

Checklist

UAT

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User Acceptance Testing (UAT) Cycle Checklist

There are a variety of activities that need to be completed during a User Acceptance Testing (UAT) Cycle. While the action items may vary from team to team or project to project, this list can act as a guideline to help you organize the UAT process. Creating a checklist assists the UAT Lead with tracking tasks and enables real time reporting to the project team on the UAT status.

1. UAT Planning

Preparation stage to help you determine if you need a UAT cycle.

- Review impact of new software on business areas
- Review impact of changes to existing software on business areas
- Develop a business case to explain why a UAT phase is necessary

2. Stakeholders

Participants whose area of business will be affected by the new or enhanced software.

- Identify the project stakeholders, their areas of responsibility and the role each stakeholder will fill during the project
- Schedule regular meetings between the UAT Lead and stakeholders
- Define and implement reporting methods

3. UAT Strategy

Project wide documentation that requires sign off by all stakeholders.

- Determine testing scope and objectives
- Outline testing approach
- Identify testing resources
- Establish communication approach
- Select testing environments
- Schedule tasks
- Summarize assumptions, constraints and dependencies
- Predict issues and risks
- Determine the acceptance and sign-off process

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4. Documentation

Various types of documentation need to be completed for UAT.

- Scenarios – provide step-by-step workflow scripts
- Cheat Sheets – provide quick information on how to perform a function quickly
- Defect template – provide a structured approach for recording issues
- Reports – provide updates to the stakeholders on the progress / status of UAT

5. UAT Team

Various team members, such as business analysts, stakeholders, and technical support, who assist with the UAT phase, as well as resources and tools.

- Define the size of, and participants on, the test team
- Define the size of, and participants on, the test script writing team that provides the end users with instruction
- Define business project resources required for UAT support
- Ensure that testing environments are created
- Verify that testing data is prepared
- Identify testing tools
- Determine the UAT cycle location
- Specify the necessary technical support for the UAT phase

6. UAT Training

Participants look to perform UAT with various levels of testing experience so training will be required.

- Determine what type of training will be needed
- Determine who will present this training
- Determine when training will be presented
- Determine who will participate in the training

7. UAT Execution

- Host UAT kickoff for stakeholders
- Complete reporting schedules and processes
- Conduct triage meetings for defects

8. Post UAT

- Create a UAT test report
- Outline lessons learned
- Show testing artifacts delivered to the project