

<<client/customer>> <process name>

VERIFICATION TEST PLAN

**Version: #.#**



Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Revision | Author | Description |
|  |  |  |  |

Reference Training

The following guidelines will help complete training for this delivery documentation.

|  |  |
| --- | --- |
| Title | Description |
| Lifecycle Orientation | This is a Blue Prism portal page, providing a brief explanation of the Blue Prism Lifecycle Orientation and related documents.  Blue Prism portal path: Home> Learning> Lifecycle Orientation |
| Delivery Roadmap | This document describes the end-to-end steps in creating and delivering a Blue Prism process solution. The key process phases are outlined from Initial Process Assessment through to Testing.  Blue Prism portal path: Home> Documents |
| Lifecycle Orientation Sample Delivery Documents | All prescribed delivery documents are fully completed. These are referenced within the Delivery Roadmap and provide an example of the content and level of detail required.  Blue Prism portal path: Home> Documents |
| Process Delivery Methodology | The Blue Prism Process Delivery Methodology is a proven means of delivering ongoing business benefit through process automation using a controlled and structured Automation Framework.  Blue Prism portal path: Home> Documents |
| Test Phases Overview | This Test Phases document describes the standard test phases during a Blue Prism project to ensure that automated solutions are delivered into live with the optimum possible level of testing throughout development to ensure that processes are delivered that meet business requirements and contain the minimum possible levels of system exceptions.  Blue Prism portal path: Home> Documents |
| Testing Approach | This document is a guidelines of the testing approaches that should be considered when testing RPA solutions.  Blue Prism portal path: Home> Documents |
| Blue Prism - Introducing Your Process to Live Data | This guide outlines the methods available on how to introduce your process to live data. It should be considered prior to defining your delivery methodology and test approach.  Blue Prism portal path: Home> Documents |

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# Introduction

## Overview

This document provides an outline of how testing will be performed during the Verification Phase of the process configuration.

## Context

The verification phase forms part of configuration, and therefore the automated solution will still be incomplete. The purpose of configuration is twofold: firstly it allows new screens to be configured which can only be reached using live data (eg the "Account Closed" screen can only be seen after closing an account); secondly, it allows a large variety of business scenarios to be tested so that confidence can be established in the solution ahead of Acceptance Testing.

Since scenarios are being verified (and in some cases configured) for the very first time, the solution is not considered "ready" – the verification phase is the means by which the solution will arrive at this state.

## Environment

Verification takes place in the configuration environment, because an agile and rapid improvement cycle will take place – the verification phase is indeed part of the configuration phase.

# Testing Overview

## Testing Scope

The verification phase focuses mainly on Business Scenario Verification – configuring the process to correctly deal with each business scenario, as per the design.

It may also include limited instances of Controlled Failure Tests – verifying the behaviour of the solution in certain situations such as environment failure. Eg what if one of the target applications is unavailable? Eg What if an input source does not match the expected file format?

## Test Requirements

Various resources will need to be organised, such as:

* Sources of both real life and imaginary data representing the defined scenarios
* Subject Matter Experts (SMEs) to help conduct testing and verify outputs
* Sufficient volumes of real-world data to satisfy the Live-Data Testing requirements.

## Progression Criteria

An informal set of criteria will be required to define the end of the Verification Phase. Typically, this will be a minimum set of scenarios and volumes to be worked.

# Testing Scope

## Business Scenarios

Each heading contains a list of scenarios mandated by the customer. Each one is to be tested thoroughly according to the notes provided. The outcome will be verified by the customer.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Description | Expected Income | Required Volume | Notes | Pass? |
| Account Opening | The opening of an account using … etc. | The account should be successfully opened, including X,Y,Z as verified using A,B,C. | Minimum of five cases | To include one male one female and one child. |  |
| Etc – please continue |  |  |  |  |  |

## Controlled Failure Scenarios

As for the business scenarios, the following should be invented and verified by the customer.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Description | Expected Outcome | Notes | Pass? |
| Unrecognised Input Format | The wrong input mechanism is used, resulting in data that cannot be read by the process. | The input file should be forwarded by email to the exceptions team with an explanatory note. | None. | Unrecognised Input Format |
| Etc – please continue |  |  |  |  |

# Test Requirements

## Case Data

<Outline the steps required to prepare and run suitable cases. Specify how different scenarios will be selected, where relevant.>

<Who will take overall responsibility for the data? Will there be deadlines? What happens to unworked cases?>

## Subject Matter Expert

<Detail who will be available and when. What will their responsibilities be?>

## Contacts

<Detail the contact details of key people involved in the testing.>

* Restrictions and Policies

<Detail any rules and/or restrictions on how testing is to take place. Eg testing may only take place between 10am and 4pm; any security restrictions; etc>

## Environment

<List any environmental setup or preparation that will be required – eg PCs which must be set up; network drives which need to be enabled; etc>

## Method and Timescales

<Write here any particular details or complications to be discussed.

For example if all cases have to be worked by 3pm then any test data not fully worked by 1pm will have to be handed over to the manual team to ensure that the cases are worked.>

## Other

<Please continue>

# Progression Criteria

<Usually a simple case of ensuring that the required number and range of scenarios listed in the tables above are covered. Additional requirements may also be listed here>

# Action Plan

Please complete and distribute this list to all interested parties.

|  |  |  |
| --- | --- | --- |
| Action | By Whom | Deadline |
|  |  |  |
|  |  |  |
|  |  |  |