

SOLABS QM 10: POST UPGRADE USER ACCEPTANCE TESTING

Guidelines to assist clients with preparation and execution of User Acceptance Testing (UAT)



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Introduction

This document is a guide of recommended UAT testing following an upgrade of the SOLABS QM application. This, along with the review of the qualification package provided by SOLABS, should be completed to confirm that the upgrade/package deployment did not impact the qualified state of the SOLABS QM solution.

Suggested Verifications

1- Core Software functions

A list of all the different functions/pages is provided in [Appendix A](#) and testing can be done by accessing the different pages and performing an action on each of these pages to confirm that they are still loading properly and that all actions can be completed successfully. Refer to [Appendix A](#).

2- System Configurations

Verifying that existing software configurations have not been lost and that no new configurations were wrongly introduced during the upgrade is also recommended. The main configurations to verify (activated or not before upgrade/activated or not after upgrade) would be the following:

Configuration Name	Description
solabs.qm.odms.enabled	Collaborative Review (O365)
solabs.qm.enableTrackChangeOnReview	Word Track Changes feature automatically activated during the Review Cycle
solabs.qm.setWatermarkOnReview	Watermark added to documents during the Review Cycle
solabs.qm.autogenChangeSummary	Generation of a Change Summary between document versions
solabs.qm.sso.external.enabled	SSO Configuration (Azure AD or OneLogin). <i>(Depending on the type of SSO used, any other configurations related to that specific authentication provider could also be verified.)</i>

3- Processes (QM APPS)

If using the Process section in SOLABS QM, it is strongly recommended that the deployed QM APPS be tested to confirm that:

Action:
The Process can still be started
All process tasks can be loaded and confirmed (by starting a new process)
All process tasks can be loaded and confirmed (process started prior to the upgrade)
Process Values Table is correctly generated
Audit Trail is correctly generated
Modify Values pages can be loaded and confirmed
Reassign Tasks page can be loaded and confirmed

4- Reports

It is strongly recommended to verify that the reports (Core and QM APPS Reports / Datasets and SSRS) deployed in the SharePoint site are:

- Displayed in the SharePoint site
- Can be opened
- Are updated (display data from the previous day)

The Core **Datasets** that should be displayed are the following:

CORE DATASETS
Document
<i>Ds Document Attributevalue</i>
<i>Ds Document Metadata</i>
<i>Ds Document Type Inventory</i>
<i>Ds Document Workflow</i>
Setup
<i>Ds Setup Role Inventory</i>
<i>Ds Setup User Inventory</i>
<i>Ds Setup User Role Mapping</i>
Task
<i>Ds Task End User Inventory</i>
Training
<i>Ds Training Activity Inventory</i>
<i>Ds Training End User Activities</i>
<i>Ds Training End User Profiles</i>
<i>Ds Training Job Title Profile</i>
Process
<i>Ds Process Tasks</i>

The Core **SSRS Reports** that should be displayed are the following:

CORE SSRS
Training
<i>Departmental Training Compliance by User</i>
<i>Employee Training History</i>
<i>Employee Training Compliance</i>
<i>Job Title Training Requirements</i>
<i>Training Compliance by Department</i>
<i>Training Compliance Department Status by User</i>
<i>Training Compliance Distribution</i>

CORE SSRS
<i>Training Compliance User Distribution by Range</i>
Document
<i>Detailed Report</i>
<i>Printable Summary</i>
<i>Summary With Doc Control Process Data</i>
<i>Summary With Last Modifier Data</i>

If **QM APPS** (except for the Document Control Process) datasets and SSRS reports exists, the following **datasets** and **SSRS reports** should be displayed (at a minimum):

NOTE: Refer to each of the different **CPUFDS-XXXX-SOL-0XX** (User, Functional and Design Specifications) document for each specific QM APP as the definition of reports varies from one process to the other.

QM APPS
Per Process
DATASETS
<i>Ds ProcessTask Decision</i>
<i>Ds Tasks Data</i>
<i>Ds ExpandedTask Data</i>
<i>Ds Data</i>
<i>Ds Expanded Data</i>
<i>Ds Gr-XYZ Data</i>
<i>DS Gr-XYZ Tasks Data</i>
SSRS
<i>Per Process Step</i>
<i>PXYZ Current Step Listing</i>
<i>PXYZ Listing</i>
<i>PXYZ Statistics per Month</i>
<i>PXYZ Statistics per Parameter</i>
<i>PXYZ Statistics per Year</i>

5- UAT Starting Point

SOLABS provides a series of general tests that can be used and executed as part of UAT verification after an upgrade. The tests will cover the main general functions of the application and confirm that the system is working as expected.

SOLABS' provided test scripts are located in the SOLABS' [E-Room](#) in the **Public** folder, under the **Test Scripts for UATs** folder.

APPENDIX A

PAGE / COMPONENT / FUNCTION
DOCUMENT FOLDER
Create
Modify
Delete
Hide
Unhide
View / Modify Privileges
DOCUMENT
Create
Modify
Change Location
Delete
Lock File
Unlock File
Clear PDF
Metadata to PDF
Hide Document
Unhide Document
Cancel in Process
Get Link
Email Link
Set Workflow
Start and perform review cycle
Start and perform approval cycle
Start and perform retire cycle
Referred Document
Superseded Document
Reason for Change
Modify Description
Remove Links
Audit Trail
Authoring History
Retiring History
View / Modify Privileges
Modify Metadata Only
Document Tree View (Navigation Tab)
Access Tree View

PAGE / COMPONENT / FUNCTION
Access Folder
Access Document
Document Views
Access every view
Access document from the views
TASK GROUP
Create
Modify
Delete
Cancel
Get Link
Email Link
Audit Trail
View / Modify privileges
TASK
Create
Modify
Act On
Return to Originator
Return to Assignee
Delete
Cancel
Get Link
Email Link
Audit Trail
Link Documents
Link Processes
Modify Description
Remove Links
View / Modify Privileges
Task Views
Access every view
Access task from the views
Task Tree View
Access Tree View
Access Task Group
Access Task
CURRICULUM

PAGE / COMPONENT / FUNCTION
Create
Modify
Delete
Duplicate
Get Link
Email Link
Audit Trail
Curriculum Views (Navigation Tab)
Access every view
Access curriculum from the views
TRAINING ACTIVITY
Create
Modify
Delete
Get Link
Email link
View / Add Activity to Profile
View / Assign Trainers
View / Assign End Users
Schedule Users Activity
Record my Training
Record Training From External Record
Provide Second Confirmation
Grade End Users
Link Documents
Link Processes
Modify Description
Remove Links
Audit Trail
Trained Users
Untrained Users
Assigned Users
Training Activities Views
Access every view
Access activities from the views
TRAINING ADMINISTRATION
View by Job Title
Assign by Job Title

PAGE / COMPONENT / FUNCTION
View by Training Activity
Modify by Training Activity
View by End User
Assign by End User
Record for End User
Training Status page
TRAINING STATUS
Access page
Open/Close Details section
Access Training Activity
SETUP
User
Create
Modify
Delete
Deactivate/Activate
Bulk Reassignment
View/Enabled/Disable Notifications
Audit Trail
Role
Create
Modify
Add/Remove End Users
Audit Trail
Custom List
Create
Modify
Delete
Enabled Editing
System Attribute
Create
Modify
Delete
Document Type
Create
Modify
Delete
Deactivate

PAGE / COMPONENT / FUNCTION
Document Workflow Template
Create
Modify
Delete
PDF Rendering Template
Create
Modify
Delete
System Configurations
Modify
Task Type
Modify
Setup Views (Administration Tab)
Access every view
Access setup items from the views
PROCESS
Start
Act On
Modify Values
Reassign Tasks
Cancel
Get Link
Email Link
Move out of Waiting
Modify Description and Purpose (P0007)
Link Documents
Link Processes
Modify Description
Remove Links
Audit Trail
Summary Report
Manage Privileges
Process Navigation Tab
Generate search with different filtering options
Process Views
Access every view
Access process from the views
HOME PAGE

PAGE / COMPONENT / FUNCTION
Search Tab
Generate a Search using Search Public Query
Generate a simple Search
Refine results for documents using different filters
Refine results for processes using different filters
Remember and generate Search Query
Home Page Views
Access every view
Access items from the views
RECENT ITEMS LIST
Access items from the Recent Items list