

# **Federal Student Aid (FSA) Financial Partners Portal Rollout – Release 1**

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## **User Acceptance Test (UAT) Test Plan**

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## **1.0 User Acceptance Test Overview**

The User Acceptance Test Plan provides an overview of the testing necessary to ensure that the functionality delivered meets the needs of the target user identified for the Financial Partners Portal Rollout for Release 1. Included in this document is a list of detailed items that will be incorporated into test scripts and applied in the User Acceptance Testing.

The main purposes of User Acceptance Test was to:

- Serve as formal system acceptance.
- Verify Application Functionality.
- Confirm Content Management and Production.
- Validate all of the above within a user acceptance test environment.

Entry Criteria for User Acceptance Test Execution:

- All applications and application components necessary for cycle to be completed have been inventoried and promoted.
- User Acceptance Test Plan is complete.
- Resources to execute tests are available.
- The User Acceptance Test environment is in place.

Exit Criteria for User Acceptance Test:

- All test cases and conditions have been executed successfully.
- Identified errors and defects have been corrected and re-tested.
- All issues and incidents have been properly documented and worked through the resolution process.
- All reviews were conducted, and that the review yields satisfactory results.

## **2.0 User Acceptance Test Scope**

User Acceptance Test cases will be based on the following:

- New or Current User of Financial Management System (FMS), DataMart and National Student Loan Data System (NSLDS)
- Application Functionality
- Content Management and Production

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### **3.0 Roles and Responsibilities**

User Acceptance Testing involved a Financial Partners Channel user group and the Portals Rollout Testing Team. The primary role for the User Acceptance Testing effort was the Financial Partners Channel User Group with assistance from the Test Team Analysts. The roles are described below:

#### **3.1 Financial Partners Channel User Group**

- Execute the User Acceptance tests.

#### **3.2 Test Team Analysts**

- Assist in the development of the User Acceptance Test Plan.
- Evaluate the User Acceptance test results
- Report all incidents and problems encountered during testing activities.

Ms. Teale Taggart, Ms. Anne Jensen, and Bryan Hykes will serve as the Test Team Analysts.

#### **3.3 Test Team Lead**

- Define a User Acceptance Test Plan.
- Define User Acceptance test cases and scripts.
- Monitor the testing process to identify problems, mitigate potential risks and schedule slippage.
- Review test results with the test team to clarify questions, concerning system functionality and discrepancies with expected results, and ensured that the user acceptance testing activity was a valid and complete exercise.
- Certify that the testing process was comprehensive in scope and complete manage the execution of user acceptance tests.

Erick Middleton will serve as the Test Team Lead

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#### **4.0 Executing and Validating Test Cases**

Each test case was designed as a discrete, executable exercise that would return a predictable result. Test Cases included a setup, input, and expected result sections. Each test case was designed to verify the functionality of a business scenario and described step by step how the business scenario was being tested.

The actual test results were then compared to the expected results to determine if the test ran correctly, “Pass” (or incorrectly, “Fail”) by the Test Team Analyst executing the case.

A “discrepancy” was defined as the difference between what was *expected* to happen and what *actually* happened. Discrepancies were initially evaluated to ensure that they represent system defects. The initial evaluation of discrepancies included:

- Review of the test data;
- Review of the test environment;
- Review of test scripts;
- Review of actual system functioning.

If it was determined that the “discrepancy” represented a system defect, the incident was forwarded to the development team for assessment and proposed solution. After successfully testing the modification, the incident was designated as “closed” by the Test Team Lead.

Validation of a test case occurred when the specific test activity has a status of “Pass” and was reviewed by the Test Team Lead. Completion of User Acceptance Testing was dependent upon each test activity having a status of “pass”.

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## **5.0 Test Scenarios/Cases**

The following is a list of test cases, which will be used to write detailed test scripts. Detailed test scripts with expected results will be documented for each item listed below.

### **5.1 New User Financial Management System (FMS)**

- Download the FMS registration forms.
- Search categorically for guarantors, lenders, servicers and state agencies.
- Execute a Search on “Gear Up”.
- Search for New Federal Registers.

### **5.2 Current User Financial Management System (FMS)**

- Login to Financial Management System (FMS).
- Search alphabetically for guarantors, lenders, servicers and state agencies.
- Execute an Advanced Search for “Forms 2000” information.
- Search for FFEL Variable-rate and Fixed-rate Consolidation Loan Interest Rates.

### **5.3 New User DataMart**

- Download the DataMart registration forms.
- Search by acronym for guarantors, lenders, servicers and state agencies.
- Search for FP Organizational Chart.
- Search for Eastern Region Contact Information.

### **5.4 Current User DataMart**

- Login to DataMart.
- Submit feedback on the Financial Partners Portal site.
- Search for News Information.
- Search the Community Calendar for training.

### **5.5 New User National Student Loan Data System (NSLDS)**

- Download the National Student Loan Data System (NSLDS) registration forms.
- Search the Community Calendar for a conference.
- Register for a conference.
- Search for FP Current Activities Listings.

### **5.6 Current User National Student Loan Data System (NSLDS)**

- Login to National Student Loan Data System (NSLDS).
- Submit a Survey on the Financial Partners Portal site.
- Search for Electronic Announcements.
- Search for Voluntary Flexible Agreement.

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**6.0 ISSUES / QUESTIONS**

The following issues / questions related to the User Acceptance Test Plan.

| <b>Issue</b> | <b>Resolution</b> |
|--------------|-------------------|
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