*Template*

**Acceptance**

**Test Plan**

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**Document History**

Paper copies are valid only on the day they are printed. Contact the author if you are in any doubt about the accuracy of this document.

Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Revision Number | Revision Date | Summary of Changes | Author |
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Reference Documents

Please see the following documents for more information:

|  |  |  |
| --- | --- | --- |
| Document Name | Version | Author |
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1. **Introduction**

The Acceptance Test Plan verifies that the final product (i.e. the system that has been developed) meets the customer’s business requirements. This document outlines the steps required to prepare an Acceptance Test Plan. It also ensures that all components of the system are tested.

* 1. Purpose

Outline the objectives that this document is intended to achieve. Clarify the scope of work involved, especially if there are parts of the system which will NOT be tested or dependencies the Test Department has on other parties. Identify the project’s stakeholders; clarify their role and key contact points.

Please note that you need to complete only those sections that are relevant to your project. Depending on the scale of the project, you may want to remove some sections that are not appropriate, for example, for small-scale roll-outs.

**The purpose of this document is to:**

* Describe the strategy for Acceptance Testing for the [Project Name] to verify compliance with requirements; in other words, the scope of testing should match what’s captured in the Functional Requirement’s document, so that all aspects of the system are adequately tested.
* Ensure all requirements for testing the [System Name] are assessed and planned within the Project Plan
* Demonstrate to all stakeholders that the testing processes to be undertaken will be managed and controlled.
* Define a testing strategy to verify that the system meets the initial requirements.
* Describe each test case for the system verification process.
  1. Scope

Outline the scope of the Acceptance Test Plan. It’s important to highlight what is not within scope so that any ‘assumptions’ from other parties of what should be in the test can be discussed. Under this section, you can also describe the test environment, resources, and specific components or types of testing that are out of scope.

Highlight the potential impact (e.g. project failure) that may arise if these assumptions are not met, for example, if you have to use a different test environment or are not provided with sufficient test data to adequately test the system.

**The scope of this Acceptance Test Plan is:**

* Describe what is to be tested.
* Clarify if the plan is focused on a single system or on multiple products covered.
  1. Output

**Identify the outputs to be produced as a result of Acceptance Testing, such as:**

* Test results – describe format in which they will be delivered
* Recommendations – this may include the risk strategy to be adopted and the impact of such a strategy
  1. System Description

Provide a high-level description of the system and the functions that it is intended to perform. Include details of any areas that warrant special attention or should be highlighted to the Test Manager.

* 1. Key Stakeholders

Identify Stakeholders and their involvement with the Acceptance Testing process.

|  |  |  |
| --- | --- | --- |
| Stakeholder | Reason | Requirement |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Table 1 — Stakeholders

* 1. Relationship to Other Plans

**Describe this document’s relation to other plans, such as:**

* Program Management Plan
* Configuration Management Plan
* Software Quality Assurance Plan
  1. Points of Contact

For large-scale projects, list the main points of contact; capture their contact name, department, telephone number, and e-mail address.

* 1. Methodology, Tools, and Techniques

Describe the tools (or techniques) required for performing testing tasks, e.g. specialist software for managing changes requests.

* 1. Policies, Directives and Procedures

Outline any policies and procedures that apply to this document, such as company policies, security compliance, or, for example, procedures for handing the final product over to the customer.

Identify any external constraints or requirements placed on this document by policies, directives, or procedures.

1. **Test Plan**

This section describes the test plan at a high level. It describes the types of testing that will be undertaken; the level of testing; specialist software required for different parts of the test cycle; the roles and responsibilities of all parties involved.

Note that when new versions of the [System] are delivered during testing, the Testing Team will cease the current cycle and commence a new cycle. Each new cycle will include any retesting for problems corrected.

* 1. Testing Approach

Outline the approach that you will use to perform the testing, for example, the type and level of testing that will occur. If necessary, explain why you are NOT performing certain types of testing. These clarifications should satisfy the document’s reviewers as otherwise they are likely to seek clarification on why these testing types have been omitted.

* + 1. Types of testing

Identify the types of testing that will be performed

* Capacity testing
* Compliance testing
* Functional testing
* Security testing
* Stress testing
* Timing tests
  + 1. Level of testing

Identify the level of testing that will be performed

* Component level
* Integration level
* System level
  + 1. Testing tools, methods, and procedures

Identify the tools, methods, procedures, and standards that will use to perform the tests.

* + 1. Test Data

Identify the source(s) of your test data, including the names of the individuals who will be responsible for providing such material. Without approved test data, you may not be able to test the system correctly. Identify if you require a specific amount of test data, for example, for performance testing.

* 1. Unit Testing

Identify the key points involved in this type of testing. This helps clarify the roles and responsibilities of those involved in this activity. This section may not need to be included for a small project.

* Unit Testing is the responsibility of [Identify Resource] and is managed by the [Test Manager]
* Unit Testing will be done progressively as programs are developed
* Programmers will test their own programs
* For each program or module, a set of test cases will be created with the expected results
* Define procedures for migrating tested programs to the test environment and to ensure migrations are managed and accurate records maintained.
  1. Functional Unit Testing

Identify the key points involved in this type of testing. This helps clarify the roles and responsibilities of those involved in this activity. This section may not need to be included for a small project.

* The [Customer/Business Unit] will performs Functional Unit Testing in the test environment
* The [Customer/Business Unit] user will be familiar with the functional area being tested
* The Developers will provide necessary assistance to the [Customer/Business Unit]
* The Developers will migrate the required programs to the test environment and provide the necessary files, tables and reference data to enable the program to be functionally tested
* Functional Unit Testing will be done progressively during development as functional modules are completed and following completion of programmer unit testing;
* Users will test the program against Design Specifications using test cases based on the specifications.
  1. System Testing

Identify the key points involved in this type of testing. This helps clarify the roles and responsibilities of those involved in this activity.

**When the entire system is tested against the Design Specifications:**

* [Identify Resource] is responsible for System Testing
* [Identify Resource] will prepare a System Test Plan
* [Identify Resource] will perform System Testing
* System and integration testing shall be performed to ensure that the system works as a whole
* System Testing will be performed in the test environment located on the [Identify Server]
* System Testing will be undertaken against selected data
* System Testing will include volume testing and stress testing
  1. Acceptance Testing

**Follow these guidelines when the system is tested against the Design Specifications:**

* Tests against performance criteria, detailed in [Contract] between [Customer/Business Unit] and [Company] will be undertaken
* [Business Unit] Test Manager is responsible for Acceptance Testing
* Acceptance Testing will be undertaken against an Acceptance Test Plan prepared by [Identify Resource]
* Acceptance Testing will be undertaken on the production server located at <Location>
* Test cases will be created for each function
* Tests for data migration functions, security, data access and database integrity will be undertaken
* Backup and recovery procedures will be tested
  1. Problem Reporting

**Describe the following:**

* Problem reporting process – how problems will be recorded and communicated to team members
* Recording test results – how test results will be records, stored, and exchanged with team members
* Tracking problems to resolution – the procedure for tracking problems, once identified, to final resolution, i.e. until the problem has been closed in the tracking system.
  1. Resource Requirements

**Identify the different types of resources you require for this activity, for example:**

* Software requirements, e.g., specialized test software, access to third party systems
* Hardware requirements, e.g., servers, networks, routers
* Human Resources requirements e.g., developers, end users etc
* Documentation requirements e.g., standards, guidelines
* Test data requirements
* Other requirements, such as clean rooms, specific times of day or week to use systems, access to buildings, security clearance etc.
  1. Test Environment

**Describe how you will setup the test environment. Outlines any special requirements that you have for this area, for example:**

* Access to a ‘clean room’
* Authorized access codes
* Security clearance
* Training requirements
  1. Test Identification

**Identify the objective(s) of each respective test. Examples of the different types of tests include:**

* Code tests
* Design test
* Quality tests
* Regression test

**NOTE: Provide at least one Test Case for each type of test.**

* 1. Roles & Responsibility

**NOTE: Remember that Customers/Business Units will also have a role in preparing for and performing acceptance testing activities.**

Describe each person(s) role and responsibility during the test plan. Identify the user groups responsible for all aspects of test plan(s) activities, such as developers, testers, technical writers, and end-users.

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Responsibility** |
| [Name] | Test Manager | Administer Test problem reports and recommend priorities for resolution |
| [Name] | Test Manager | Advise on establishment and training of the Acceptance Test team |
| [Name] | Test Manager | Assign Acceptance Test tasks |
| [Name] | Test Manager | Coordinate Acceptance Testing activities |
| [Name] | Test Manager | Coordinate compilation of, and access to, Acceptance Test data |
| [Name] | Test Manager | Ensure Tests are repeated where necessary |
| [Name] | Test Manager | Ensure that Tests are completed to the agreed schedule |
| [Name] | Test Manager | In the event of serious problems, determine whether to recommend suspension or cancellation of Testing |
| [Name] | Test Manager | Liaise with Project Managers |
| [Name] | Test Manager | Manage, record, and authorize modifications to the Acceptance Test system, documentation, test data, and the Acceptance Test environment |
| [Name] | Test Manager | Oversee development of Test Cases/Scripts |
| [Name] | Test Manager | Prepare the Acceptance Test Plan and procedures |
| [Name] | Test Manager | Recommend formal acceptance of the system to the Project Sponsor |
| [Name] | Test Manager | Report to the Project Sponsor on the status of Acceptance Testing |
| [Name] | Test Manager | Request/obtain the necessary resources |
| [Name] | Test Manager | Review Test results |
| [Name] | System Administrator | Administer and initialize the system configuration data for users and system privileges; work-stations; access to test data. |
| [Name] | System Administrator | Coordinate generation of Test data |
| [Name] | System Administrator | Run data integrity checking routines and monitor data integrity |
| [Name] | System Administrator | Test system administration functions |
| [Name] | System Administrator | Test system documentation |
| [Name] | System Administrator | Verify production support facilities |
| [Name] | User Representative | Assist in development of Test Cases/Scripts |
| [Name] | User Representative | Coordinate the testing activities of Business Unit officers |
| [Name] | User Representative | Coordinate the use of Test data |
| [Name] | User Representative | Liaise with the Acceptance Test Manager |
| [Name] | User Representative | Record and report successful completion of Tests and document problems encountered |
| [Name] | User Representative | Record Test Cases and conditions |
| [Name] | User Representative | Undertake Tests as requested |
| [Name] | User Representative | Assist in development of Test Cases/Scripts |
| [Name] | User Representative | Coordinate the testing activities of Business Unit officers |
|  | Next Role… |  |
|  | Next Role… |  |

Table 9 — Roles and Responsibilities

* 1. Test Responsibility Matrix

This matrix clarifies who is responsible for different parts of the testing cycle. This reduces misunderstandings between the Supplier and the Customer regarding responsibilities for different testing activities.

The [Supplier/Developer] is responsible for all testing, apart from Acceptance Testing. This will be managed by the [Supplier/Developer]’s Project Manager.

The [Customer/Business Unit] is responsible for Acceptance Testing. This will be managed by the [Customer/Business Unit] Test Manager.

The following types of testing will be undertaken:

|  |  |  |  |
| --- | --- | --- | --- |
| Test Type | Responsibility | Resource | Phase |
| Unit Testing | [Supplier/Developer] |  | Software Development |
| Functional Unit Testing | [Supplier/Developer] |  | Software Development |
| System Testing | [Supplier/Developer] |  | System Test |
| Acceptance Testing | [Customer/Business Unit] |  | Acceptance Test |
| Etc |  |  |  |

Table 3 — Test Responsibility Matrix

* 1. Acceptance Test Schedule

Provide a detailed schedule (such as Work Breakdown Structure) which identifies all aspects of the testing activities. This includes details of the start/end dates, key milestones, deliverables, and other aspects of schedule planning, for example resource management.

|  |  |  |  |
| --- | --- | --- | --- |
| Deliverable | Responsibility | Start Date | End Date |
| Planning |  |  |  |
| Develop test cases |  |  |  |
| Testing |  |  |  |
| … |  |  |  |
| Milestone – test results documented |  |  |  |
| …. |  |  |  |
| Milestone |  |  |  |
| …. |  |  |  |
| Milestone |  |  |  |

Table 4 —Test Schedule

* 1. Acceptance Test Report

Describe at a high-level what will be included in the final Acceptance Test Report. In general, this report is generated after the acceptance process is completed.

1. **Testing Prerequisites**

Describe the requirements that must be satisfied - and actions that must be implemented - prior to starting the acceptance testing. The Acceptance Test Manager is responsible for coordinating these activities.

* 1. Quality Assurance

When testing a package:

The [System] must be quality assured in accordance with the manufacturer’s specifications prior to delivery and subsequent Acceptance Testing.

When testing a developed product:

The [System] must adhere to [Company]’s Quality Assurance process prior to delivery and subsequent Acceptance Testing.

* 1. Test Cases

Create Test Cases for all transactions that require testing. The will be developed by the [Identify Resource]. The [Customer/Business Unit] will review the Test Cases to ensure a consistent approach. The [Customer/Business Unit] is responsible for accepting Test Cases.

* 1. Changes to Test Cases

All modified Test Case changes must be reviewed and accepted prior to submission to the [Test Team].

* 1. Collation of Test Data

Describe the process for gathering test data, for example, type of data required; volumes, format, who will gather the data, and who is authorized to sign it off.

1. **Testing Procedure**
   1. Test Schedule

Outline the schedule of tests. This table may be attached as an appendix. Prepare a high-level schedule for each testing task. Identify the resources required for each activity and proposed contingencies for resource replacements.

|  |  |  |
| --- | --- | --- |
| Test Day | Items to be tested | Resource |
| 2008/12/12 |  |  |
| 2008/12/13 |  |  |
| 2008/12/14 |  |  |
| Etc |  |  |
|  |  |  |
|  |  |  |

Table 5 — Schedule

* 1. Test Results

Detail the process of documenting the test results

Summarize the results of your testing. To do this, use the table below to capture details including any relevant comments.

|  |  |  |  |
| --- | --- | --- | --- |
| Test # | Description | Result / Code | Comments |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |

Table 6 — Summary of Results

Test results will be documented by [Identify Resource]. The Test Manager is responsible for collation and review etc.

|  |  |
| --- | --- |
| Code | Description |
| N | Not tested |
| A | Acceptable |
| F | Complete Failure |
| P | Partial Failure |

Table 7 — Test Results Scale

* 1. Review of Test Results

When each test cycle is completed, the Test Team will review and prioritize the test results. The [Resource] will then review the results and sign-off. On completion of testing, all test results will be formally reviewed to ensure the testing has been satisfactorily completed and that the expected results were obtained.

This review is completed when signed-off by the [Customer/Business Unit].

* 1. Corrective Action

Outline the process for performing corrective actions, in other words, how to re-test failed test cases. This iterative process is performed until each test case has been successfully executed.

Detail the process to manage test failure.

* 1. Acceptance and Release

When test results have passed review, the [Customer/Business Unit] will accept the [System]. This process will be managed by the [Customer/Business Unit] Test Manager. Upon acceptance, [Identify Resource] will transfer the [System] to the production environment.

* 1. Suspension of Testing

The Test Manager may suspend testing, for example, if an extremely high percentage of test cases fail indicating that the software is not ready to be properly tested. Suspension automatically ends the current testing cycle. The recommencement of testing begins with a new testing cycle.

* 1. Documentation

Documentation produced as a result of testing activities for [System] will be maintained and managed by the [Identify Resource].

* 1. Conclusion

Summarize the main results of the testing, for example, that the percentage of errors your team encountered was higher/lower that expected.

* 1. Sign-Off Criteria

Identify the individuals authorized to sign off this plan.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Signature Date | Date |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Table 8 — Sign-off Criteria

1. **Appendix A**

Attach any addition information that supplements this plan.

* 1. Glossary of Terms

Identify all terms that establish meaning within the context of the plan.

|  |  |
| --- | --- |
| Term | Meaning |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Table 9 — Glossary of Terms

* 1. Acronyms and Abbreviations

Identify all acronyms and abbreviations used in this document.

|  |  |
| --- | --- |
| Acronym | Meaning |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Table 10 — Acronyms and Abbreviations