

Internal Process Automation Tool - UAT Plan

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1. **Introduction:** As the Product Owner, I led User Acceptance Testing (UAT) for the Internal Process Automation Tool (Jan 2024 - Jun 2024) to automate resource allocation for 50+ consulting teams. This 2-3 page UAT plan, part of the 5-page full document, was executed in the final sprint (Jun 2024) with HR and project managers, ensuring a 30% reduction in staffing time and 18% onboarding efficiency improvement. The plan validated key features like skill matching and dashboards.

2. Objectives

- Validate skill-based resource matching accuracy.
 - Confirm notifications are timely and configurable.
 - Ensure allocation dashboard meets HR needs.
 - Verify staffing reports are accurate and exportable.
 - Test role-based access permissions.
3. **Scope** The UAT covers MVP features: skill matching, notifications, dashboards, reports, and permissions. Out-of-scope: AI-based scheduling (deferred to 2025).

4. Test Participants

- Project Managers: 6 from consulting teams.
- HR Leads: 4 from resource management.
- Consultants: 5 end-users.
- Stakeholders: Deloitte IT team.

5. Test Cases

Test Case 1: Skill-Based Matching

- Objective: Ensure consultants are assigned based on skills.
- Steps:
 1. Log into tool as a project manager.

2. Input project requirements (e.g., SQL skills).
 3. Run matching algorithm and review results.
- Acceptance Criteria:
 - Matches complete in under 10 seconds.
 - Skill compatibility score displayed (>80% accuracy).
 - Tested: Sprint 4, Jun 2024.

Test Case 2: Notifications

- Objective: Confirm assignment alerts are sent.
- Steps:
 1. Assign a consultant to a project.
 2. Verify email alert sent to consultant.
 3. Check notification settings.
- Acceptance Criteria:
 - Alerts sent within 5 minutes, include project details.
 - Configurable preferences (e.g., opt-out).
- Tested: Sprint 4, Jun 2024.

Test Case 3: Allocation Dashboard

- Objective: Validate utilization and staffing gap metrics.
- Steps:
 1. Log into dashboard as an HR lead.
 2. View team utilization by project.
 3. Export data to Excel.
- Acceptance Criteria:
 - Dashboard refreshes in real-time.
 - Data matches HR database (via SQL queries).
 - Export completes in under 5 seconds.

- Tested: Sprint 5, Jun 2024.

Test Case 4: Staffing Reports

- Objective: Ensure reports are accurate and exportable.
- Steps:
 1. Generate staffing efficiency report as HR lead.
 2. Verify metrics (e.g., allocation time).
 3. Export to Excel.
- Acceptance Criteria:
 - Metrics accurate (verified against database).
 - Export functional, tested in sprint 5.
- Tested: Sprint 5, Jun 2024.

Test Case 5: Role-Based Access

- Objective: Confirm permissions restrict sensitive data.
- Steps:
 1. Log in as a consultant (non-admin).
 2. Attempt to access restricted HR data.
 3. Log in as HR lead to assign permissions.
- Acceptance Criteria:
 - Non-admins cannot view restricted data.
 - Admins can assign permissions, tested in UAT.
- Tested: Sprint 5, Jun 2024.

6. Testing Schedule

- Duration: Jun 1-10, 2024.
- Location: Remote via Microsoft Teams.
- Feedback: Collected via surveys and Confluence.

7. Risks and Mitigation

- Risk: Matching algorithm errors. Mitigation: Test with mock data.
- Risk: Notification delays. Mitigation: Optimize email server pre-UAT.
- Risk: Permission misconfigurations. Mitigation: Review roles in sprint 4.