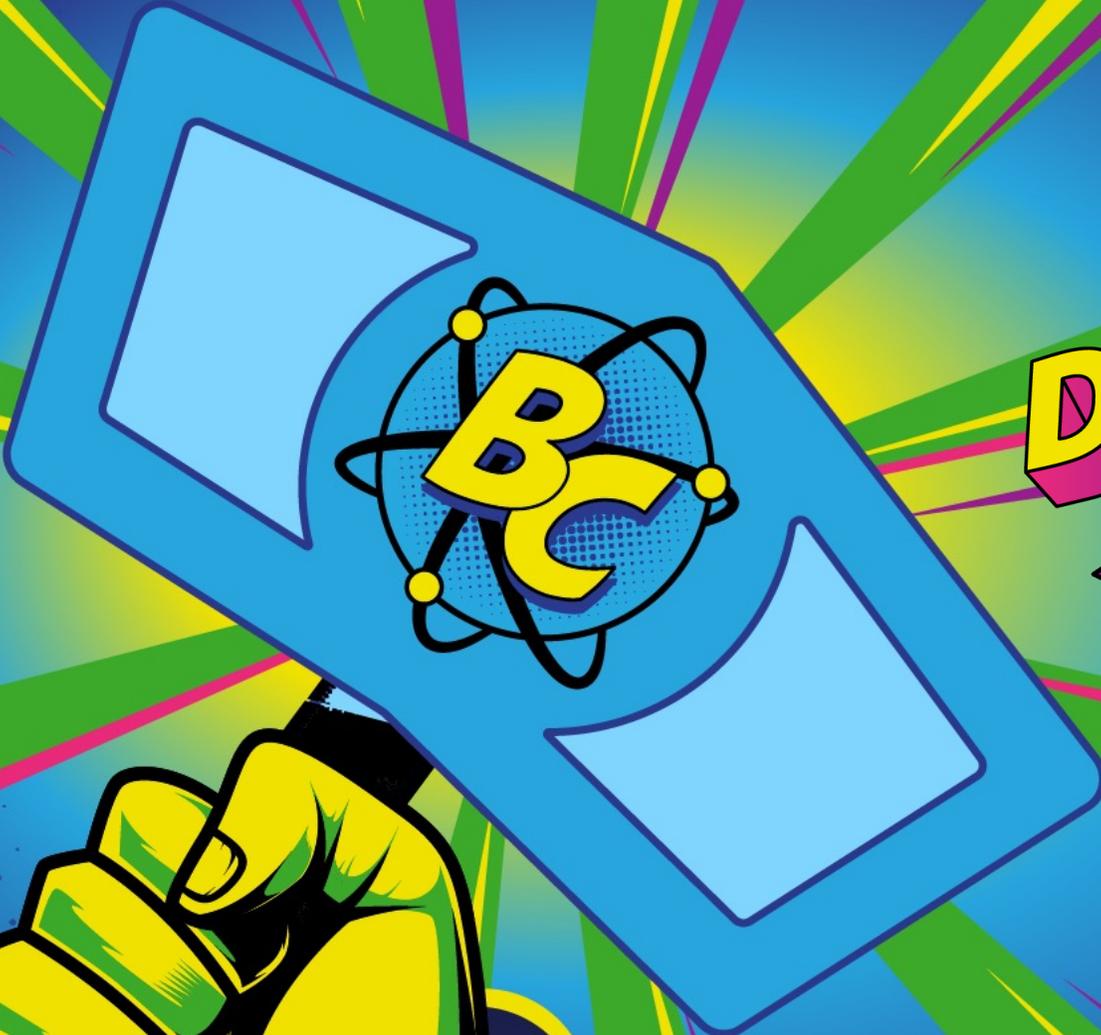


A DYNAMICSCON PRESENTATION



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DYNAMICSCON VIRTUAL

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**BUSINESS
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User Acceptance Testing: What is it and when is it enough?



Recent studies have found that only 14% of software projects are deemed successful and 19% are deemed complete failures. That means that around 65% of all projects considered “Done”.



USER TESTING

When the Project seems to have delivered exactly what was requested, the users find a new way

What is User Acceptance Testing vs User Testing?

User Acceptance Testing is a verification process to determine if the solution matches the expected outcome.

User Testing is a process where the user tests a process but does not take details into account for the desired outcome

Example: Post a Sales Order

- User Testing: Post on Sales Order – Pass
- User Acceptance Testing: Post on Sales Order but shipping costs are missing – Fail

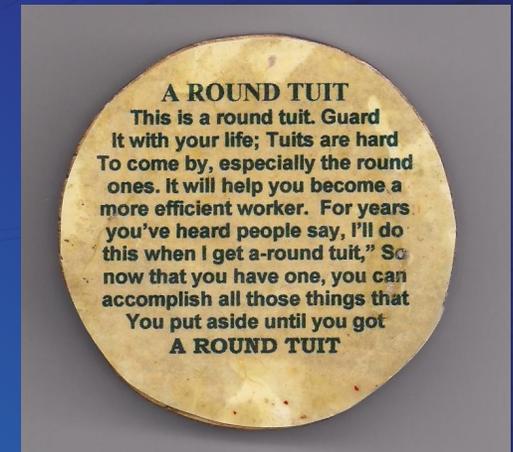
So why is UAT important?

- Budget
 - Delayed Testing = Increased Budget
- Deliverables
 - Go Live
 - Processes changes
- User Buy in



Why does UAT Fail?

- Test Plan
 - Testing not properly outlined
- In correct UAT users
 - Users testing do not have a functional business understanding of the desired outcome
- UAT Environment
 - Environment either out of date or does not have good testing scenarios
- Communication
 - Users do not feel heard and are not as willing to advise where is a concern or issue
- Users not willing to adapt with changes
 - Users are set in their ways and not willing to change or see how the change benefits them



How do we ensure that users are testing?



- Schedule time for each department to test and record the sessions
 - Users are “on the hook” to test during this time and adjust their schedules accordingly
 - When issues are reported examples and steps are recorded in the event it needs to be recreated
- Create sign offs for each area that users are required to update
- Test multiple scenarios

25	
9	UAT - Sales
10	UAT - Purchasing
11	UAT - Receiving Processes
12 ^{PM}	UAT - Warehouse Processes
1	UAT - Shipping Processes
2	
3	

Building a UAT Sign off list

- Determine what defines a successful implementation
- Outline processes that will need to be tested/reviewed
 - Encourage daily users to help build testing scenarios
- Assign key users to “own” each of these tasks
 - Users will be responsible to confirm that these tasks have been completed
- Assign key testing users
 - User who is be doing the testing
- Assign times for users to complete testing



Sample UAT Sign Off



Client UAT Sign off		Please enter "Pass" or "Fail" in Column E			
12/13/2022					
User/Owner	Task	External Testing User	Internal Testing User	Status	Testing Notes
Bob	Review all tabs, fields, columns, factboxes to ensure pertinent info is available		Bob	Pass	
Bob	Review Item Factbox		Jim	Pass	Tested with item 1234
Bob	Confirm Cross references exist		Jim	Fail	Tested with item 1234 & 7890
Bob	Confrim notes are visable		Jim	Pass	Tested on Purchase Order 753
Bob	Create a new note		Jim	Pass	Tested on Purchase Order 753
Sarah	Enter Sales Orders		Sarah	Pass	
Sarah	Enter Sales Order for small parcel (UPS)		Jason	Pass	Tested with SO12345
Sarah	Enter Sales Order for NDA		Jason	Pass	Tested with SO23456
Sarah	Enter Sales Order for Saturday delivery		Jason	Pass	Tested with SO34567
Sarah	Enter Sales Order for LTL shipment		John	Pass	Tested with SO45678
Sarah	Enter Sales Order with no inventory		Jason	Pass	Tested with SO56789
Sarah	Enter Sales Order with partial inventory		Jason	Pass	Tested with SO67890
Bill	Complete Sales Orders		Bill	Fail	
Bill	Create Warehouse Shipment		Bill	Pass	Tested with SO12345
Bill	Create Warehouse Pick		Bill	Pass	Tested with SO12345/SH23456
Bill	Ship small parcel order (UPS)		Kevin	Fail	Tested with SO12345
Bill	Ship LTL shipment		Kevin	Pass	Tested with SO45678
Bill	Ship order complete		Kevin	Pass	Tested with SO12345
Bill	Ship order as a partial		Kevin	Pass	Tested with SO67890
Bill	Post Sales Order		Kevin	Pass	Tested with SO12345
Emily	Post Sales Invoice		Emily	Pass	Tested with SO12345



Common UAT “oops” moments



- Printers that don't work on go-live
 - Users only tested “Print Preview”
- User accounts that have never been activated and they can't log in on day one
- Workstations where the software was never installed
 - Often seen on older versions but some ISVs still have installations that are required per workstation
- Key users are the only ones who completed start to end testing
 - Users have wrong permissions
 - User unsure how to complete task
- All processes not tested
 - Custom processes
 - One off scenarios
- Reports not tested or confirmed

Examples of Failed Implementations

- Nike – Loss of over \$100 Million - Staff not adequately trained before system implementation
- Avon - \$125 Million project – High-level sales reps were not trained on how to operate the system and others had little training and left the company
- Hershey Candies – Unprocessed orders of \$100 million - The company did not provide adequate training to employees before implementation

So how do I know if UAT was successful?

- User Buy In
 - If users are comfortable with the processes your likelihood of being successful is greater
- Go Live without issue?
 - Go Lives tend to have hiccups but how fast can you recover from the hiccup tends to tell you how well you did during UAT
- Management's feedback on the final result
 - Feedback from both the implementation team and users

THANK YOU

