



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
600 Washington Street • Boston, MA 02111


DEVAL L. PATRICK
Governor

JUDYANN BIGBY, M.D.
Secretary

TIMOTHY P. MURRAY
Lieutenant Governor

JULIA E. KEHOE
Commissioner

Field Operations Memo 2010-11A
February 17, 2010

To: Transitional Assistance Office Staff
From:  John Augeri, Assistant Commissioner for Field Operations
Re: BEACON 3.0 User Acceptance Testing (UAT)

Overview

BEACON 3.0 User Acceptance Testing (UAT) is designed to test the typical transactions encountered by DTA field and Central Office users, as well as external agencies that interface with BEACON on a daily basis.

Testing is being conducted at TAOs and Central Office by staff who have volunteered and been trained to test the new system. Effective January 16, 2010, BEACON 2.0 data was converted into the BEACON 2.0 Training application. Therefore BEACON 2.0 Training will contain information only as current as January 16, 2010.

Phase 1 of UAT began on January 19, 2010, and Phase 2 began on February 1, 2010.

Purpose

The purpose of this memo is to describe the preparation for and outline the procedures to be followed in the process for BEACON 3.0 UAT. To that end a process has been developed and a number of tools have been created to monitor the testing and communicate any issues that require resolution. To prepare for UAT, over 500 test scenarios have been developed. A *UAT Test Scenario Inventory* document and a *Caseload Profile* document have been created for each UAT tester with a caseload. These documents have been uploaded to the R: Drive for each TAO participating in the testing process.

Purpose
(continued)

Each *UAT Test Scenario Inventory* document has been identified with the first and last name of the UAT tester. The *Caseload Profile* document has been identified with the UAT tester's last name only. Managers and BEACON 3.0 UAT Liaisons from each TAO testing site will have access to the R: Drive. The roles of managers and UAT Liaisons are described later in the memo.

UAT Tester Tools UAT testers have been provided the following tools:

Training

- Training in the BEACON 3.0 application;
- Training in the BEACON 3.0 UAT process, including how to create a Microsoft Word document and how to enter information into the ClearQuest software application.

Applications

- a BEACON 2.0 Training application with converted data as of January 16, 2010, which will run a *partial* set of eligibility and notice batch jobs each night to update some of the data;
- a BEACON 3.0 UAT application with converted data as of January 16, 2010, which will run a full set of batch jobs each night to update the data;
- an IT industry standard software tracking system called ClearQuest, which is used to track issues reported by testers during BEACON 3.0 UAT;
- Microsoft Excel to view the *UAT Test Scenario Inventory* document;
- Microsoft Word to create an attachment that will be attached to the UAT testers' ClearQuest issues.

Documentation

- a password to access BEACON 3.0 UAT;
- a password to access ClearQuest;
- a *UAT Test Scenario Inventory* document, which is a list of specific case scenarios that require testing; and will also be used to record the results of each test;
- a *Caseload Profile* document which identifies cases assigned to each tester and lists key criteria about each case. This will assist in the identification process of matching particular cases to individual scenarios.

Note: UAT testers who do not have a caseload will not be provided with a *Caseload Profile* document.

- Responsibilities:** The BEACON 3.0 UAT Liaison is the TAO or Central Office unit lead for the testing process, and is responsible to:
- BEACON 3.0 UAT Liaison**
- assign BEACON 3.0 UAT passwords;
 - access the *UAT Test Scenario Inventory* and *Caseload Profile* documents through the R: Drive on his/her desktop;
 - save both documents in the G: Drive for each tester;
 - create folders for each tester in the G: Drive and name them *B3UATtestersname*. These folders will be used to store Microsoft Word documents for ClearQuest issues;
 - monitor UAT completion rates;
 - assist the UAT tester with any UAT activities, as appropriate;
 - call the Systems Help Desk when a system is unavailable, or there is a BEACON 3.0 UAT or ClearQuest password issue;
 - work with the UAT tester to verify and document any failed scenarios using ClearQuest;
 - monitor ClearQuest Queries and tester response to ClearQuest Queries at least once per day. For detailed information related to creating ClearQuest Queries, access the *BEACON 3.0 User Acceptance Testing (UAT) Training Job Aids* located in the Job Aids folder in Policy Online;
 - at the end of each day, compile and save the *UAT Test Scenario Inventory* document from the G: Drive to the R: Drive into the BEACON 3.0 UAT office folder.

Note: Those TAO Managers that have received training are expected to take on the role and responsibilities of the BEACON 3.0 UAT Liaison, if the UAT Liaison is absent or unavailable.

- Responsibilities:** Each day, the UAT testers will access their documents on the G: Drive and then select SSN's from their *Caseload Profile* to match the criteria for the test scenarios identified in the *UAT Test Scenario Inventory* document for testing. Each scenario will be entered in BEACON 3.0 UAT.
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Responsibilities: For case maintenance scenarios, enter the data into BEACON 2.0 Training and compare the results.
UAT Tester
(continued)

Note: When comparing results, remember that cases that have been processed by BEACON batches after January 16th may have different results based upon the differences in the batch cycles.

For “new functionality to BEACON 3.0” scenarios, use BEACON 3.0 UAT alone.

For new RFA scenarios, find cases that were recently approved in BEACON 2.0 Training that meet the criteria on the *UAT Test Scenario Inventory* document. The *New* column listed on the *Caseload Profile* identifies cases that have recently applied for benefits for the first time. This column was included to assist in the identification of new cases that were opened at some point in the past through RFA and have remained active. If the *New* column is blank, the case has been closed and reopened in the past. This should assist in the identification of cases to reopen.

Once a case is selected for a new application from the *Caseload Profile* document, print the Application/Reevaluation Data Sheet in BEACON 2.0 Training. Enter a new RFA in BEACON 3.0 UAT using the data from the data sheet with the exception of the name(s) and SSN(s). When changing the SSN of the Grantee, be sure to use the same last digit of the Grantee’s SSN. If the same data from the existing BEACON 2.0 Training case is entered into BEACON 3.0 UAT, the expected results should be the same.

After entering each scenario, compare the results to determine whether the scenario is a *pass* or *fail*. A description of what constitutes a *pass* or *fail* can be found later in this memo. If the results of the test *fail*, review the scenario with the BEACON 3.0 UAT Liaison to ensure that information was correctly entered on the pages. If the BEACON 3.0 UAT Liaison agrees that the scenario is a *fail*, the tester must access ClearQuest.

When testing a scenario, the UAT tester must:

- open the *UAT Test Scenario Inventory* document and select a test script;
- open the *Caseload Profile* document and select a case based upon the test script criteria;

Note: UAT testers without caseloads will not have a *Caseload Profile*.

Responsibilities:
UAT Tester
(continued)

- enter the SSN of the case chosen from the *Caseload Profile* document into the *UAT Test Scenario Inventory* document;
 - open BEACON 2.0 Training (use “TAO Office Explorer” and refresh as yourself if necessary);
 - open BEACON 3.0 UAT;
 - enter the scenario into BEACON 2.0 Training, and BEACON 3.0 UAT, as appropriate;
 - if no issue occurs while entering the scenario information into BEACON 2.0 Training or BEACON 3.0 UAT record “Pass” on the *UAT Test Scenario Inventory* document;
 - if an issue occurs while entering the scenario information into BEACON 2.0 Training or BEACON 3.0 UAT the tester must document the issue;
 - review the scenario that produced an issue with the BEACON 3.0 UAT Liaison to ensure that information was entered correctly on the pages;
 - open a new document in Microsoft Word;
 - capture any screen prints in Microsoft Word from BEACON 2.0 Training and BEACON 3.0 UAT, as appropriate;
 - describe the issue, documenting the pertinent steps that created the issue in a Microsoft Word document;
 - open ClearQuest to create a new issue; a 5-digit defect number will appear on the ClearQuest screen when recording a fail on the *UAT Test Scenario Inventory* document;
 - save the Microsoft Word document to the G: Drive following the specific instructions later in the memo;
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Responsibilities:
UAT Tester
(continued)

- attach the Microsoft Word document to ClearQuest, complete and save the ClearQuest issue. For detailed information related to creating ClearQuest issues or attaching documents, access the *BEACON 3.0 User Acceptance Testing (UAT) Training Job Aids* located in the Job Aids folder in Policy Online;
- annotate the scenario in the *UAT Test Scenario Inventory* document with “Fail” and the ClearQuest defect number;
- monitor ClearQuest daily and respond to any outstanding requests for information or verify issue resolution.

Important: At least once per day, the UAT tester **must** check the DTA/Public Queries/My UAT Details/ Needs More Info query in ClearQuest daily, to respond to issues that are being returned to the tester to supply additional information.

Additionally, each UAT tester **must** check the DTA/Public Queries/My UAT Details/ My Resolved Items at least once per day to verify issues that have been resolved. For detailed information related to reconciling ClearQuest responses, access the *BEACON 3.0 User Acceptance Testing (UAT) Training Job Aids* located in the Job Aids folder in Policy Online.

When the UAT tester completes testing for the day, the following information must be transmitted to the BEACON 3.0 UAT Liaison via the *UAT Test Scenario Inventory* document:

- the scenarios tested;
- the date of the test; and
- the disposition of the scenarios tested by indicating either *pass* or *fail*; and,
- for *failed* scenarios, the ClearQuest defect number(s).

Responsibilities:
**UAT
Management
Team**

A cross-functional management team stationed in Central Office is responsible to:

- review ClearQuest issues and triage them to the appropriate unit for resolution or send back to the UAT tester, if an issue needs more information;
 - review the UAT Test Scenario Inventories daily to track the number of scenarios being tested;
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**Responsibilities:
UAT
Management
Team
(continued)**

- record results and follow up, as necessary;
 - conduct daily conference calls with all UAT test teams and TAO managers;
 - Issue *BEACON 3.0 UPDATES* to UAT testers to communicate process clarifications; and,
 - provide a BEACON UAT Help Line.
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**Creating a
Microsoft Word
Document**

Each UAT tester must create a Microsoft Word document if testing results in a *fail*. The UAT tester must enter all appropriate information on this Microsoft Word document. In addition, UAT testers will be required to access the ClearQuest application to obtain an issue/defect number. This number is unique and will be assigned to each issue identified within a failed scenario.

The tester must:

- open a blank Microsoft Word document;
 - go to the BEACON 3.0 Home Page; click on the word “Copyright” beneath the Recent Clients Icon; highlight the copyright information; copy and paste the information above the screen prints on the Microsoft Word document;
 - annotate the Script Number and Scenario Description from the *UAT Test Scenario Inventory* document the SSN of the failed scenario and a detailed description of the issue. The description should be as detailed as possible describing what was done that resulted in the failed scenario;
 - press the **Alt** and **Print Screen** button on the keyboard simultaneously to copy the BEACON 3.0 and/or BEACON 2.0 page where the issue occurred;
 - press the **Ctrl** and the **V** key on the keyboard simultaneously to paste the screen print into the Microsoft Word document. To fully illustrate the issue, more than one screen print can be pasted to the Microsoft Word document if necessary; **Do not overlap screen shots**; and,
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**Creating a
Microsoft Word
Document
(continued)**

- save the Microsoft Word document to the G: Drive in the *B3UATTestersname* folder.
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**Saving a
Microsoft Word
Document**

To save the Microsoft Word document to the G: Drive:

- click File;
- click Save As;
- select the G: Drive from the box displayed;
- find the B3UAT folder with tester's name;
- click on the *B3UATtestersname* folder to open;
- name the document; and,
- click Save.

For detailed information related to attaching documents in ClearQuest, access the *BEACON 3.0 User Acceptance Testing (UAT) Training Job Aids* located in the Job Aids folder in Policy Online.

**Pass/Fail
Criteria**

To determine a *pass* or *fail* for each scenario, the UAT testers will use all or some of the criteria listed below. The *UAT Test Scenario Inventory* document identifies the criteria which apply to each scenario in the column named *Pass/Fail*.

The following criteria are used to determine a *pass* or *fail* for each “eligibility-related” scenario.

Day 1

1. Is all information entered on all appropriate pages?
 2. Is there a verification list created on the Verification tab?
 3. Verify ability to print a Verification Checklist (VC-1).
 4. Check Document History for all Request For Assistance (RFA), Applications, Re-evaluations and VC-1's.
 5. Interview Wrap-Up requires re-edit.
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**Pass/Fail
Criteria
(continued)**

6. Wrap-Up
 - a) Selection EBC Results
 - b) Authorization
 - c) Did case appear on supervisor's Pending Authorization view?
 - d) Did case appear on case manager's "Pending Release" view?

Day 2

7. Did transaction(s) release at the proper time?
8. Was notice generated?
9. Check all appropriate Electronic Case Folder (ECF) tabs on BEACON 3.0 UAT.
10. All BEACON 2.0 Training and BEACON 3.0 UAT eligibility related transactions have same results.

Non-eligibility Scenarios

11. If action is successful for non ECF functionality, then it is a *Pass* and testers should follow the steps described in *Responsibilities: UAT Tester* above.

If any of these steps result is a *fail*, the test is considered a *fail*. If the UAT tester has already discussed the *fail* with the BEACON 3.0 UAT Liaison, then the UAT tester must report this as a failed scenario on ClearQuest. For ClearQuest instructions, please reference the *BEACON 3.0 User Acceptance Testing (UAT) Training Job Aids* located in the Job Aids folder in Policy Online.

Obsolete Memo

This Field Operations Memo obsoletes Field Operations Memo 2010-11.

Questions

If you have any questions, please have your BEACON 3.0 Liaison call the BEACON UAT Help Line at 617-348-5661.
