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): <u>https://hub.ncat.edu/administration/its/forms/index.php</u>
- 2. The Form Instruction/Participants Page should appear.

Please select			
entact information is in the format Descriptio	c Last Name, First Name		
roject Manager			
rst Name	Last Name	Email	
echnical Team Lead (ITS)			
Please select			

- 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**

Continue

Form Participants

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 Caroli Agricultural State University	AND TECHNICAL					
	User Acceptane	ce Test Plan & Appr	oval Form	n		
Direction: Submit a completed for	orm after User Acceptance Testing is cor	npleted 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: * Condro	Last Name: Fan	nngoamer			
Overview		ional Supervisor approval to move	to Production?	Please select Yes or No (This is	required field)	>
Provide brief overview of the pr	reject including the test scope					
a. Testing will include the follow		Entire Form	Design & Testin	9		
b. The following items will not be	a tested:			-		
Tester Name(s)	Role	Department(s)	Comments (If	Required		
Sandra Fanning-Garner	Project Manager	ITSIEAS		,		
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 foll Test work flows specific to each d	lowing: lepartment as defined in the service catal	og and document the testing perfor	med.			
	ng completed by the implementation team projects must have a separate test plan/		ssful movement	in to the production environment		
Test Measurement						
Pass/Fail Criteria Pass/Fail is based on each step o does not complete as stated, it fai	of the test case completing as stated in the	expected results. If it completes a	is stated, it passe	s. If it		
Suspension Criteria and Re Suspension of the testing will oc after the system problem has bee	cur if an overall system problem occurs t	hat causes the testing to be invalid	Testing will res	ume		
TEST Deliverables:						
Schedule:		EAS Timeline between other pro	ajects	If your schedule does not fit in t box, please attach it here.	e comment	
Risks and Contingencies:		low risk		1		

- 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

George Hairston

Jackson Leonard

Test Case ID #	Test Item (TASKS):	Expected Results	Integration Testing (Pass or Fail)
01	Test all fields of the UAT For	All fields work and expect da	Passed V
12	Routing Verified	route to all approvers	Passed V
3	Approval	verify approved	Passed V
4	Backend Development	Verified	Passed V
5	Email instructions	Updated	Passed
3A Needed? N	Note: The DBA checkbox is only for use by	the project Technical Lead (ITS).	
ester(s)	Date of Testing	Area/Module Tested	Department
Sandra Garner	06/07/2023	Entire Form	ITS

All Fields of the form

All Fields of the form

ITS

ITS

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**.

Part II. Features to recreated using an excel	Be Tested (Test Cases): (Can be spreadsheet)	BLOCK WAS MOVED	(Optional)
Test Case ID #	Test Item (TASKS):	Expected Results	Integration Testing (Pass or Fail)
01	Test all fields of the UAT Form	All fields work and expect data	Passed v
02	Routing Verified	route to all approvers	Passed v
03	Approval	verify approved	Failed V
Comment required if testing failed:	Option2: Failed but not required for (Go Live. 🗸	
04	Backend Development	Moved to process and archive	Passed v
	Verification portion	verification blocks appear	Passed V

- 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.

06/07/2023

06/07/2023

its@ncat.edu			S Reply	所 Reply All	\rightarrow Forward	
its@ncat.edu To ♥ Sandra Fan	ning-Garner				Tue 6/13/2023 11:40	
Chis is an e-mail confirmati	on of receipt of your Lle	cor Accontanco Tost Form & Ar	oprovals recently	submitted		
This is an e-mail confirmation	on of receipt of your U	ser Acceptance Test Form & Ap	pprovals recently	submitted.		
This is an e-mail confirmation	on of receipt of your U	ser Acceptance Test Form & Ap	pprovals recently	submitted.		
This is an e-mail confirmation	on of receipt of your U	ser Acceptance Test Form & Ap	pprovals recently	submitted.		
		ser Acceptance Test Form & Ap			ed only by an	

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:

	If selected above	
Part III: Approvals		
Type Name:	-	
Type Name: Functional Lead Supervisor's Signature:	_	
Type Name: ITS Technical Team Lead Signature:		24 - 24
Type Name: ITS Department Head Signature:	-	
Type Name: DBA Team Lead Signature:		
Type Name: Project Manager Signature:	_	
Reason for the Return for Revision:		
This completed User Acceptance Form is housed in sharepoint with project documentation.		

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.



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.**

Dynan	nic Forms: Us	ser Acceptance	e Test Form & App	prov
IT	its@ncat.edu To	nning-Garner	$\leftrightarrow \ll \rightarrow$	4:09 PM
you need Approval. production requireme Section o	to complete the f As the form initia n environment an ents and test plan of the form to enter t Next at the botto	inal step for User Act ator after production d everything is confi . We need you to go or the Production Ve	the initiator of this forms ceptance Test Form an n verification is comple- imed to work per o to Part II - Test Cases rification portion of the f gn and finalize the last s	d ≱ted in s orm
Click here	to complete you	r section of the form	n	

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.

Part II. Features to recreated using an excel	Be Tested (Test Cases): (Can be	CK WAS MOVED	(Uptional)	
Test Case ID #	Test Item (TASKS):	Expected Results	Integration Testing (Pass or Fail)	Production Verification
01	Test all fields of the UAT Form	All fields work and expect data	Passed V	Passed v
02	Routing Verified	route to all approvers	Passed V	Passed V
03	Approval	verify approved	Failed V	Failed V
Comment required if testing failed:	Option2: Failed but not required for Go Live.	~		
04	Backend Development	Moved to process and archive	Passed V	Passed v
	Verification portion	verification blocks appear	Passed V	Passed v

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.

Dynamic Forms: Co-Signature Update

its@ncat.edu To ♥ Sandra Fanning-Garner

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		Tue	2:	53 PM

Sandra FanningGarner has completed their portion of the User Acceptance Test Form & Approvals form.

Please visit your Dynamic Forms home page by clicking here.