

# KM Implementation UAT Plan

Sample Excerpt



**Prepared by:**  
The Knowledge Compass, Inc.



## Document Metadata

General Information	<b>Project Name</b>	Knowledge Management Solution (KMS) Implementation Project
	<b>Document Location</b>	Project Management Office
	<b>Associated Documentation</b>	KMS System Delivery Specification KMS Project Plan KMS Testing Strategy & Plan

Function	Name	Dept.	Date
Author	Kevin M. O’Sullivan	TKCI	
Reviewer			
Reviewer			
Reviewer			
Reviewer			

Function	Name	Dept.	Date
Approver			

Version	Reason for Change	Date Effective

This document is an example of a User Acceptance Test (UAT) created for a client implementation of a packaged Knowledge Management software solution with select pages included for viewing. Please contact Kevin M. O’Sullivan – [ko@knowledgecompanyinc.com](mailto:ko@knowledgecompanyinc.com) for additional information on KMS implementation services.

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## Introduction

### Purpose

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The purpose of the document is to present the KMS UAT Plan, instructions, and Test Scripts for:

- KMS Agent
- KMS Architect
- KMS System Administrator

Individual UAT tests will be conducted for each of the above KMS components. Testers will only receive a copy of the test scripts applicable to their test.

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### Definition

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The UAT provides a validation that the KMS Application meets TKCI Client user needs in the operational environment.

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### Objectives

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The key objectives of the UAT include:

- Confirm that the key functionality and capabilities of KMS are available and produce the expected results.
- Identify critical faults that could adversely impact the use of the application in the production environment.

This document supports the KMS Testing Strategy and Plan that provides the guidance, policy and standards for development of the KMS UAT Scripts and conducting of the KMS UAT.

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### Scope & Approach

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The UAT Test will include testing the key functions and capabilities of the KMS. The approach is as follows:

- Launch KMS via HP Service Desk Test Environment System
  - Conduct UAT test using the structured Test Scripts
  - Conduct additional ad hoc knowledge base searches based upon tester preferences (optional)
  - Complete test functionality and capability evaluations (on Test Script Template)
  - Complete E-Questionnaire Feedback Template (see forward section)
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## Document Contents

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This document contains the below information for KMS UAT tests.

- Roles & Responsibilities
  - Dependencies
  - Purpose
  - Approach
  - Functions Tested
  - Testing Dates
  - Hardware Requirements
  - Test Data
  - Location
  - Testing Lead
- 

## Quality Standards

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The UAT is guided by the following standards:

- Summit D Project Management Methodology.
- KMS Implementation Project Quality Plan

The UAT is supported by the following documents:

- KMS Agent Module Test Scripts and Assessment Template
  - E-Questionnaire Feedback Template
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## KMS Test Dependencies

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The dependencies for conducting successful KMS UAT tests are as follows:

- Installation and testing of temporary servers in corporate Data Center
  - Installation and testing of KMS Application Software and Database on temporary servers
  - Configuration of KMS System Administration to Requirements for targeted users.
  - Development, testing, implementation and integration of Service Desk changes for KMS integration by Service Desk Engineering and Software Vendor Engineering Team
  - Implement changes to JRUN Web application for Service Desk integration
  - Identification and input of KMS user names and roles into KMS System Administration Access Control facility
  - Import of 'Right Answers' and local data base knowledge content into KMS Knowledgebase
  - Development of KMS Agent and SME E-Learning Training Courses
  - UAT Testers completion of KMS E-Learning Course.
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## Information Reference – Client

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The below were used as reference material in the preparation of this document:

- KM Assessment Deliverable – Implementation & Support Plan
  - Knowledge Management Solution (KMS) Project Charter
  - Knowledge Management Solution (KMS) Project Plan
  - Knowledge Management Solution (KMS) Technical Plan
  - KMS & Service Desk Integration Plan
  - Business Process & Knowledge Touch Point Analysis
  - Business Requirements and Functional Specifications Alignment
  - KMS Deployment Plan
  - KMS Configuration Model
  - KMS Testing Strategy and Plan
  - Pilot Plan, Instructions and Test Scripts
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## Information Reference –Software Vendor

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The below were used as reference material in the preparation of this document:

- Knowledge Desk Summary Sheet
  - Knowledge Desk & ITIL
  - System Administration Manual
  - Agent User Manual
  - Architect User Manual
  - Installation Guide
  - Agent Functional Overview
  - Knowledge Base Segmentation Visibility
  - Knowledge Desk Integration With HP Service Desk 4.5
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## UAT Testing Plan

The KMS UAT as described in the KMS Testing Strategy and Plan is outlined in the below table.

Component	Description
<b>Purpose</b>	Test all KMS Software on the KMS business requirements and functional representations.
<b>Approach</b>	Create test scripts based upon the approved business requirements and functional representations. Test to be conducted by a cross-section of planned KMS users throughout PGI.
<b>Functions Tested</b>	1) Agent Module 2) Architect Module 3) System Administration Module
<b>Testing Dates</b>	Agent Module
	Architect Module
	System Administration Module
<b>Hardware Requirements</b>	Database Server – (RKAMS 318) Web / Application Server (RKAMS 317)
<b>Data Center</b>	Data Center
<b>Software Requirements</b>	Software Vendor Knowledge Desk– Agent Module, Architect Module and System Administration Module
<b>Test Data</b>	KMS System Administrator – Configuration Settings Right Answers Knowledge Content
<b>Location</b>	The UAT Testers will perform the tests at their business location.
<b>Testing Lead</b>	Kevin M. O’Sullivan
<b>Quality Assurance</b>	
<b>Agent Testing</b>	
<b>Architect Testing</b>	
<b>System Administration Testing</b>	
<b>UAT Test Process</b>	Testers will be provided Instructions and Test Scripts to support the testing process for the Agent, Architect, and System Administration Modules.
<b>Test Results &amp; Assessment</b>	UAT testers will return their test results to Kevin M. O’Sullivan for analysis and determination of actions to mitigate identified problems and / or create problem notices and change requests to Software Vendor Results will be returned by email and physical mail.

## KMS Agent - Test Scenarios

<b>Test Scenarios</b>	<p><b>001</b> - KMS Launch From Service Desk  <b>002</b> - KMS Collaboration Pane Navigation  <b>003</b> - Knowledge Session Management  <b>004</b> - Knowledge Base Contribution  <b>005</b> - Knowledge Object &amp; Concept Feedback  <b>006</b> - Help Assistance</p>
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### Review & Approval of KMS – Agent Test Scenarios and Test Scripts

Role	Responsibility	Name	Signature	Date
<b>KMS Project Manager</b>	Author			
<b>KMS IM</b>	Reviewer			
<b>Technical Lead</b>	Reviewer			
<b>Asst. Technical Lead</b>	Reviewer			
<b>Service Desk Engineer</b>	Reviewer			
<b>QA / Validation</b>	Reviewer			
<b>KMS System Owner</b>	Approver			

\* Review only includes KMS / Service Desk Integration Functions

Test Scenario	Module	Test #
KMS Launch From Service Desk	Agent	KMS - 001
<b>Objective</b>	KMS Launch (from Service Desk) and set off initial text search.	
<b>Test Scripts</b>	001.1 - Launch KMS Agent from Service Desk 001.2 - Conduct Initial Search in KMS 001.3 - Narrow Search 001.4 - Save Knowledge Session Experience 001.5 - Resume View of Search Experience from Service Desk to KMS	

**Testing Scenarios Reviewers & Approver**

Role	Responsibility	Name
KMS Project Manager	Reviewer	
KMS IM	Reviewer	
Technical Lead	Reviewer	
Asst. Technical Lead	Reviewer	
Service Desk Engineer	Reviewer	
QA / Validation	Reviewer	
KMS System Owner	Approver	
Signatures of the above are on the summary sheet.		

**UAT Pre-Requisites**

Pre-Requisites	Plan Complete	Actual Complete
1. KMS and Service Desk Applications are installed in a controlled test environment		
2. Technical and KMS project management personnel are trained and available to support the testers.		
3. KMS and Service Desk integration changes have been implemented and successfully tested in the Development Environment.		
4. Test Scripts are completed and have been successfully pre-tested.		
5. Testers have been provided the necessary KMS Role and permissions within KMS Agent.		

## KMS Agent – Test Scripts

### Test – KMS – 001 – KMS Launch from Service Desk with Initial Search

Test Script Details	Expected Result	Actual Results & Comments	Test Result	
			Pass	Fail
<b>001.1 - Launch KMS Application From Service Desk</b>				
1. Open New <b>Call Ticket</b>	Display New Call Ticket			
2. Select Template Category: <b>CALL</b>	Highlight <b>CALL</b> in Pop-up			
3. Select Name: <b>GGGAA, default CA</b>	Highlight <b>GGGAA, default CA</b>			
<p>4. Fill-in <b>Call Ticket</b></p> <p>a. <b>Requester</b> – your name</p> <p>b. <b>Service</b> – select any service</p> <p>c. <b>Impact</b> – select any impact</p> <p>d. <b>Description</b> – enter user problem, as shown below:</p> <p><b><u>Unable to open MS Word Attachment</u></b></p> <p>(Note: Data in the Description Field is the search string for searching the KMS Knowledge Base)</p>	<p>a. <b>Requester, Service, Impact</b> fields populated with data, as entered:</p> <p>b. <b>Description</b> Field populated with:</p> <p><b><u>Unable to open MS Word Attachment</u></b></p>			
5. Change the <b>Default Workgroup</b> to your own workgroup	Workgroup changed to your group			
6. Save Call Ticket – click on <b>Save</b> Button	Call Ticket is Saved in Service Desk			
7. Record Call Ticket #on Post-It	Call Ticket #recorded for later use.			