# Testing Checklist

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| Project Information | | | |
| Project Name |  | | |
| Purpose |  | | |
| Projected Go Live Date: |  | | |
| Project Team | | | |
| Leadership |  | | |
| Project Manager |  | | |
| Testing Coordinator |  | | |
| Documentation |  | | |
| Communications |  | | |
| Technical & Functional |  | | |
| Information Security |  | | |
| Service Desk |  | | |
| Logistics |  | | |
| **TESTING INFORMATION** | | | |
| Dates |  |  |  |
| Times |  |  |  |
| Locations |  |  |  |
| Location Contact Person |  |  |  |
| Location Contact Phone |  |  |  |
| Test Facilitator |  |  |  |
| Technical Support Staff |  |  |  |
| Plan for Technical Support |  |  |  |

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| **TESTING PREPARATION** | | | | | |
| **TESTING COORDINATOR** | | | | | |
|  | Action | Who | | Target Date | Notes: |
|  | Develop high-level plan for testing – include goals, scenarios, and schedule  Template available: [location TBD] |  | |  |  |
|  | Identify the environment that will be used for testing and how testers will reach that environment during testing |  | |  |  |
|  | Identify participant types (for example: employees, managers, administrators, former employees, retirees) |  | |  |  |
|  | Identify the support and technical staff needed for testing |  | |  |  |
|  | Develop communications to reach testers |  | |  |  |
|  | Set dates and times for testing |  | |  |  |
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| **LOGISTICS** | | | | | |
|  | Action | Who | | Target Date | Notes: |
|  | Reserve rooms for participants and for support staff, if necessary |  | |  |  |
|  | Send calendar invitations to support/technical staff needed for testing |  | |  |  |
|  | Recruit participants |  | |  |  |
|  | Log RSVPs from participants |  | |  |  |
|  | Arrange for participant parking, if necessary |  | |  |  |
|  | Plan and purchase participant gifts, if outside the University. Work with Renee Massey to do a cash advance. Allow at least 2 days for the cash advance to be approved (you can purchase the gifts as soon as the cash advance is approved, even if you don’t have the funds yet) |  | |  |  |
|  | Confirm with participants, include date, location, any special information |  | |  |  |
|  | Verify technology needs – computers, mice, power cords, projector, telephone, clicker |  | |  |  |
|  | Make participant attendance sheet |  | |  |  |
|  | Make name tents for participants |  | |  |  |
|  | Make signage for directions to testing location |  | |  |  |
|  | Pack up participant gifts, snacks, parking information, printouts, tape for hanging signs |  | |  |  |
|  | **2 days in advance:** Send out reminder emails to participants and support/technical staff with location, access and parking information, as needed. |  | |  |  |
|  |  |  | |  |  |
| **DOCUMENTATION** | | | | | |
|  | Action | Who | | Target Date | Notes: |
|  | Write testing instructions, test scenarios, test scripts (depending on the complexity of the effort). Be sure to include instructions on how to reach the testing environment.  Template available: [location TBD] |  | |  |  |
|  | Send testing instructions for review (SMEs, Leadership, Service Desk, Project Team) |  | |  |  |
|  | Develop feedback form, if you plan to collect feedback this way. |  | |  |  |
|  | Develop a testing log |  | |  |  |
|  | Print testing instructions for participants |  | |  |  |
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| **TECHNICAL SETUP** | | | | | |
|  | Action | Who | | Target Date | Notes: |
|  | Set up participants in all systems needed for testing (for example ConnectCarolina and TST) |  | |  |  |
|  | Make a plan for how Onyen or Guest ID will be claimed by or for participants, record passwords |  | |  |  |
|  | Unmask participant email, if necessary |  | |  |  |
|  | Clear existing test accounts, if necessary |  | |  |  |
|  | For complex efforts, hold a pilot testing session to work out “kinks” |  | |  |  |
|  | Verify passwords to log into the computers being used for testing |  | |  |  |
|  | If needed, ensure the computers used for testing have the latest software updates (since they may not be on regularly). |  | |  |  |
|  | **2 days in advance**: Verify access to test enviroment for participants (or have testers verify access) |  | |  |  |
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| **DAY OF TESTING** | | | | | |
|  | Action | Who | | Target Date | Notes: |
|  | Take testing box (printouts, parking, snacks, gifts) | |  |  |  |
|  | Post signage for directions | |  |  |  |
|  | Adjust lighting in room | |  |  |  |
|  | Set up testing stations (turn on computers, login, printouts, pen/pencils, paper) | |  |  |  |
|  | Ensure that testing stations can log in to the network and the test system | |  |  |  |
|  | Layout name tents, attendance sheet | |  |  |  |
|  | Post or email sign-in instructions for the system and for the computers being used for testing. | |  |  |  |
|  | Set up other technology (projector, PowerPoint, video, audio) | |  |  |  |
|  | Set up the testing log | |  |  |  |
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| **AFTER TESTING** | | | | | |
|  | Action | Who | | Target Date | Notes: |
|  | Clean up room – remove documentation | |  |  |  |
|  | Write up testing results | |  |  |  |
|  | Final communication and thank you to participants (and let them know if test access will be removed) | |  |  |  |
|  | Let the project team know that testing is concluded so they can clean up IDs, as necessary. | |  |  |  |
|  | Prepare a report for sponsors and the project team | |  |  |  |
|  | Give testing log to business analysts and developers | |  |  |  |