



<Project Name> Test Management Plan

Version X.XX

Instructions to the Author:

This is a template for developing a project Test Plan.

The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values and information specific to the project.

Blue text enclosed in boxes provide instructions to the document author, or describes the intent, assumptions, and context for the content included in this document. This instructional text should be removed from the final document to make the plan more readable.

Text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a project.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as required to support a specific project. The information and outline is a suggestion to assist in developing project documents; they are not mandatory formats. The author should tailor the content of the document to fit the project this work product will support.

Test Plan:

The purpose of the Test Plan is to outline and communicate the intent of the testing effort for a given schedule. Primarily, as with other planning documents, the main objective is to gain the acceptance and approval of the project sponsor, business lead, Project Manager, etc. in the test effort before start. A Test Plan documents the strategy that will be used to verify and ensure a product or solution meets its design specifications and other requirements. A Test Plan is usually prepared by or with significant input from test engineers.

Depending on the product and the responsibility of the organization to which the Test Plan applies, a Test Plan may include a strategy for one or more of the following:

- Unit, Design Verification, or Compliance test - to be performed during the development or approval stages of the product, typically on a small sample of units
- System, Manufacturing, or Production test - to be performed during preparation or assembly of the product in an ongoing manner for purposes of performance verification and quality control
- User Acceptance or Commissioning test - to be performed at the time of delivery or installation of the product
- Performance, Service, and Repair test - to be performed as required over the service life of the product
- Regression test - to be performed on an existing operational product, to verify that existing functionality did not get broken when other aspects of the environment are changed (e.g., upgrading the platform on which an existing application runs)

A complex system may have a high-level test plan to address the overall requirements and supporting test plans to address the design details of subsystems and components

Test Plan document formats can be as varied as the products and organizations to which they apply. There are three major elements that should be described in the Test Plan: Test Coverage, Test Methods, and Test Responsibilities. These are also used in a formal test strategy. The Test Plan document could be a vendor deliverable depending on the terms and conditions of the governing contract.

| Section | Use | Section | Use |
|------------------------------|------------|---------------------------------------|------------|
| Introduction | Required | Levels of Testing | Required |
| Purpose | Optional | Procedures | Optional |
| Scope | Optional | Coverage | Required |
| Objectives | Required | Project Iteration Closeout Activities | Required |
| Roles and Responsibilities | Required | Tools | Required |
| Team Organization | Optional | Test Management Repository | Required |
| Completeness and Correctness | Optional | Defect Log | Required |
| Testing Standards | Optional | References and Related Documents | Optional |

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Revision History

| Date | Version | Author(s) | Notes |
|----------|---------|-----------|-------|
| 1/1/2018 | 0.01 | | |
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Test Plan

Introduction

Provide a brief introduction to the concept of test planning for the intended audience of this document, i.e. the project team, project sponsor, stakeholders, and executive leadership.

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A Test Plan describes the testing scope and activities that will be completed by the Quality Assurance (QA) team to control the quality of a solution after it has been developed and before it is placed in production. It is the basis for formally testing any solution or product in a project.

Purpose

Define the purpose of this Test Plan. Provide an overview of the strategy the project team will follow to manage testing throughout the project life cycle.

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The Test Plan documents the strategies that will be used to ensure testing activities are effectively implemented within the <PROJECT NAME> Project team. The plan defines the testing scope, milestones, requirements, dependencies, risks, and procedures that support the project deliverables, team members, and contributors.

Scope

Define the boundaries of the test plan; what activities are covered in testing. For example; a summary of all work to be performed, products to be produced, and the schedule for implementation. The scope should give an overall picture of what the testing in the project entails.

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Objectives

Detail the objectives and approach the project team will take to manage testing.

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The objective of the Test Plan is to outline the project testing activities and responsibilities that will ensure a continuous end-to-end quantitative evaluation of the quality of project deliverables and processes throughout the life cycle of the project.

Roles and Responsibilities

Provide a list of personnel and their key roles and responsibilities with respect to issue management in the project.

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The <QA MANAGER OR OTHER DESIGNEE> will serve as the Test Manager for this project. The QA Manager will establish a testing team for the identification, review, monitoring, and control of project nonconformities. The testing roles and responsibilities of key members of the project are listed below.

| Name/Title | Role | Test Responsibility |
|------------|------|---------------------|
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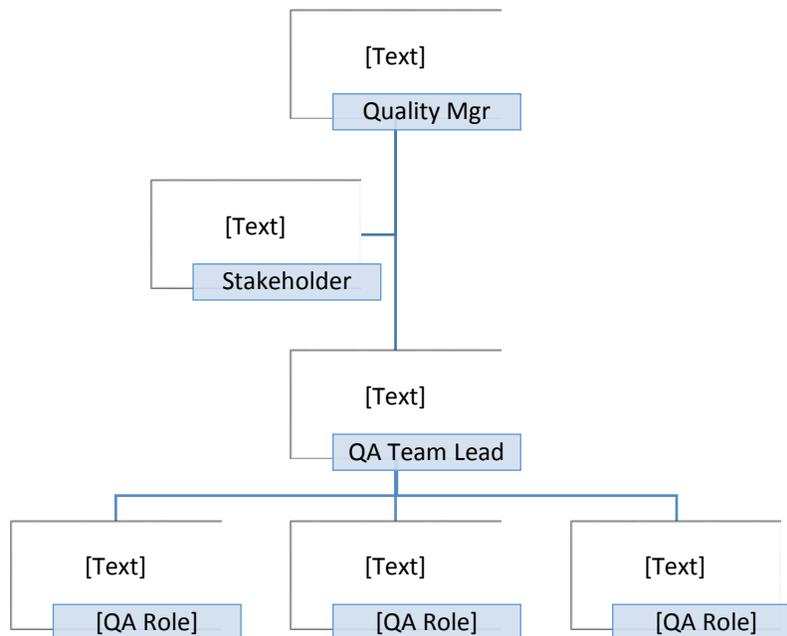
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| Name/Title | Role | Test Responsibility |
|------------|------|---------------------|
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Team Organization

Include an organization chart of the Quality Assurance team below.

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Testing Methodology

Outline the approach the test team will implement to test the deliverables of this project. List the testing standards this project will utilize.

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The testing team's primary responsibility is to ensure the features or functions of a deliverable that do not conform to the agreed requirements of design and construction are not delivered until the non-conformity or defect is remedied. The team is responsible for continually improving the effectiveness of the quality management system using quality policy, quality objectives, audit results, analysis of data, corrective and preventive actions, and management review.

Completeness and Correctness

Define the terms and conditions of what is complete and correct that all project members, suppliers, stakeholders, and end users will be required to support.

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The project team and major stakeholders will agree up front on when each major deliverable is complete and correct. The deliverables are then evaluated against these defined acceptance criteria before they are formally approved.

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The testing team will implement a quality control centric corrective action program that ensures prompt and effective reporting of non-conformities and with a recommended corrective action required to prevent the recurrence of the failure.

Testing Standards

Provide an outline of the standards that the project test team will implement to ensure good control of the quality of deliverables before acceptance.

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The test program starts with the defect repository and operates as a closed-loop system, tracking problems, driving root-cause analysis and corrective action, and measuring the effectiveness of solutions. DSS concerns or complaints are addressed through this mechanism. The testing team and development team are responsible for ensuring the corrective action program operates correctly at all levels of the project life cycle. The testing standards by which this project will be governed are

- e.g. Defect Severity Level Definitions
- e.g. Deliverable Quality Index (DQI) Calculation
- e.g. Deliverable Release Criteria
- e.g. Stakeholder/End User Evaluation Activities

Levels of Testing

Describe the different levels, on what platforms executed, and sequence (including any pre-requisites). For example; system, unit - will be performed by the development team on the DEV environment, while User Acceptance Testing (UAT) and regression testing will be executed on the TEST environment. Before version <X> can be installed in production, it must pass UAT in test.

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Procedures

List the process this project will perform including steps to take, templates to use, minimum documentation, and levels of approval expected, and location to archive results when finished. List how to document and escalate issues/defects when identified and retesting to perform.

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Coverage

Provide an overview of test coverage for the project. List the types of tests this test plan will implement to ensure coverage. Test coverage in the test plan details what requirements will be verified during what stages of the product life. Test coverage is derived from design specifications and other requirements, such as safety standards or regulatory codes, where each requirement or specification of the design ideally will have one or more corresponding means of verification. Test coverage for different product life stages may overlap, but will not necessarily be the same for all stages. For example, some requirements may be verified during design verification testing but not repeated during acceptance testing. Test coverage also feeds back into the design process, since the product may have to be designed to allow test access.

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Project Iteration Closeout Activities

List the project closeout activities the testing team will oversee at the completion of each iteration of the project and at final project closeout.

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Project closeout activities (such as lessons learned and project certification) will be tailored at project startup to fit the needs of the project. The testing team will be responsible for ensuring these activities are completed in accordance with the project management plan, and their resulting work products are recorded for future analysis and review. Examples of closeout procedures and documents include but are not limited to

- Project Shutdown Procedures
- Project Management Log
- Project Transition Plans
- Final Tollgate Reviews
- Lessons Learned
- Client Certification or Acceptance

Tools

Provide an overview of the tools the project will use and the practices the team is committed to follow to test project deliverables. At minimum, the project team should establish a repository for collocating the plan and the test artifacts that will be generated over the life cycle of the project.

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The following tools will be used by the testing team to manage the deliverable test process:

e.g. Microsoft® Word & Excel – used to develop and maintain project documents such as milestone plans, cost models, project reports, and quality audit results.

e.g. Microsoft® Project Professional – used to develop and manage the project test schedule including a detailed work breakdown structure of testing tasks, resource assignments, and timelines.

e.g. Jira – used to develop and manage client user acceptance testing.

e.g. Microsoft Team Foundation Server (TFS) – Used to develop a project test backlog of test cases that trace back to project requirements and acceptance criteria, track pass/fail results, and conduct load testing.

Test Management Repository

Detail the location (directory, system, etc.) and a high-level overview of organization structure of the Test Management Repository. If available, provide an accessible link to the repository's location.

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Defect Log

Provide an outline of what system or solution will be used to capture and track identified nonconformities (i.e. defects). Provide a list of the key information items that will be captured for each defect. Detail where the defect repository will be maintained. If available, provide an accessible link to the defect log's location.

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References and Related Documents

Provide references to any project work products this plan *is dependent on or are dependent on* this test plan. For example, the Quality Management Plan outlines how the project will manage quality in the project overall, the Project Management Plan will contain an overview of the Project Manager's vision for this test plan; the project schedule will likely include testing tasks and reports due at weekly and/or monthly intervals.

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| Reference | Project Repository Location |
|-----------------------------------|-----------------------------|
| E.g. Department PM Best Practices | PMO Process Library |
| E.g. Project Management Plan | Project Workspace |
| E.g. Quality Management Plan | Project Workspace |
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Approvals

Identify by name, title, and signature the individuals agreeing to authorize expenditure of organizational resources to accomplish the project activities outlined in this Test Plan. At a minimum, the plan should be signed by the Project Manager, the Project Sponsor, and, if applicable, the Executive Sponsor.

Remove this instruction text from the final document.

| Role | Name & Title | Signature | Date |
|------|--------------|-----------|------|
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