**UAT Test Plan Template**

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**1. Document Overview**

**Project Name:**

**System Under Test:**

**Version:**

**Prepared by:**

**Date:**

**Purpose:**

This UAT Test Plan outlines the strategy, scope, roles, timeline, and criteria for conducting User Acceptance Testing for the [System Name or ERP Name] project.

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**2. Objectives of UAT**

- Validate that the system meets business requirements and processes.

- Confirm that end users can perform their day-to-day tasks successfully.

- Identify any gaps, usability issues, or showstopper defects before go-live.

- Provide formal business sign-off before deployment.

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**3. Scope of Testing**

**In Scope:**

- Key end-to-end business processes (e.g., Procure-to-Pay, Hire-to-Retire)

- Role-based workflows and security

- Reports, dashboards, and outputs

- Key integrations and interfaces (e.g., payroll, CRM, bank feeds)

**Out of Scope:**

- Low-level technical or unit testing

- System performance or load testing

- Non-critical modules not included in this release

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## 4. UAT Entry Criteria

- System development/configuration is complete

- All defects from prior test phases are resolved or deferred

- Environments and test data are prepared

- Test cases/scripts are documented and reviewed

- UAT participants are trained

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## 5. UAT Exit Criteria

- All high-priority UAT scenarios are executed

- All critical/blocking defects are resolved

- Sign-off obtained from key business stakeholders

- No outstanding risks that block go-live

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## 6. Roles & Responsibilities

**UAT Lead / Test Manager:**

- Oversees planning, execution, defect triage, and reporting

**Business Process Owners / End Users:**

- Execute test cases and provide feedback

- Sign off on functional acceptance

**IT/Support Team:**

- Set up UAT environments

- Assist with defect resolution and test data issues

**QA/Testing Team (if involved):**

- Assist with tracking, reporting, and documentation

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### 7. Test Environment

- Define where UAT will be conducted (e.g., dedicated UAT environment)

- Detail access credentials, URLs, and any constraints

- Specify tools used for test execution or defect logging (e.g., JIRA, spreadsheets)

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### 8. Test Data

- Source: [Production copy / anonymised data / synthetic data]

- Key data types required: customers, suppliers, employees, products, transactions

- Refresh/reset frequency and method

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### 9. Test Scenarios

List or link to UAT scenarios and scripts, such as:

- Purchase order creation & approval

- Employee onboarding & payroll setup

- Customer invoice generation

- GL account postings and financial reports

Include process IDs or scenario names from the ERP if applicable.

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## 10. Defect Management

- Defect logging tool: [e.g., JIRA, ServiceNow, Excel]

- Defect priority categories (e.g., Critical, Major, Minor)

- Process for triage, re-testing, and closure

- Daily defect review process (if applicable)

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## 11. Test Schedule & Timeline

- Start and end dates for UAT

- Milestones: scenario walkthroughs, mid-cycle review, final sign-off

- Planned contingency buffer

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## 12. Risks & Mitigations

| Risk | Impact | Mitigation |
|------|--------|------------|

| Limited tester availability | Delays | Block out calendar time early |
|---|---|---|
| Incomplete test data | Test failure | Use synthetic or seeded data where needed |
| Change requests mid-UAT | Scope creep | Require change approval process |

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## 13. Sign-off Process

- Who signs off (by role or name)

- What is being signed off (scope, defects, readiness)

- How sign-off will be documented (email, form, digital tool)