

**Stage: Acceptance**

**User Acceptance Test (UAT) Plan**

**Cloud-based Bioinformatics Tools**

**Integrated Invoicing & Billing**

**Document Version: 1.0**

**Date: 24/09/2012**

**Contents**

[1 Document Management 4](#_Toc328390119)

[1.1 Contributors 4](#_Toc328390120)

[1.2 Version Control 4](#_Toc328390121)

[2 USER ACCEPTANCE TESTING 5](#_Toc328390122)

[2.1 User Acceptance Definition 5](#_Toc328390123)

[2.2 UAT Responsibilities 5](#_Toc328390124)

[3 UAT STRATEGY 6](#_Toc328390125)

[4 USER TESTING 7](#_Toc328390126)

[5 UAT RESULTS 8](#_Toc328390127)

[5.1 Open Issues 8](#_Toc328390128)

[5.2 Document Sign Off 8](#_Toc328390129)

# Document Management

## Contributors

|  |  |  |
| --- | --- | --- |
| **Role** | **Department** | **Name** |
| Owner | The Ark | Paul White |
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## Version Control

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| --- | --- | --- | --- | --- |
| **Date** | **Version** | **Author** | **Section** | **Amendment** |
| 24/09/2012 | 1.0 | Paul White |  | Initial version |
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# USER ACCEPTANCE TESTING

## User Acceptance Definition

*User Acceptance Testing should ensure that the application performs at an acceptable level for the Customer.*

## UAT Responsibilities

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| --- | --- | --- |
| **Role** | **Name** | **Responsibilities** |
| Project Manager | Paul White | Communication with users responsible to agree format and scope of UAT  Agree acceptance criteria with the Steering Committee nominee and designated UAT test personnel prior to commencing UAT  Ensure that a detailed test plan is available for test users  Ensure that bugs identified during UAT are logged in the Jira Issues Log  Ensure testing takes place within agreed timeframes |
| Steering Committee Nominee | John Hopper | Ensure appropriate UAT personnel to conduct testing are identified and available.  Signoff final test results |
| UAT Testers | Kelly Aujard | Conduct UAT tests |
|  |  |  |

# UAT STRATEGY

*The User Acceptance Test Plan should be used to record the Steering Committee Nominee(s) sign off of the documented scenarios. It is recommended that detailed test plans be used to record the results of user testing.*

## Test Approach

Test Scenarios The purpose of this test case is to validate the functionality for tracking work items and generating detailed and summary reports for billing purposes.

## Assumptions & Constraints

The following is assumed:

1. The test user can successfully access the test environment via the URL: <https://test.the-ark.org.au/ark>
2. The test user has a valid login to The Ark (internal LDAP user)
3. The test user has been granted access to the Integrated Invoicing and Billing module.

## Test Scenarios

The test scenarios will be developed to match the requirements for Integrated Invoicing and Billing as specified in the Ark Wiki and Jira.

# User Stories

*The Integrated Invoicing and Billing System module requirements are characterised by the following user stories.*

## User Stories

|  |  |
| --- | --- |
| **ID** | BI01 |
| **Title** | Define Work Requests |
| **Narrative** | As the Administrator of a study/lab I want to be able to enter requests for work, such as identifying subjects for a new study or requests for aliquots of DNA |
| **Roles** | LIMS Administrator, Subject Administrator |
| **Preconditions** | Study and Researcher has been defined, Administrator logged in with appropriate access |
| **Details** | 1. Administrator enters new work request and associates it with the Researcher 2. New Work Request created in the system |

|  |  |
| --- | --- |
| **ID** | BI02 |
| **Title** | Define Researchers |
| **Narrative** | As the Administrator of a study I want to be able to define Collaborators/Researchers to the system |
| **Roles** | LIMS Administrator, Subject Administrator |
| **Preconditions** | Study has been defined |
| **Details** | 1. Administrator defines a new Collaborator/Researcher associated with the study in context 2. New Collaborator/Researcher created in the system |

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| --- | --- |
| **ID** | BI03 |
| **Title** | Define new Billable Item Type |
| **Narrative** | As the Administrator of a study I want to be able to define the types of work that can be charged for and set the pricing for each type |
| **Roles** | LIMS Administrator, Subject Administrator |
| **Preconditions** | Study has been defined |
| **Details** | 1. Administrator defines a new Billable Item type and associated charges 2. New Billable Item Type created in the system |

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| --- | --- |
| **ID** | BI04 |
| **Title** | Track Work Completed |
| **Narrative** | As a Data Manager for a study I want to be able to manually record work completed for a Researcher against a pre-defined Work Request |
| **Roles** | Data Manager |
| **Preconditions** | Study, Billable Item Type, Researcher and Work Requests have all been defined |
| **Details** | 1. Data Manager selects the Date and Work Request against which the work will be recorded 2. System populates the Researcher details 3. Data Manager selects the Billable Item Type and system populates per item pricing 4. Data manager selects the quantity 5. New Billable Item Type created in the system |

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| --- | --- |
| **ID** | BI05 |
| **Title** | Generate Reports |
| **Narrative** | As a Data manager for a study I need to be able to generate reports showing what work has been completed |
| **Roles** | Data Manager |
| **Preconditions** | Billable Items have been created in the system |
| **Details** | * 1. Data Manager selects the report required   2. Data manager selects the report constraints, such as Researcher name and date ranges   3. System generates one of the following reports:      1. The total invoiced item type costs related to a researcher      2. The individual billable item costs group by the billable item type related to a researcher      3. The individual invoice item costs grouped by the billable item type |

|  |  |
| --- | --- |
| **ID** | BI06 |
| **Title** | Track Work Completed |
| **Narrative** | As a Data manager for a study I need to be able to generate reports showing what work has been completed |
| **Roles** | Data Manager |
| **Preconditions** | Billable Items have been created in the system |
| **Details** | * 1. Data Manager selects the report required   2. Data manager selects the report constraints, such as Researcher name and date ranges   3. System generates one of the following reports:      1. The total invoiced item type costs related to a researcher      2. The individual billable item costs group by the billable item type related to a researcher      3. The individual invoice item costs grouped by the billable item type |

|  |  |
| --- | --- |
| **ID** | BI07 |
| **Title** | Automatically create Correspondence Billable Items |
| **Narrative** | The system needs to be able to automatically generate Billable Items in response to correspondence activity |
| **Roles** | Data Manager |
| **Preconditions** | Billable Items have been created in the system as a result of a Correspondence record being created |
| **Details** | * 1. Data Manager generates a Correspondence record for a subject   2. Data Manager links the Correspondence record with a predefined Work Request   3. The system generates a non-invoiced Billable Item record. |

# USER TESTING

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| --- | --- | --- | --- |
| **Scenario** | **Passed (Y/N)** | **Date Tested** | **Notes** |
| ***1. Researcher Management*** |  |  |  |
| 1.1 Administrators and other users with access to the module should be able to search for and view the details for defined researchers. Search fields to include:  - Organisation  - First name  - Last Name  - Created Date  - Role (Chief Investigator, Assoc Investigator, Other Investigator, Research Assistant)  - Status (Active, Inactive) |  |  |  |
| 1.2 The administrator should be able to create and maintain the details for external or internal researchers that request services or data/samples. |  |  |  |
| 1.3 The following researcher fields are required:  - Organisation name - mandatory  - Title - mandatory  - First name - mandatory  - Last name - mandatory  - Role (Chief Investigator, Assoc Investigator, Other Investigator, Research Assistant) - mandatory  - Office Phone  - Status (Active, Inactive) – mandatory  - Mobile Phone  - Address – mandatory  - Email  - Fax  - Comment  - Record created date - automated |  |  |  |
| 1.4 The following payment type details are required:  - Billing Type (Cheque, EFT, Cash)  - Account name  - Bank  - BSB  - Account Number |  |  |  |
| ***2. Billable Item Type Management*** |  |  |  |
| 2.1 Administrators and other users with access to the module should be able to search for and view the details for Billable Item Types. Search fields to include:  - Item Name  - Quantity per Unit  - Unit Price |  |  |  |
| 2.2 The administrator should be able to create and maintain the details for Billable Item Types |  |  |  |
| 2.3 The following Billable Item Type fields are required:  - Item Name – mandatory  - Quantity per Unit – this is the number of items that are logically billed together, e.g. as part of a “mailout” - mandatory  - Unit Price – this is the price per logical unit - mandatory  - Quantity Type – this is the actual item of work being conducted, e.g. letter creation - mandatory  - Description |  |  |  |
| ***3. Work Request Management*** |  |  |  |
| 3.1 Administrators and other users with access to the module should be able to search for and view the details for Work Requests. Search fields to include:  - Work Request name  - Requested Date  - Commenced Date  - Completed Date  - Status (Not Commenced, Commenced, Completed)  - Researcher (populated from Researcher list) |  |  |  |
| 3.2 The administrator should be able to create and maintain the details for Work Requests |  |  |  |
| 3.3 The following Work Request fields are required:  - Work Request Name – populated from the list of pre-defined Work Requests - mandatory  - Requested Date - mandatory  - Status (Not Commenced, Commenced, Completed) - mandatory  - Commenced Date  - Completed Date  - Description  - Researcher – the name of the Researcher that made the request – mandatory  - GST rate (if applicable) |  |  |  |
| ***4. Billable Item Management*** |  |  |  |
| 4.1 Users with read access to the module should be able to search for and view the details for Billable Items. Search fields to include:  - Date – date Billable Item was created  - Work Request – selected from available Work Requests  - Researcher –selected from defined Researchers  - Invoiced – Yes or No  - Work Summary - text |  |  |  |
| 4.2 The administrator should be able to create and maintain the details for Billable Items |  |  |  |
| 4.3 The following Billable Item Type fields are required:  - Date – date Billable Item was created - mandatory  - Work Request – selected from available Work Requests - mandatory  - Researcher –populated from the Work Request  - Work Summary – text field  - Billable Item Type – selected from available Billable Item types defined - mandatory  - Quantity - mandatory  - Invoiced – Yes or No - mandatory  - Item Cost – copied from the Billable Item Type but can be overridden by the user  - Total cost – calculated using quantity, item cost and GST  - Attachment – the user may attach a file to the Billable Item record in the system |  |  |  |
| 4.4 Users with Create access to the Correspondence tab in the Subject module should be able to generate a Billable Item when they create a correspondence record. Note that Billable Item records will not be available when updating a Correspondence record. |  |  |  |
| ***5. Reporting*** |  |  |  |
| 5.1 The system should provide a Work Researcher Cost Report which lists the total invoiced Billable Item costs related to a researcher |  |  |  |
| 5.2 The system should provide a Work Researcher Detail Cost Report which lists the individual invoiced Billable Item costs related to a researcher, grouped by the billable item type |  |  |  |
| 5.3... The system should provide a Work Study Detail Cost Report which lists the individual Billable Item costs related to context study grouped by the billable item type related to the study in context |  |  |  |

*Any issues identified during UAT should be added to The Ark Issues Log in Jira. It may be agreed that UAT can be signed off while some issues remain – please add the Jira reference to the appropriate section above if this is the case.*

# UAT RESULTS

## Open Issues

*Please insert a copy of any open issues from Jira, together with details of why these issues remain open at the sign off of the Acceptance Stage.*

## Document Sign Off

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| --- | --- | --- | --- |
| Role | *Name* | *Signature* | *Date* |
| UAT Tester | *Kelly Aujard* |  |  |
| Project Manager | *Paul White* |  |  |
| Steering Committee Nominee | *John Hopper* |  |  |