**Project Management Essentials**

**Test Planning Template**

August 31, 2021

# Template Description

## **Purpose**

*The PM Essentials Test Planning Template provides a structure to the testing process when multiple environments, functionalities, and testers are involved. The Template includes factors for larger testing efforts.*

## **How to Use**

*Complete the relevant areas of the Test Planning template and expand where necessary.*

## **Best Practice**

*Test planning should begin as early as the Design phase of the development effort. Some aspects may begin when the requirements gathering is complete.*

Note: The PM Essentials Test Planning Template is customizable as you see fit, on a per project basis, meeting specific needs of the project and/or your organization’s policies. The below sections are suggestions but can be tailored as applicable.

\*\*NOTE: Please remove this page and any content in brackets [ ] when creating your Test Plan.\*\*

Test Plan for [Project Name]

# Plan Information

|  |  |  |  |
| --- | --- | --- | --- |
| **Project name** | **Division** | **Planner name** | **Version date** |
|  |  |  |  |

# Testing Overview and Scope

*Provide a project overview and what the testing will accomplish. Indicate what is in scope and out of scope for the testing effort, including any regression testing intended. If relevant or available, provide the acceptance criteria for the testing.*

|  |  |
| --- | --- |
| **Overview** |  |
| **In scope** (include any regression testing) |  |
| **Out of scope** |  |
| **Acceptance criteria** (optional) |  |

# Environments

*Indicate the technical environments needed for the testing effort.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Testing type** | **Environment name** | **Technical contact** | **Phone number** |
| Development / Unit |  |  |  |
| System / Integration |  |  |  |
| User Acceptance |  |  |  |
| Stage |  |  |  |
| Production |  |  |  |
| Load |  |  |  |
| Accessibility |  |  |  |
| Security |  |  |  |
| [add new rows as needed] |  |  |  |

# Test Support

*Provide the names of those who will be supporting the testers.*

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Phone number** |
|  | Functional test lead |  |
|  | Testing tool lead |  |
|  | Environment support |  |
|  | Test id support |  |
| [add new rows as needed] |  |  |

# Test Scripting

*Provide the names of those who will be developing test scripts for testers to use.*

|  |  |  |
| --- | --- | --- |
| **Script writer** | **Functional area** | **Target date** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| [add new rows as needed] |  |  |

# Testers

*Provide the names of the testers and their areas of specialization.*

|  |  |  |
| --- | --- | --- |
| **Tester** | **Functional specialization or role** | **Phone number** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| [add new rows as needed] |  |  |

# Test IDs

*Indicate the test ids needed and the associated functional areas that it applies to.*

|  |  |
| --- | --- |
| **Test ID** | **Access and functional area** |
|  |  |
|  |  |
|  |  |
|  |  |
|  | [add new rows as needed] |

# Test Training

*Identify any tool, functional, or process training that is needed before testing can begin.*

|  |  |  |
| --- | --- | --- |
| **Tool, function, or process** | **Location of training** | **Date of training** |
|  |  |  |
|  |  |  |
| [add new rows as needed] |  |  |

# Test Schedule

*Indicate the dates when the tests will occur.*

|  |  |  |
| --- | --- | --- |
| **Test type** | **Start date** | **End date** |
| Development |  |  |
| System |  |  |
| User Acceptance |  |  |
| Stage (including smoke, production validation, “dress rehearsal” testing) |  |  |
| Production (smoke, production validation) |  |  |
| Load |  |  |
| Accessibility |  |  |
| Security |  |  |
| [add new rows as needed] |  |  |

# UAT / Functionality testing

*Indicate the dates when functional tests will occur and who will perform them.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Functionality** | **Dependency** | **Tester** | **Test Id** | **Start date** | **End date** | **Location** |
| Testing Kickoff | None |  |  |  |  |  |
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|  |  |  |  |  |  |  |
| [add new rows as needed] |  |  |  |  |  |  |

# Glossary

*Provide definitions for terms as used in this document.*

|  |  |
| --- | --- |
| **Term** | **Definition** |
| Accessibility testing | Testing to verify accessibility, especially in compliance with TGC 2054.451 |
| Development environment | The environment in which coding and unit testing is conducted. |
| Development testing | Testing that occurs during coding. |
| “Dress rehearsal” testing | Testing which may be conducted in stage environments or earlier to obtain lessons learned before the final migration of the solution to the production environment. |
| End-to-end testing | Testing to verify that all components involved in a life cycle of a process will operate. |
| Integration testing | Testing to verify that key software modules will work together. |
| Load testing environment | The environment in which load testing is conducted. |
| Load testing | Testing to verify that the solution will operate to expectations at capacities it is expected to serve. |
| Production environment | The environment through which customers and users conduct their daily business. Also known as the live environment. |
| Production validation | Testing to verify that the solution operates to expectations in the production environment. |
| Regression testing | Testing to verify that all other functionalities continue to operate after the completion of an update, code change, or development effort. |
| Security testing | Testing to verify that the solution is adequately protected against threats, loss, or other risk. |
| Smoke testing | Preliminary testing of main functions to determine if the system is ready for fuller functional testing. |
| Stage environment | An environment which is an exact replica of the production environment which is often used as a temporary location to hold the solution before migration to production. |
| Stage testing | Testing to verify the solution in the stage environment. Additional tests may be performed here prior to migration. |
| System testing | Technical testing of the solution to see that it is delivering all the functionalities intended. |
| UAT | User Acceptance Testing. Testing to verify that the solution meets the business need. These tests are almost always executed by business users. |
| Unit testing | Same as development testing. |
| User testing | Same as UAT. |
|  | [add others as needed] |

# Feedback

If you have any questions on PM Essentials or on project management practices, please contact DIR’s PPMO at [ppmo@dir.texas.gov](mailto:ppmo@dir.texas.gov).