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**Document Approval:**

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| **Personnel / User** | **Role** | **Date (DD-MMM-YYYY)** | **Signature** |
| <Full Name> (<Username / Employee ID>) | <Role of signing user> | <Date of signature in format DD-MMM-YYYY> | <Signature> |
| John Doe / (jdoe1) | Quality Assurance | 01-Jan-2015 | John Doe |
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Instructions

The purpose of this template is to assist with the creation and application of system development deliverables according to the Software Development Life Cycle (SDLC) practice. The sections in blue font provide instructions, and should be removed. Upon use of this template, consideration should be taken for the departmental and site-level procedures that govern the deliverables of the system. Please see below for instructions regarding this template:

* **Blue-colored text** provides instructions for the author to better understand the template and its use. All blue-colored text should be removed from this document upon completion.
* Black-colored text provides sample wording that can be used, removed, or altered as necessary. Different sections may be added, altered, or removed as necessary as well. The document may be modified to fit its intended use.
* Red-colored text provides sample information that for a more complete understanding of the intended use of various portions of the document. This text must be removed from the document upon completion.
* Highlighted text should be replaced by the author with the correct information.

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# Purpose

The purpose of this Configuration and Installation Test Procedure (CITP) is to describe, plan, and document the installation activities pertaining to the installation and configuration of <System/Module/Interface/Other Name>. This document will lay out the installation activities to be performed for any and all system software/hardware, peripherals, and network components, according to the Configuration Specifications and Design Specifications documents. The information in the following sections accounts for the specifications of the supplier/manufacturer.

All documents necessary for the operation of <System Name> will be verified as part of this document and its subsequent report.

# Scope

The scope of this CITP and its associated report is to track and verify the configuration steps and acceptance level required for <Describe the scope of this testing and the installation/configuration to which it pertains. Make sure to reference the system and System ID or Configuration Item ID to which this installation/configuration belongs to.

This section should also generally describe the test procedures that are associated with this document to ensure the correct functionality of the system.>

## Prerequisites for Execution

Describe the prerequisites for the execution of this CITP. This may include the approval of certain documents.

# <System/Interface/Module/Other Name> Overview

Include this section to describe any system, interface, managed system, module, peripheral, etc. that is associated with this installation/configuration testing. Provide information about external components and how they will interact with the main system.

# Roles and Responsibilities

Describe the approval roles and responsibilities that are required for this CITP. This should describe the necessary signatures that are required as approvals for the report that is generated with this document. This section should indicate who is to be the Author of the report, who is to review the report, and who shall approve the report.

The following approvals are required for this document as part of the testing procedures.

| **Purpose** | **System Role** | **Notes** |
| --- | --- | --- |
| Author | IT SME | The process steps are performed and documented by the IT SME for the CITP |
| Review | Validation Coordinator | The Validation Coordinator for <System Name> reviews the documentation of the CITP to ensure its completeness and correctness |
| Review and Approval | QA | A QA representative verifies the correctness and completeness of the CITP and its any associated documentation |
| Approval | System Owner | The System Owner provides final approval |

If any other roles are necessary for the use/interaction between any interfaces/modules/managed systems, describe them in this section as well.

# Technical Architecture Overview

This document takes into consideration the applicable content of the <System Name> Design Specifications (DS) document. The table below provides information regarding the exact version of the DS for this system.

|  |  |
| --- | --- |
| **Title** | <Title of DS document for this system> |
| **Document Number** | <Document number of the DS document for this system> |
| **Version Number** | <Version number of the DS document for this system> |
| **Release Date** | <Release Date of the DS document for this system> |

# Test Preparation

Use this section and the following subsections to list and describe the test cases that are part of this CITP. Also, describe any prerequisites to execution of these test cases (i.e. approvals for this document).

## Scope of Testing

Describe the scope of testing that is necessary for execution. List all test cases associated with the system, and indicate which are necessary for the scope of this CITP. For test cases that are not part of the execution, state the reason for their omission.

Find below a list of the necessary test cases to be completed as part of this document. These test cases are added as attachments to this document.

| **Test Case Name** | **Test Case ID** | **In Scope?** | **Reason for Omission** |
| --- | --- | --- | --- |
| <Test Case Name> | <Test Case ID> | <Yes or No> | <Indicate the reason for omission of the test case from the test scope, if applicable. Otherwise, use “N/A”> |
| Sample Test Case | TC-0010 | Yes | N/A |
| Optional Test Case | TC-0020 | No | This test case is skipped since it is optional and does not test any features that pertain to the scope of this configuration. |
| Sample Test Case 2 | TC-0030 | Yes | N/A |
| Sample Test Case 3 | TC-0040 | Yes | N/A |

## Discrepancy Handling

Use this section to describe the process for tracking and recording test discrepancies that occur during testing. This section should reference an SOP for test discrepancy management. If necessary, test defects may be tracked in a discrepancy log, which should be added as an attachment to this document.

Test discrepancies that have been observed during testing shall be tracked, monitored, and recorded according to <SOP for Test Discrepancy Management>. Per this SOP, test discrepancies are documented in a discrepancy log, which is attached to this document (<Attachment Name, Attachment Number>).

# Test Execution

Use this section to document the test execution and subsequent results.

This section contains the execution and result information for the testing activities covered by this CITP. The end of this must contain a signature by the Validation Coordinator to indicate that the test execution documentation has been reviewed.

|  |  |  |
| --- | --- | --- |
| **Test Case ID** | **Test Result** | **Comments (Mandatory if Fail or Pass with Discrepancies)** |
| <Test Case ID> | <Skip, Pass, Fail, or Pass with Discrepancies> | <Comments> |
| TC-0010 | Pass | N/A |
| TC-0020 | Skip | N/A |
| TC-0030 | Pass with Discrepancies | Error message appeared upon logout of the user, but the system functions properly with no issues. This discrepancy is documented in the discrepancy log attached to this document. |
| TC-0040 | Fail | User could not log in to the system. Unable to complete the test case. |

In the table above, list all test cases as were listed in the table in section 6.1 (Scope of Testing). The “Test Result” column should indicate the result of the test execution (e.g. Pass, Fail, Pass with Discrepancies, Skip, etc.). For ease of use, this may be formatted into a dropdown selection field.

| **Review of Test Execution (To be completed by Validation Coordinator)** | | | | |
| --- | --- | --- | --- | --- |
| Pass | Fail | Comments: Provide a summary of the evaluation of the test results | | |
| **Personnel / User** | | **Role** | **Date (DD-MMM-YYYY)** | **Signature** |
| <Full Name> (<Username / Employee ID>) | | Validation Coordinator | <Date of signature in format DD-MMM-YYYY> | <Signature> |

# Conclusion of Test Results

Use this section to summarize the test results. This section should make note of the overall success of the testing, any discrepancies (and whether or not they caused testing to fail), rationale for test discrepancy acceptance (if applicable), and explanation of the overall success or failure of the testing.

Upon completion of the testing activities for <Name of System/Interface/Module/Other>, the testing activities were assessed and the following conclusion has been made:

| **Conclusion** | **Explanation** |
| --- | --- |
| Success with no unsolved discrepancies | It is found that all testing procedures of this CITP has been completed successfully, and the signatures on this document verify that the testing procedures have been performed as expected. In this case, either no test discrepancies have occurred, or they were solved successfully. |
| Success with accepted discrepancies | It is found that all vital testing procedures of this CITP has been completed successfully, and the signatures on this document verify that the testing procedures have been performed as expected. In this case, test discrepancies have occurred, but they are indicated to be accepted as unsolved. Overall, the test execution has been evaluated to be successful.  **Explain the rationale for the acceptance of test discrepancies:**  <Explain the explanation for this acceptance> |
| Failure with unaccepted discrepancies | It is found that the testing procedures of this CITP have been deemed to be unsuccessful. Unsolved test discrepancies and/or test failures have caused this testing to be unacceptable, and a new CITP is required.  **Enter additional information, as necessary:**  <Additional information> |

# Abbreviations, Acronyms, and Definitions

| **Term** | **Meaning** |
| --- | --- |
| <Abbreviation, acronym, word, or phrase> | <Definitions> |
| CITP | Configuration and Installation Test Procedure |
| DS | Design Specifications |
| SME | Subject Matter Expert |

# References

Provide any necessary references to other documents that are made within the document.

| **Document Title** | **Document ID** | **Document Version** |
| --- | --- | --- |
| <Document Title> | <Document ID> | <Reference Document Version Number> |
|  |  |  |

## Attachments

1 – <Name of Test Case 1>

2 – <Name of Test Case 2>

3 – <Name of Test Case 3>

4 – <Name of Test Case 4>

5 – <Name of Test Case 5>

6 – <Name of Test Case 6>

7 – Discrepancy Log

# Revision History

Provide the document history in this section, with information about the version changes including the author, date of approval, and description of changes.

| **Version** | **Author** | **Date (DD-MMM-YYYY)** | **Changes** |
| --- | --- | --- | --- |
| 1.0 | <Author Name> | 02-JAN-2015 | Initial release of the document. |