



Client Case Study

Joint UAT within a Test Centre

Introduction

Test Centres can play a very visible and efficient role within an organisation. When managed correctly they can balance off varying demands and sudden changes of plan. They provide a focal point for testing and a career path for aspiring professionals. A test centre will better retain skills and knowledge for future projects.

Joint User Acceptance Testing (JUAT) is a key activity in the development lifecycle. Ideally, its criteria is defined early on in a project but execution won't take place until near implementation. Close working between client and supplier is essential in ensuring that there are no surprises late on in a project. What happens then when JUAT criteria hasn't been actively agreed up front and the Client believes that JUAT is the responsibility of the Supplier?

This case study describes how SQA tackled a project where testing did not have appropriate visibility within the organisations and JUAT was not even a consideration.

The Client and Supplier in this case study are two major bank participants in the Fund Accounting and Fund Administration vertical market. The Client had a set of requirements for reporting to the local regulatory authorities. The Supplier viewed these requirements as straightforward data extracts and the Client, which had been producing these reports for many years, took a similar view. Analysis had been carried out which had specified each extract/report and mapped the data elements from the Supplier's system to the output format. Testing was expected to have a duration of a few weeks with implementation taking place shortly afterwards.

If you would like to discuss this case study please email kenny.laing@sqa-consulting.com

How SQA assisted

Two SQA consultants were assigned to perform an initial survey of the project testing state. One consultant was an SME in Fund Accounting and the other was an SME in Testing. At SQA Consulting we consider it important that we always deploy resources that have a proven track record. Our consultants discovered that the reality was quite different to both the perceptions of the Client and Supplier. A complicating factor was that on the face of it the Client and Supplier had aligned misperceptions so there was no reason for them to question each other.

Our consultants discovered that the regulatory nature of the Client's reporting meant that accuracy was critical. Existing automated extracts were found to be only an initial input into a manually intensive process of checks and edits that eventually resulted in an acceptable set of output reports. The Supplier equivalent automated extracts revealed a whole stack of gaps in the creation of the underlying data. Furthermore, there was no provision for manual checks and no ability to perform high risk data edits. At an operational level the Client assumed that the Supplier would ensure data quality and perform all testing while the Supplier assumed there would be no data quality issues and that testing would be a formality.

We set up a testing framework and governance across the whole project. This ensured that IT deliverables were clearly bound into the test plan and any slippage fully attributable. The Supplier already had an ALM (formerly Quality Center) site licence so we leveraged this and showed how to use it to its full potential. All requirements were identified and input: in only a few days the Test Centre had been established.

Our Fund Accounting SME worked directly with Client and Supplier to close the open gaps, document changes to IT and then handover to the test team and operational support. SQA were able to supply a skilled on demand test team hence allowing the Supplier to better control their costs.

The focus that the Test Centre brought was a key factor in turning this project around. The final deliveries were made on time to the satisfaction of both Client and Supplier.