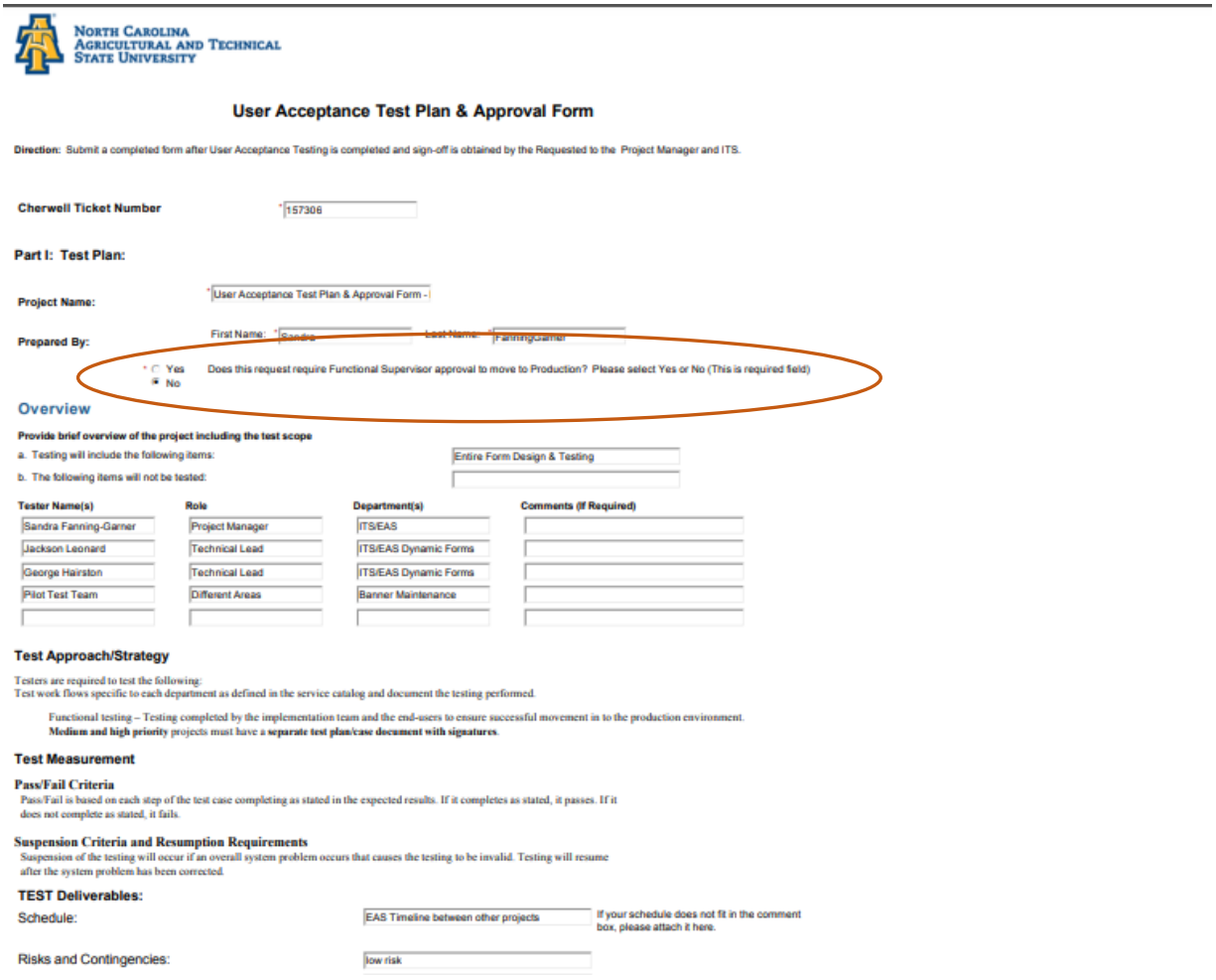
1. Click Link using single sign-on (SSO): *https://hub.ncat.edu/administration/its/forms/index.php*

2. The Form Instruction/Participants Page should appear.



3. Enter requested data on the instruction page (**Note:** *Not all projects will not have a PM therefore the technical lead will fill the PM role)*
4. Select **Continue**
5. Form Page should appear

6. Fill in all required information on the form for **PART I.** **(Note:** A field marked by an asterisk (*) is required.**)**



North Carolina Agricultural and Technical State University

User Acceptance Test Plan & Approval Form

Direction: Submit a completed form after User Acceptance Testing is completed and sign-off is obtained by the Requested to the Project Manager and ITS.

Cherwell Ticket Number * 157306

Part I: Test Plan:

Project Name: * User Acceptance Test Plan & Approval Form -

Prepared By: First Name: * Sandra Last Name: * Fanning-Garner

* ○ Yes ◉ No Does this request require Functional Supervisor approval to move to Production? Please select Yes or No (This is required field)

Overview

Provide brief overview of the project including the test scope

a. Testing will include the following items: Entire Form Design & Testing

b. The following items will not be tested:

Tester Name(s)	Role	Department(s)	Comments (If Required)
Sandra Fanning-Garner	Project Manager	ITS/EAS	
Jackson Leonard	Technical Lead	ITS/EAS Dynamic Forms	
George Hairston	Technical Lead	ITS/EAS Dynamic Forms	
Pilot Test Team	Different Areas	Banner Maintenance	

Test Approach/Strategy

Testers are required to test the following:
Test work flows specific to each department as defined in the service catalog and document the testing performed.

Functional testing – Testing completed by the implementation team and the end-users to ensure successful movement in to the production environment.
Medium and high priority projects must have a **separate test plan/case document with signatures**.

Test Measurement

Pass/Fail Criteria
Pass/Fail is based on each step of the test case completing as stated in the expected results. If it completes as stated, it passes. If it does not complete as stated, it fails.

Suspension Criteria and Resumption Requirements
Suspension of the testing will occur if an overall system problem occurs that causes the testing to be invalid. Testing will resume after the system problem has been corrected.

TEST Deliverables:

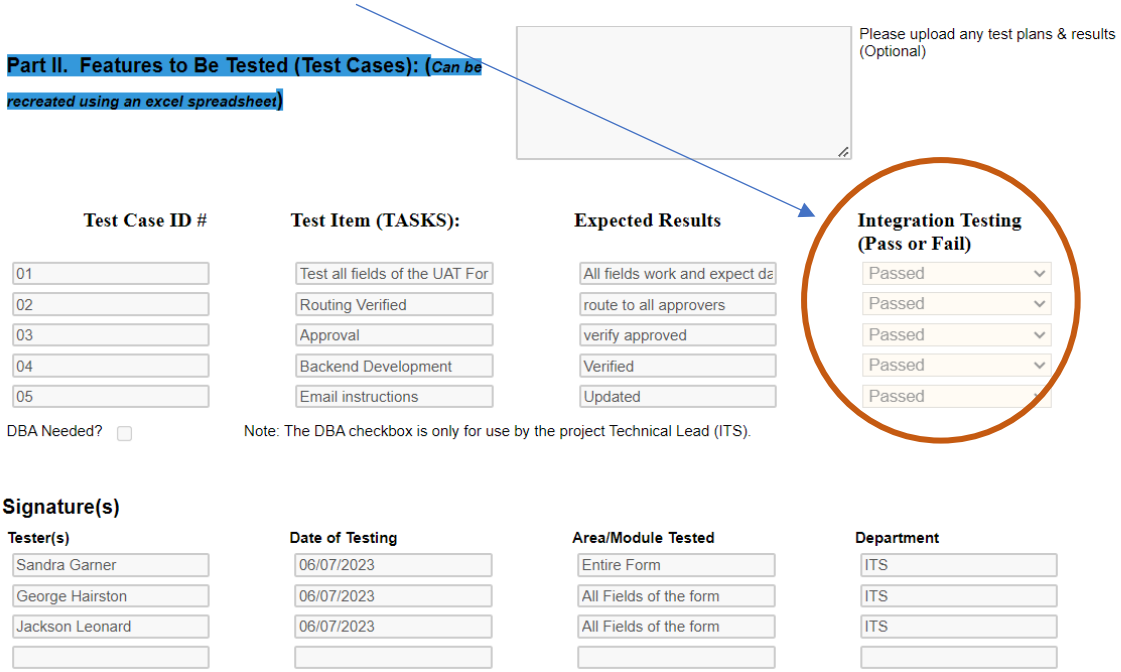
Schedule: EAS Timeline between other projects — If your schedule does not fit in the comment box, please attach it here.

Risks and Contingencies: low risk

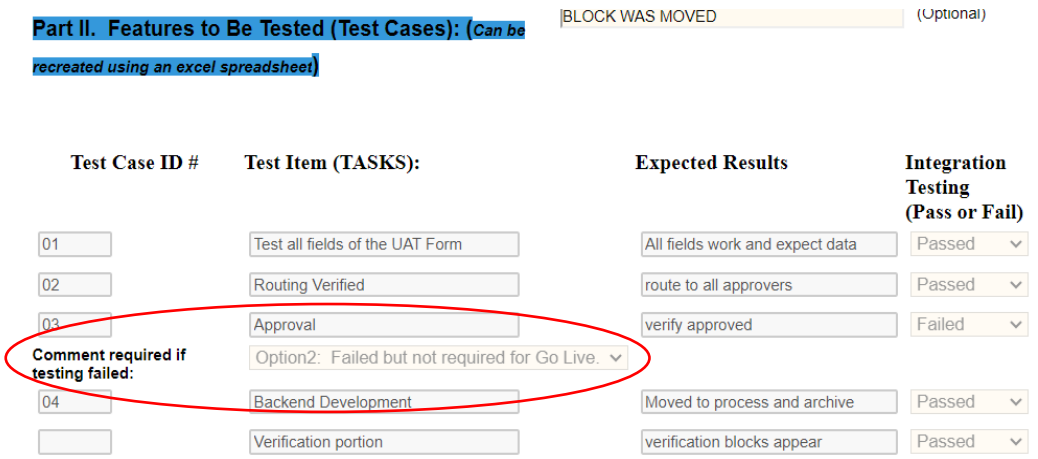
7. Continue to **Part II – FEATURES TO BE TESTED** of the form and complete filling in the information.

8. Fill in and/or attach test results with the final testing information to include the plan, test results, etc. For **cycle 1, Integration Testing** appears on the form under **Integration Testing Phase (Pass or Fail).**

PART II OF THE FORM



9. Use the section: '**Comment required if testing failed**' for testcases that do not pass with justification or do not pass with acceptance of the risk of the failed testcase. This section should be used for **exceptions only**.



10. After completion of PART II above – **Integration Testing (Cycle I)** can be signed.
11. Hit submit form. The initiator will receive a confirmation email.

Form submission confirmation

IT its@ncat.edu
To Sandra Fanning-Garner

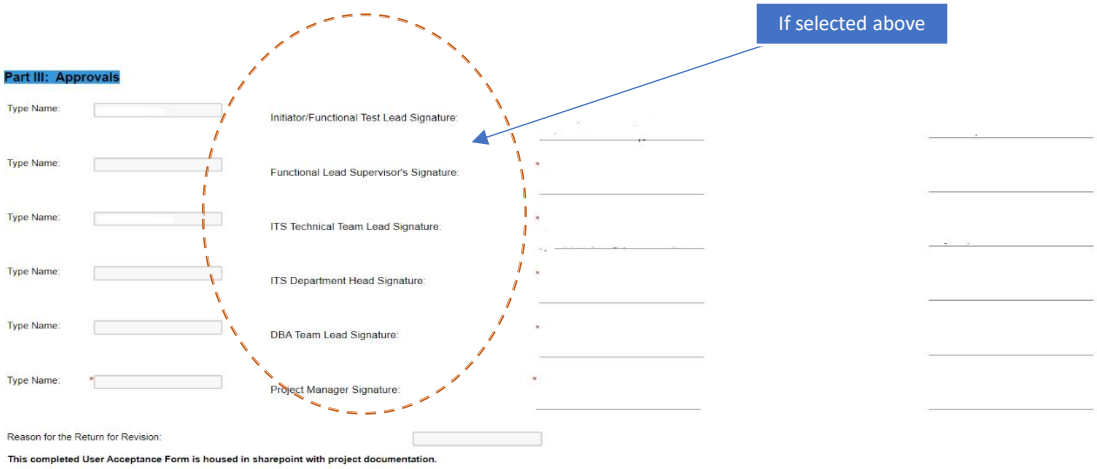
Reply | Reply All | Forward | ...

Tue 6/13/2023 11:40 AM

This is an e-mail confirmation of receipt of your User Acceptance Test Form & Approvals recently submitted.

PLEASE NOTE: This message was automatically generated. Please do not respond to this email address: it is used only by an automated system and is not monitored for responses.

12. AFTER **PART II** is completed, the form is then routed to the following participants for approval. Each participate will receive an email with link to select:



13. Once the DBA signs off and moves the code to production, the PM you designated on the instruction screen will receive the following email.

Dynamic Forms: User Acceptance Test Form & Approvals - Signature Request

IT its@ncat.edu
To Sandra Fanning-Garner

Reply | Reply All | Forward | ...

Tue 6/13/2023 1:22 PM

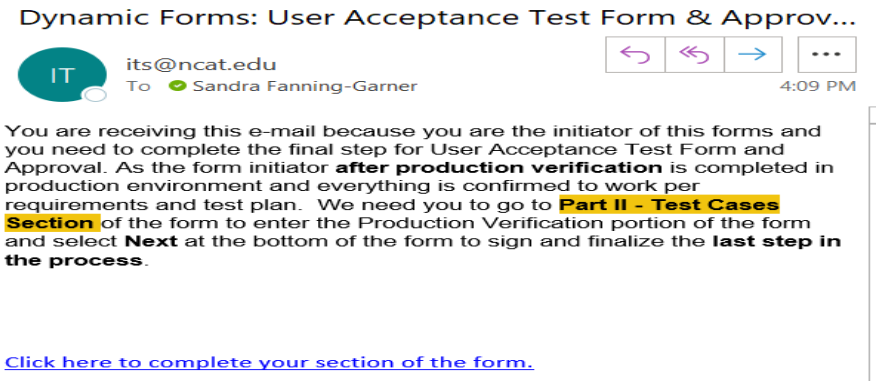
This email is being sent to you as the **Project Manager/Team Lead** please sign for final deliverable for User acceptance testing approval. The ITS technical deliverable(s) have been approved to move to production.

The final step in the process is to have the **Initiator** or **Functional Lead** sign off that production verification is completed and that will finalize the overall User Acceptance Testing process.

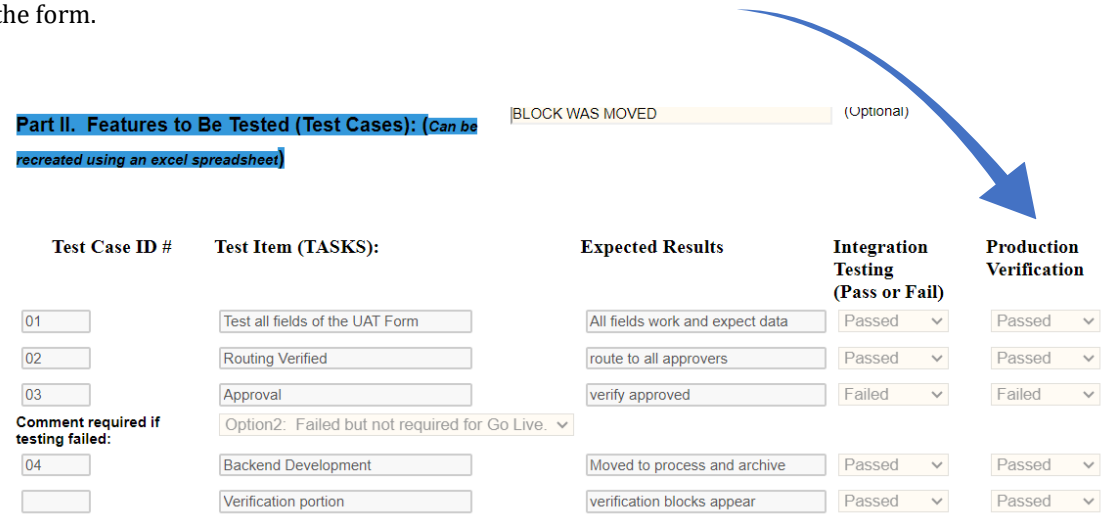
Click here to complete your section of the form.

14. After the code is moved to production by the data base administrator (DBA), the next step is the **Production Verification (Cycle II)** phase of the project. The PM must sign the form and the initiator can proceed with production verification.

15. After all ITS signatures have been received for approval, the initiator will receive the email below. The initiator must click on the link in the email to complete the final step: **Production Verification Phase.**



16. The final phase is **Production Verification (Cycle II)**. The initiator should receive an email containing a link to complete this phase. After production verification is completed in NCATPROD or other production environment, the initiator should complete the **Production Verification** section of the form.



17. **THIS IS THE FINAL STEP & EMAIL**

After updating the Production Verification section, select the NEXT button at the bottom of the screen and sign the form. The initiator will receive a final email with his/her name which confirms that that the form has been completed and submitted.