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
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