

Blue Prism

<Process Name> Acceptance 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> University |
| 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 |

Contents

[Revision History 2](#_Toc15043168)

[Reference Training 2](#_Toc15043169)

[1. Introduction 5](#_Toc15043170)

[1.1. Overview 5](#_Toc15043171)

[1.2. Context 5](#_Toc15043172)

[1.3. Environment 5](#_Toc15043173)

[2. Testing Overview 6](#_Toc15043174)

[2.1. Testing Scope 6](#_Toc15043175)

[2.2. Test Requirements 6](#_Toc15043176)

[2.3. Acceptance Criteria 6](#_Toc15043177)

[3. Testing Scope 7](#_Toc15043178)

[3.1. Untested Scenarios 7](#_Toc15043179)

[3.2. Business Scenarios 7](#_Toc15043180)

[3.3. Controlled Failure Scenarios 7](#_Toc15043181)

[4. Test Requirements 8](#_Toc15043182)

[4.1. Case Data 8](#_Toc15043183)

[4.2. Subject Matter Expert 8](#_Toc15043184)

[4.3. Contacts 8](#_Toc15043185)

[4.4. Restrictions and Policies 8](#_Toc15043186)

[4.5. Environment 8](#_Toc15043187)

[4.6. Method and Timescales 8](#_Toc15043188)

[4.7. Other 8](#_Toc15043189)

[5. Acceptance Criteria 9](#_Toc15043190)

[6. Action Plan 10](#_Toc15043191)

The information contained in this document is the proprietary and confidential information of Blue Prism Limited and should not be disclosed to a third party without the written consent of an authorised Blue Prism representative. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying without the written permission of Blue Prism Limited.

**© Blue Prism Limited, 2001 – 2019**®Blue Prism is a registered trademark of Blue Prism Limited

All trademarks are hereby acknowledged and are used to the benefit of their respective owners.  
Blue Prism is not responsible for the content of external websites referenced by this document.

Blue Prism Limited, 2 Cinnamon Park, Crab Lane, Warrington, WA2 0XP, United Kingdom  
Registered in England: Reg. No. 4260035. Tel: +44 870 879 3000. Web: [www.blueprism.com](file:///C:\Users\adutton\Documents\Rebranding\Templates\www.blueprism.com)

# Introduction

## Overview

This document provides:

* a minimal set of acceptance criteria for the solution sign-off
* a practical framework outlining the method and scope of the solution testing

The content should be primarily produced by the customer with guidance from Blue Prism where required.

## Context

Acceptance Testing takes place against the backdrop of a largely complete automated solution. A previously agreed set of scenarios will have been thoroughly tested as part of the verification phase, meaning that the main goals of Acceptance Testing will be to:

* Verify that the solution functions in the production environment
* Ensure that the solution performs as expected, in terms of
  + Reliability
  + Ability to handle volume
  + Consistency and accuracy across a large data set
  + Speed, where targets were agreed at design time
* Cover off any remaining scenarios not processed during the verification phase

## Environment

Acceptance Testing takes place in the Acceptance Test Environment, where available, or else in the production environment.

As mandated in the Process Delivery Methodology Policy, where amendments are identified as part of Acceptance Testing, **no changes should be merged backwards from the Acceptance Test Environment into the Configuration Environment;** instead the changes should be implemented in the configuration environment and merged forwards into the Acceptance Test Environment.

The reason for this restriction is that in a busy Automation Program with many processes being delivered in parallel, a backwards merge of new changes into the common library of components will be error prone.

# Testing Overview

## Testing Scope

A number of types of testing will be conducted:

* Business Scenario Testing – This consists of verifying correct operation in a number of scenarios arising from the day-to-day business operation, such as:
  + Cases specified in different input formats
  + Cases requiring a variety of different processing requirements
  + Special behaviour required for certain categories of cases
  + Business Exceptions and scope protection – identifying and reporting on cases considered unworkable or out of scope.
* Controlled Failure Tests – Verifying the behaviour of the solution in certain situations such as environment failure. E.g. what if one of the target applications is unavailable? E.g. What if an input source does not match the expected file format?
* Live Data Testing – The processing of real world data in sufficient volumes to provide confidence that the solution provides the intended value to the business.
* Handoff Testing – Where the process produces output to be used by other teams and/or IT systems, is the output complete? Correctly formatted? Etc. A common example is the exceptions report to be worked by the manual team.

## 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.

## Acceptance Criteria

A suitable set of criteria for sign-off is required. This usually consists of evidence of correct operation under the test scenarios defined, with an acceptable exception rate over an agreed period of time.

# Testing Scope

## Untested Scenarios

<Where rare scenarios could not be tested during the Verification Phase, a decision needs to be made as to whether to allow these scenarios to run, or whether to mark them as exceptions (e.g. to be later included on an ad-hoc basis).>

## 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 Outcome | 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. | The account should be successfully opened, including X,Y,Z as verified using A,B,C. |
| 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? |
| Unrecognized 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. E.g. testing may only take place between 10am and 4pm; any security restrictions; etc.>

## Environment

<List any environmental setup or preparation that will be required – e.g. 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>

# Acceptance Criteria

To be agreed and defined with the input of the customer. This will usually include:

* Evidence of successful operation in the scenarios agreed above
* Reliable operation for a continuous period of N days
* A system-exception rate of 5% or lower. (As business exceptions represent designed and documented behaviour – i.e. correct operation by the automated process – these exceptions do not contribute towards the system exception total.)
* Acceptable performance against speed-based performance targets, (where agreed on project initiation)

# Action Plan

Please complete and distribute this list to all interested parties.

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