KM Implementation
UAT Plan

Sample Excerpt

Prepared by:
The Knowledge Compass, Inc.
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 for additional information on KMS implementation services.
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Introduction

Purpose

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.

Definition

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

Objectives

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.

Scope & Approach

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)
Document Contents

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

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

KMS Test Dependencies

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.


**Information Reference – Client**

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

**Information Reference – Software Vendor**

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
- Installation Guide
- Agent Functional Overview
- Knowledge Base Segmentation Visibility
- Knowledge Desk Integration With HP Service Desk 4.5
# UAT Testing Plan

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

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Test all KMS Software on the KMS business requirements and functional representations.</td>
</tr>
<tr>
<td><strong>Approach</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
| **Functions Tested**       | 1) Agent Module  
2) Architect Module  
3) System Administration Module |
| **Testing Dates**          | Agent Module  
Architect Module  
System Administration Module |
| **Hardware Requirements**  | Database Server – (RKAMS 318)  
Web / Application Server (RKAMS 317) |
| **Data Center**            | Data Center |
| **Software Requirements**  | Software Vendor Knowledge Desk – Agent Module, Architect Module and System Administration Module |
| **Test Data**              | KMS System Administrator – Configuration Settings  
Right Answers Knowledge Content |
| **Location**               | The UAT Testers will perform the tests at their business location. |
| **Testing Lead**           | Kevin M. O’Sullivan |

## Quality Assurance

### Agent Testing

### Architect Testing

### System Administration Testing

### UAT Test Process

- Testers will be provided Instructions and Test Scripts to support the testing process for the Agent, Architect, and System Administration Modules.

### Test Results & Assessment

- 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

<table>
<thead>
<tr>
<th>Test Scenarios</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>KMS Launch From Service Desk</td>
</tr>
<tr>
<td>002</td>
<td>KMS Collaboration Pane Navigation</td>
</tr>
<tr>
<td>003</td>
<td>Knowledge Session Management</td>
</tr>
<tr>
<td>004</td>
<td>Knowledge Base Contribution</td>
</tr>
<tr>
<td>005</td>
<td>Knowledge Object &amp; Concept Feedback</td>
</tr>
<tr>
<td>006</td>
<td>Help Assistance</td>
</tr>
</tbody>
</table>

Review & Approval of KMS – Agent Test Scenarios and Test Scripts

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
<th>Name</th>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>KMS Project Manager</td>
<td>Author</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KMS IM</td>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical Lead</td>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asst. Technical Lead</td>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Desk Engineer</td>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QA / Validation</td>
<td>Reviewer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KMS System Owner</td>
<td>Approver</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Review only includes KMS / Service Desk Integration Functions
Test Scenario | Module | Test #  
---|---|---
KMS Launch From Service Desk | Agent | KMS - 001  
Objective  
KMS Launch (from Service Desk) and set off initial text search.  
Test Scripts  
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**

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