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Fluidic Enterprise

Crafting Effective User Stories for UAT

UAT Training

FL [DIGITAL SERVICE]

FloridaPALM

Nagarro, Dec. 5, 2024

Agenda

1. Background
   UAT and User Stories

2. Practical - Who, What, Why

3. Practical - Verify!

Who we are

Manu Saraswat

Client Partner

Yisrael Lowenstein

Solution Architect

Yehudah Susson

Product Development

Lilly

Resident Beagle

We are excited to be here!

team-sunshine@nagarro.com

Training Objectives

Understanding UAT and why it matters

Understanding what UAT is and why you need to be actively involved in UAT in the coming year

Understand User Stories

Understanding what are User Stories and feeling comfortable writing them

Get others involved

Be able to explain the process to others in your department - and get them to do it as well

Hands on Experience

Practice writing different User Stories

Our Journey Today

Background → Concept → Practice

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Getting to know you

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Dog Person or Cat Person?

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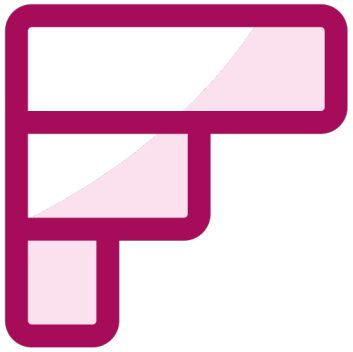

Why are you here today (select all that apply - ordered by priority)?

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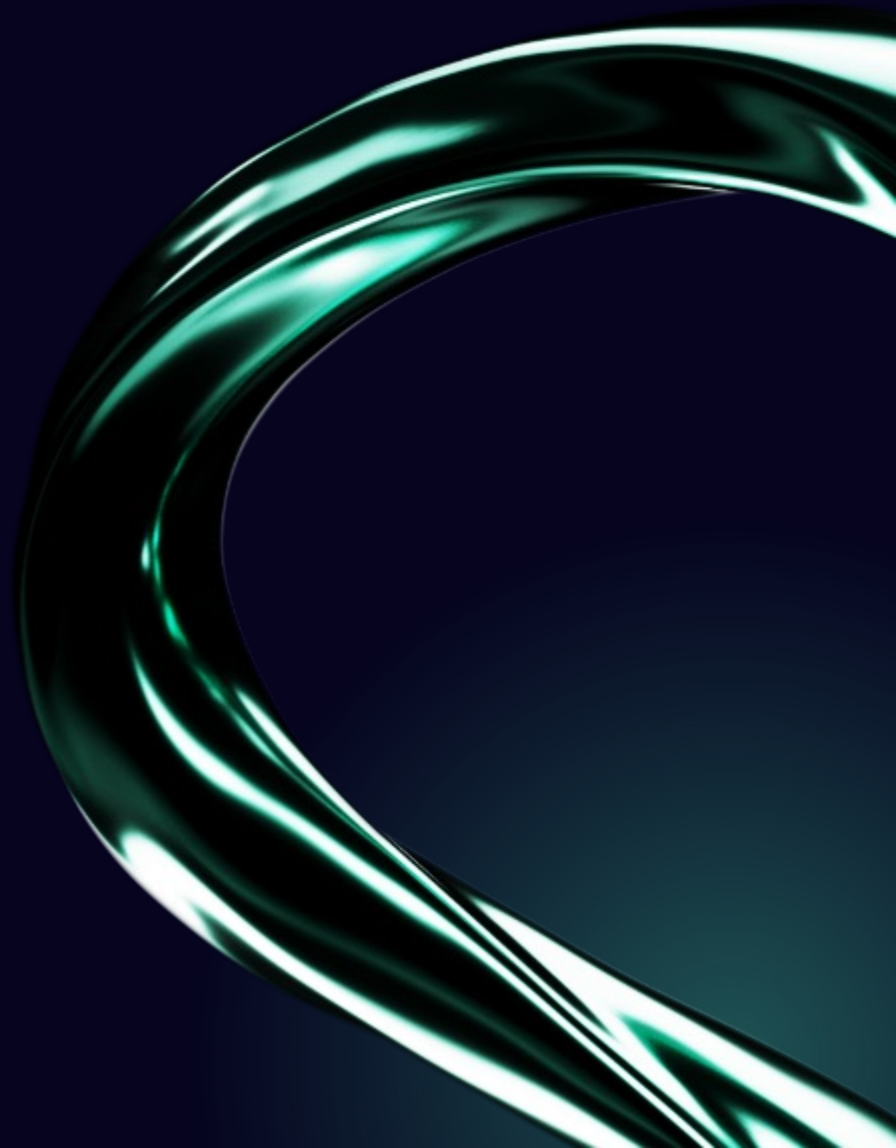
Background
UAT and User Stories

Part 1



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How confident do you feel now in being able to create actionable, testable User Stories?

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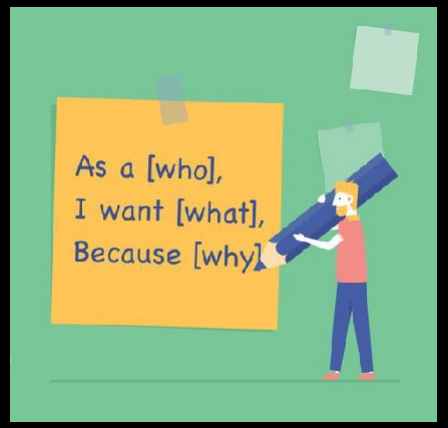
Why we are here?

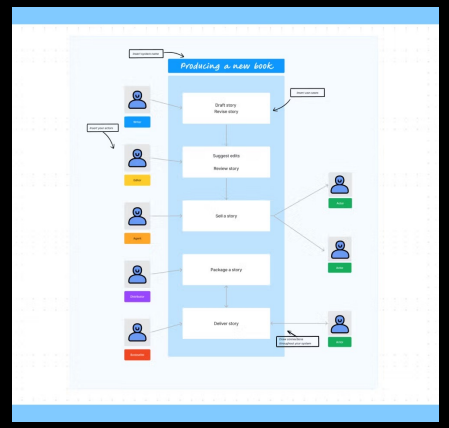
Some Terms

1. User Story



- Describes a user, the feature they need to use, and how it helps them achieve their goal

2. Test Cases



- A set of executable instructions for achieving a goal
- How to actually test functionality
- Becomes part of a test plan to use later

3. User Acceptance Testing (UAT)

- Testing to validate that the system works for end-users

Example

1. User Story

- **As a** Florida Homeowner
- **I need** to be able to quickly reach animal control
- **So that** I can get the alligator out of my pool

2. Test Cases

- Pick up the phone
- Call animal control
- Select the option to speak with an operator
- Report the existence of an alligator in your pool
- Wait for Animal Control to arrive at your house
- Confirm they have removed the Alligator from your pool

3. User Acceptance Testing (UAT)

- Testing to validate the system works for end users
- After calling animal control, has the alligator been removed from the pool?

Why are User Stories and UAT important?

- Things can be built “as defined” - but still be “broken”
- Gathering ALL the User Stories from ALL the users allows you to know what to test
- UAT finds the problems before they go to production

France pays $20 billion for trains that don't fit its stations / 1,860 new trains too wide for 1,300 regional stations

By Rich McCormick
Source BBC News

May 22, 2014, 3:22 AM EDT

0 Comments (0 New)

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How much do you know about User Stories?

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What is a User Story?

“A short, simple description of a feature told from the perspective of the User”

AS A [user]

I WANT/NEED [result]

SO THAT [reason]

Collaborative conversation

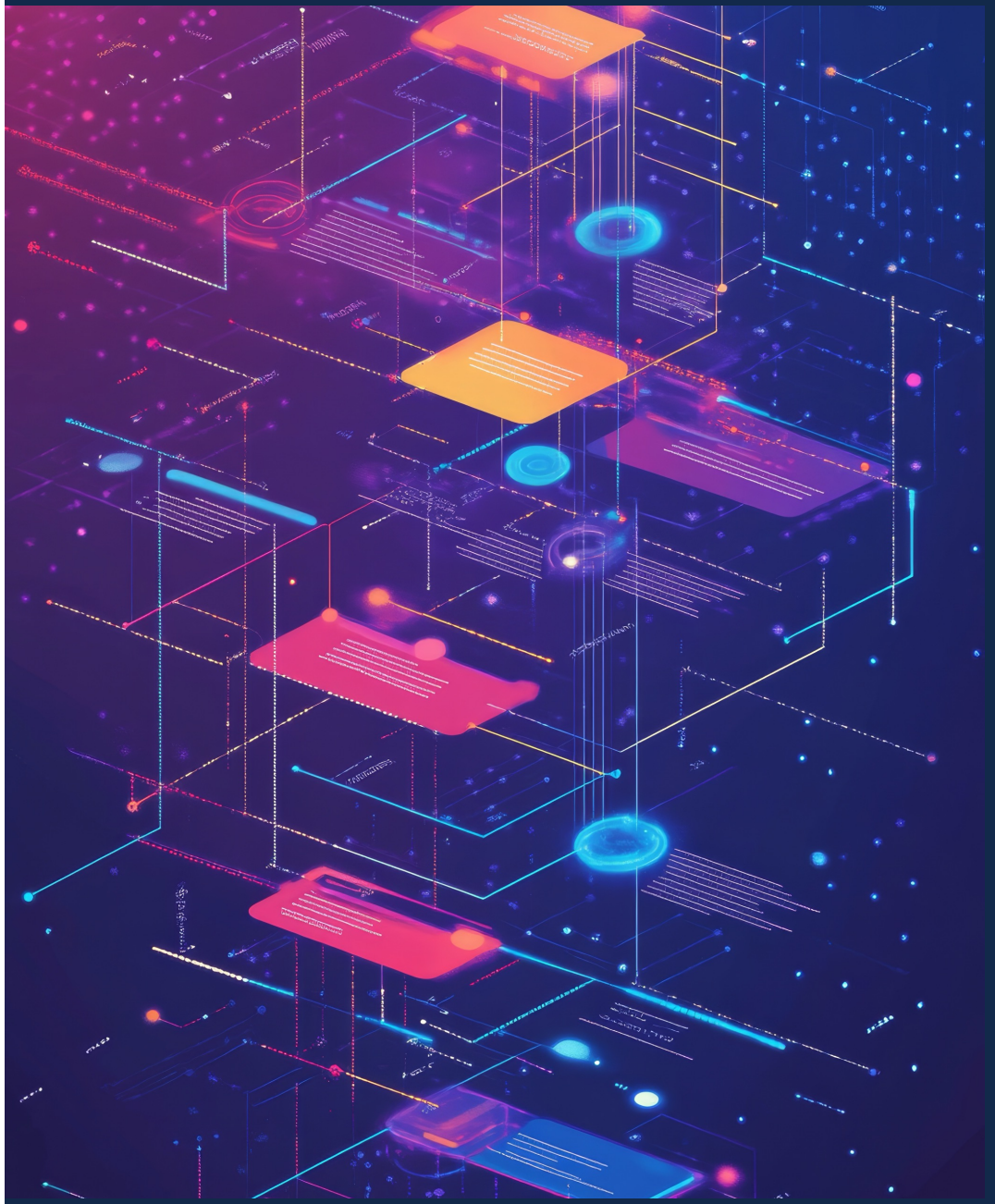
- User Stories help different people understand the Who, What, & Why
- User Stories are shared – everyone can access and discuss
- User Stories are alive – they get improved and updated over time

Who writes user stories?

- Everyone who uses the system
  - Aim to cover all the use cases
  - Just documenting what you do every day
  - Short - so anyone can do it
  - Written together

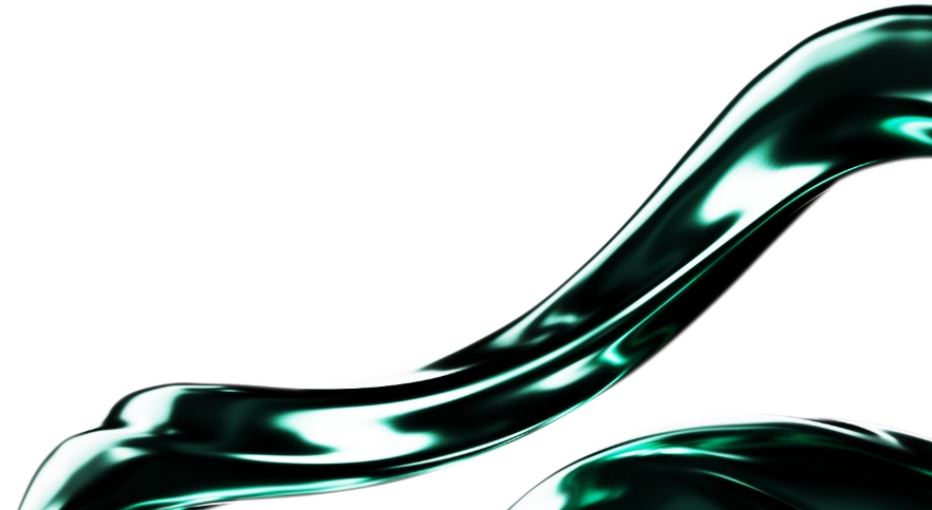
How many user stories?

- Document the most important scenarios that will need testing
- Coverage – Ideally, we need to cover all cases where users interact with the system (starting with the most important)



It’s a process…

- Don’t be scared to start - your User Stories will evolve over time
- It is more important to get started writing than to get it 100% right - they are meant to be updated and changed
- Writing User Stories should become a habit - part of good project hygiene
- You and your team should continue improving them after the User Stories have been written



User Stories for UAT

- In AGILE development User Stories are written BEFORE DEVELOPMENT to help prioritize what should be built and when
- In our case we are writing them for TESTING - to identify all parts of the system and confirm that they are interacting as expected
- We are going to focus on the parts of User Stories you need for testing (and skip the parts for estimating, etc.)

User Stories become Test Cases

- User stories describes what the user wants
- Test cases describe the practical steps that are executed when testing the system.
- Test cases are built based on the validation steps in User Stories
- …but Test Cases are not the focus for this session…

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Have you participated in a UAT process before?

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What is UAT?

User Acceptance Testing

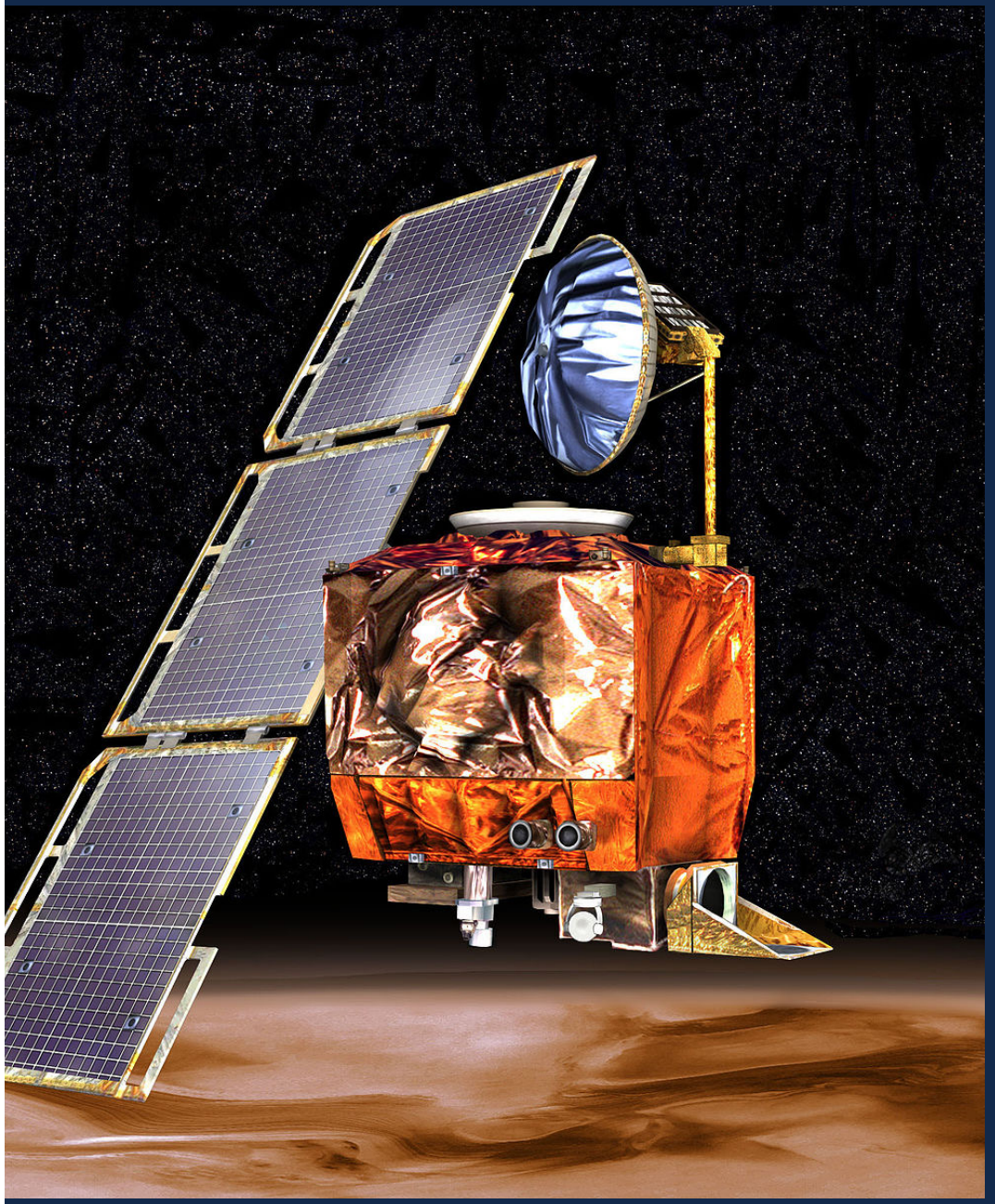
- Need to understand:
  - USER – know the user
  - ACCEPTANCE – what does success look like
  - TESTING – Actually running tests and seeing the results
- The final check by actual users to confirm that the software (and business processes) are ready for real-world use

Steps in UAT

- Identify stakeholders – Who will be involved in defining the Test Cases and testing it
- Gather knowledge & understand the problem space
- Prepare test cases – Make the actual steps to do
- Run User Acceptance Tests – Do the testing
- Evaluate and report – Did it pass? Were the users happy?

Why is UAT Necessary?

- 1999 - Mars Climate Orbiter
- UAT is **not** testing the system - the system is already tested
- UAT helps find bugs that weren't found in earlier testing - We are testing how external users/systems interact with it
- UAT will help make sure your team is ready



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Question Time – Q&A and Upvoting

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Audience Q&A

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Get ready to put on your Thinking Caps…

…But first a break...

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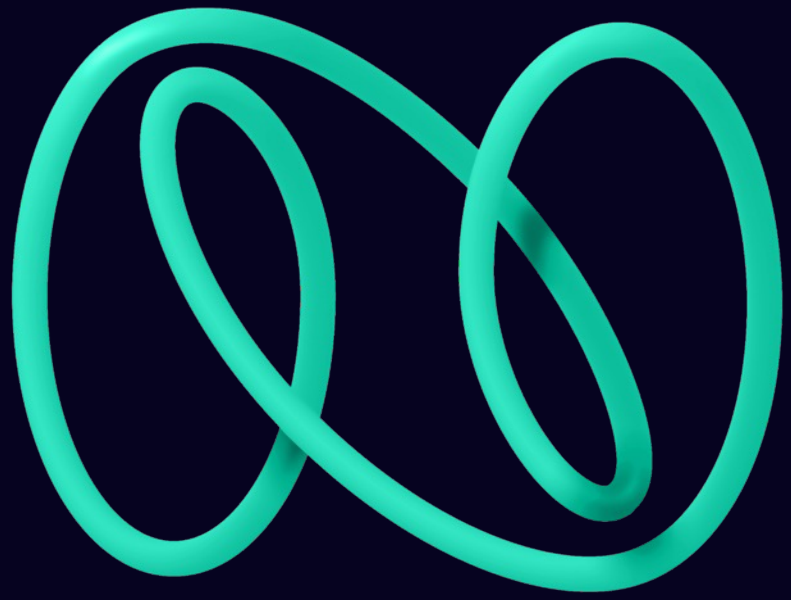
Break time!



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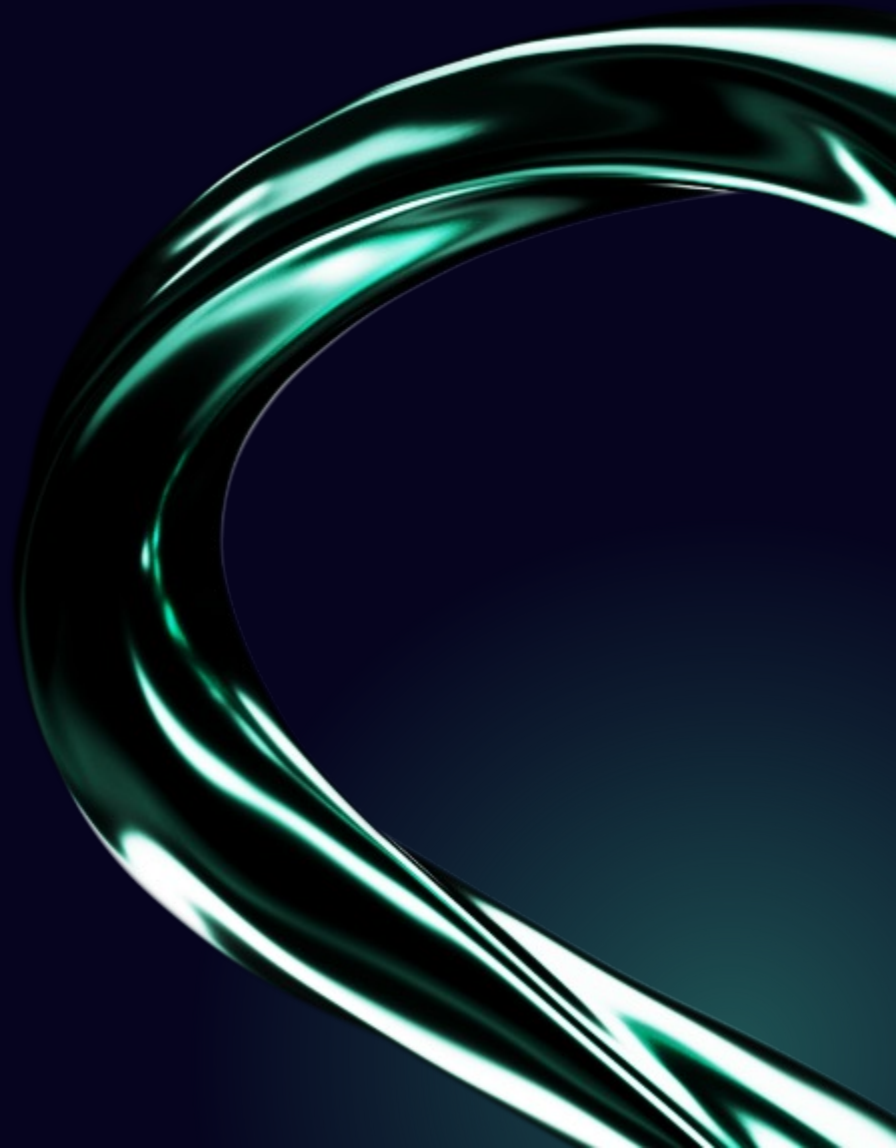
Practical – Who, What, Why of writing a User Story

Part 2



How we'll learn to write User Stories

See Examples → Group Work → Review & Discuss

Anatomy of a User Story

A short, simple description of a feature told from the perspective of the User

AS A [type of]

WHO?

I NEED [result]

WHAT?

SO THAT [reason]

WHY?

ACCEPTANCE CRITERIA

VERIFY!

Ideating User Stories:
Adopting a dog

- Thinking and writing about everything that happens around a dog adoption
- Consider from many angles - who, what, why
- Coverage - Trying to write stories for all the situations that are involved

WHO?

User

AS A [user role] / [persona]

- Person who is using the system / interacting / doing something
- Users may have different needs (and wishes)
- Some users may have multiple roles

		WHO	***WHAT***	***WHY***
	TITLE	**AS A**	**I WANT/NEED**	**SO THAT**
1		Parent		
2		Parent		
3		Parent		
4		Child		
5		ASPCA Employee		

WHAT?

Functionality

I NEED [result]

- Describing what they will be doing / achieving
- Not necessarily a need (could be a want)
- NOTE: This field describes what is happening, not the goal – sometimes it can be confusing

		WHO	***WHAT***	***WHY***
	TITLE	**AS A**	**I WANT/NEED**	**SO THAT**
1		Parent	Adopt a dog	
2		Parent	Adopt a loving dog	
3		Parent	Buy a guard dog	
4		Child	Own a dog	
5		ASPCA Employee	Verify that the Family will take care of the dog	

WHY?

Goal

SO THAT [reason]

- How does the user's need fit into the bigger picture?
- What's the benefit they're trying to achieve or the problem they are solving?

		WHO	***WHAT***	***WHY***
	TITLE	**AS A**	**I WANT/NEED**	**SO THAT**
1		Parent	Adopt a dog	My children will learn responsibility
2		Parent	Adopt a loving dog	Kids have companionship
3		Parent	Buy a guard dog	My family feels safe when I am away from home
4		Child	Own a dog	Teach it to do funny tricks AND dress it in costumes
5		ASPCA Employee	Verify that the Family will take care of the dog	The dog will have a good home AND not be returned to the shelter

Title

So you can find it easily later

- Short description of the User Story
- What is happening and how it impacts the user after it is done

		WHO	***WHAT***	***WHY***
	TITLE	**AS A**	**I WANT/NEED**	**SO THAT**
1	Get a dog so kids learn responsibility	Parent	Adopt a dog	My children will learn responsibility
2	Get dog for companionship	Parent	Adopt a loving dog	Kids have companionship
3	Get dog for security	Parent	Buy a guard dog	My family feels safe when I am away from home
4	Child wants a dog to play with (tricks and costumes)	Child	Own a dog	Teach it to do funny tricks AND dress it in costumes
5	Ensure the family will take care of the dog	ASPCA Employee	Verify that the Family will take care of the dog	The dog will have a good home AND not be returned to the shelter

VERIFY!

Acceptance Criteria

Verify that it is done

- Describes how you can tell whether the need has been met
- We will discuss them in more detail later…

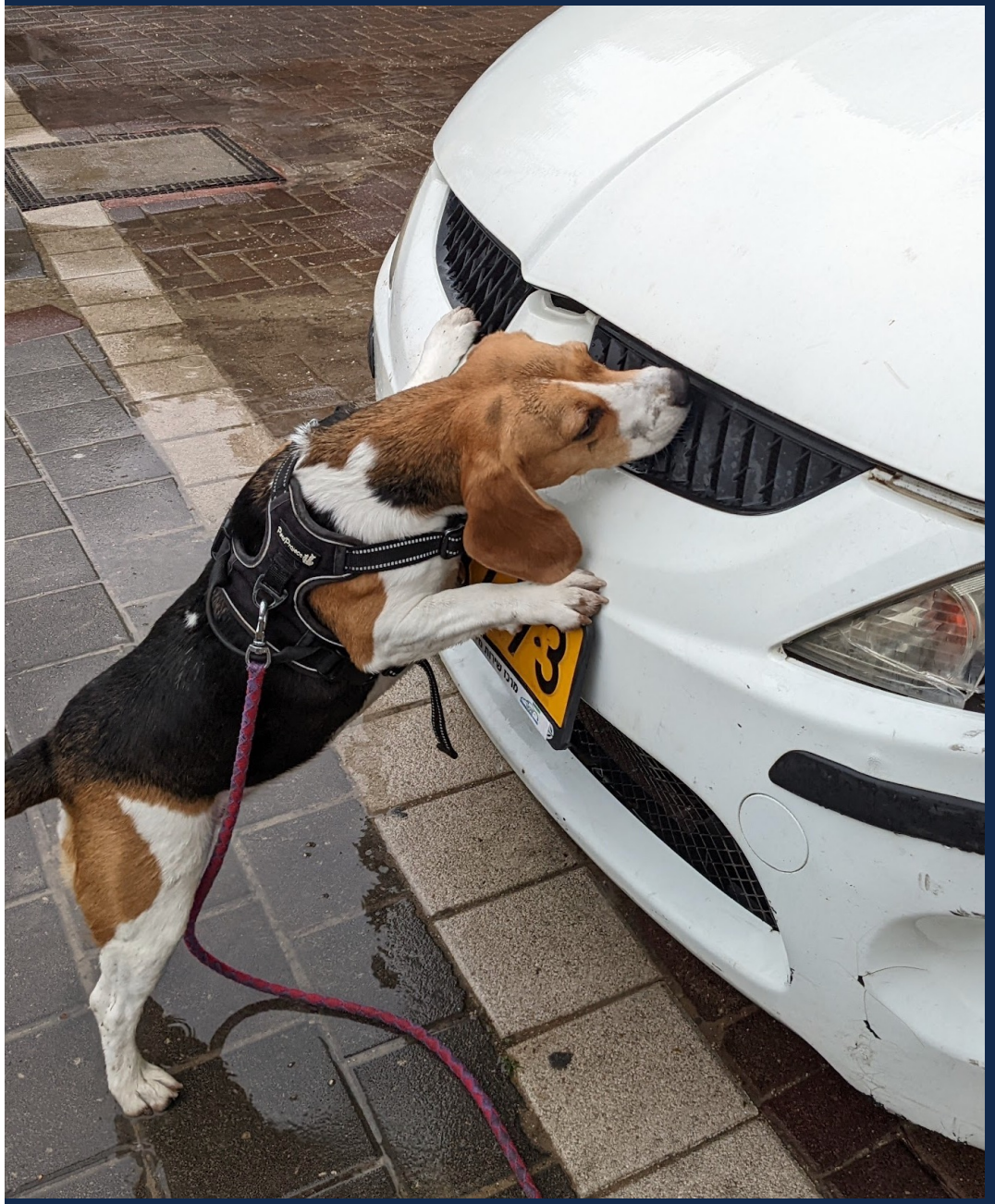
Let's add more User Stories together…

Please call out your suggestions as we go through more examples of adopting a dog

Ideating User Stories: Buying a car

- Break out into groups
- List some of the users that are involved
- List some of their needs
- List the reasons they need it
- Give it a meaningful title (to help others identify it later)

Onsite attendees: https://tinyurl.com/FloridaPalmOnsite
Remote users: https://tinyurl.com/FloridaPalmRemote

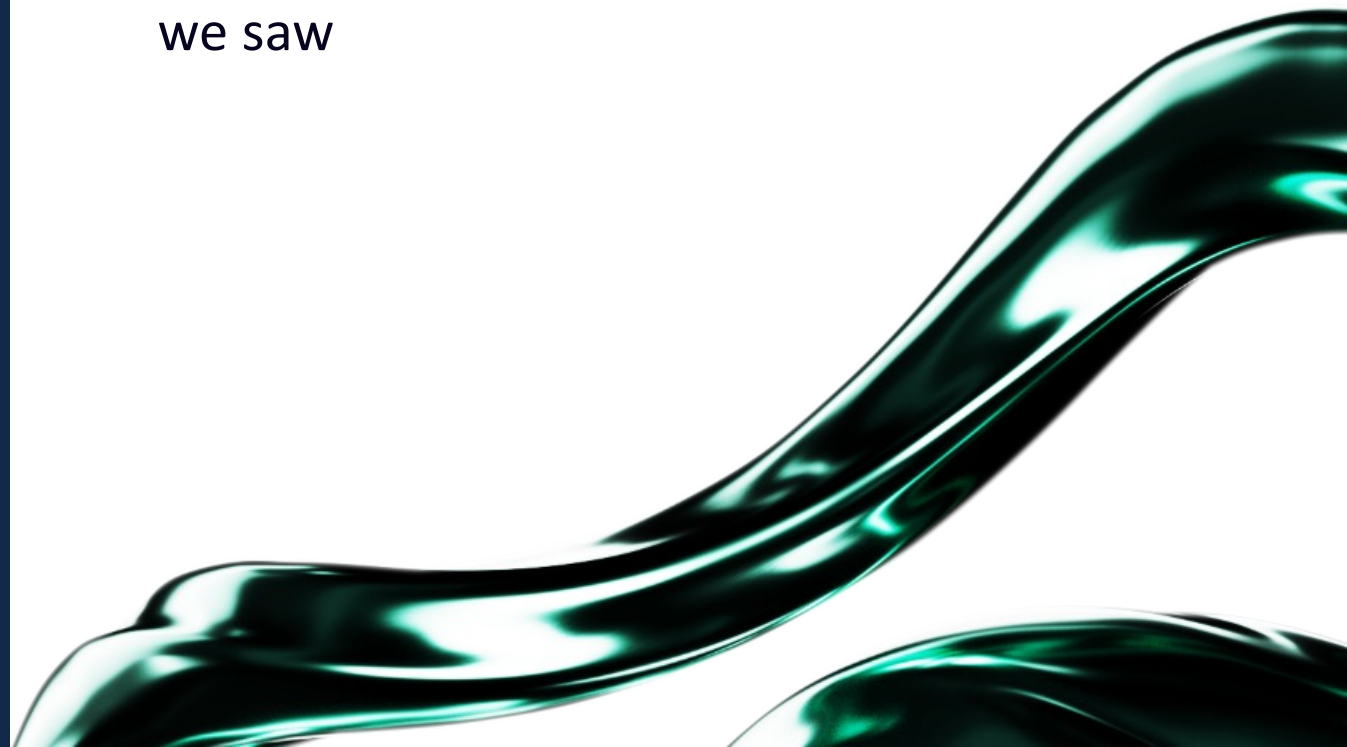


Conversation & Collaboration

- Working with others helps you think of User stories you wouldn’t have thought of alone
- User Stories are made to encourage conversation and cover lots of examples
- You will need to do this within your agency...

Review & Discuss

- Review and discuss some of the work you did – good and 'less good' examples we saw



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Question Time – Q&A and Upvoting

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Audience Q&A

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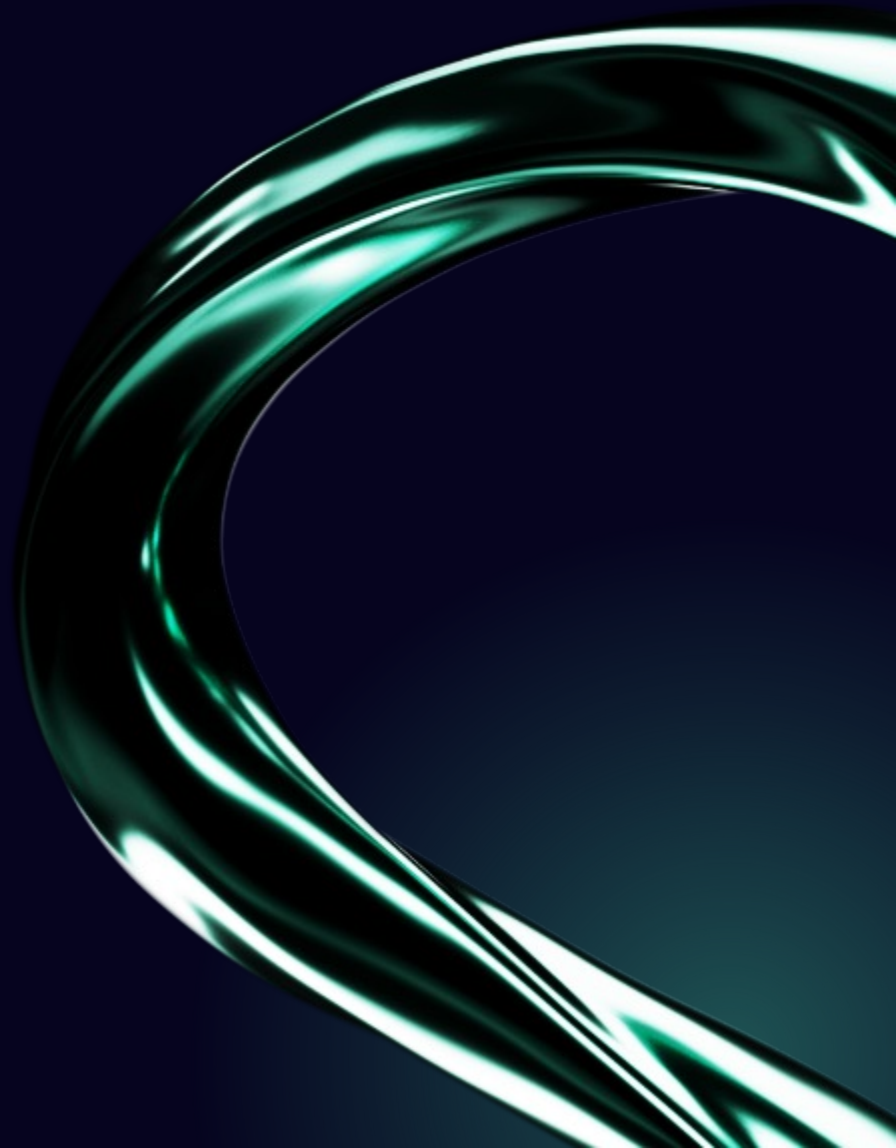
Practical – Verify your User Stories

Part 3



Acceptance Criteria

(more details)

- Describes how you can tell if the User Story has been completed correctly
- Avoid too many AC’s
- Keep criteria concise and easy to understand
- Requirements, not implementation details
- Include edge cases (negative scenarios) when needed

CAT: (Clear/Concise, Achievable, Testable)

As a child, I want to get a dog so that I have a companion

AC: Good example

- My parents explicitly approve of me getting a dog.
- A medical check confirms that no family members are allergic to dogs.
- I commit in writing to walk the dog three times a day.

Specific | Measurable | Testable

AC: Bad example

- Everyone should be “ok with the idea” of a dog.
- No one should have issues with a dog being around.
- I will do what is needed to take care of the dog.

Vague | Not Measurable | Not Testable

**Good acceptance criteria make success clear,
while bad ones leave room for confusion and interpretation.**

VERIFY!

Acceptance Criteria

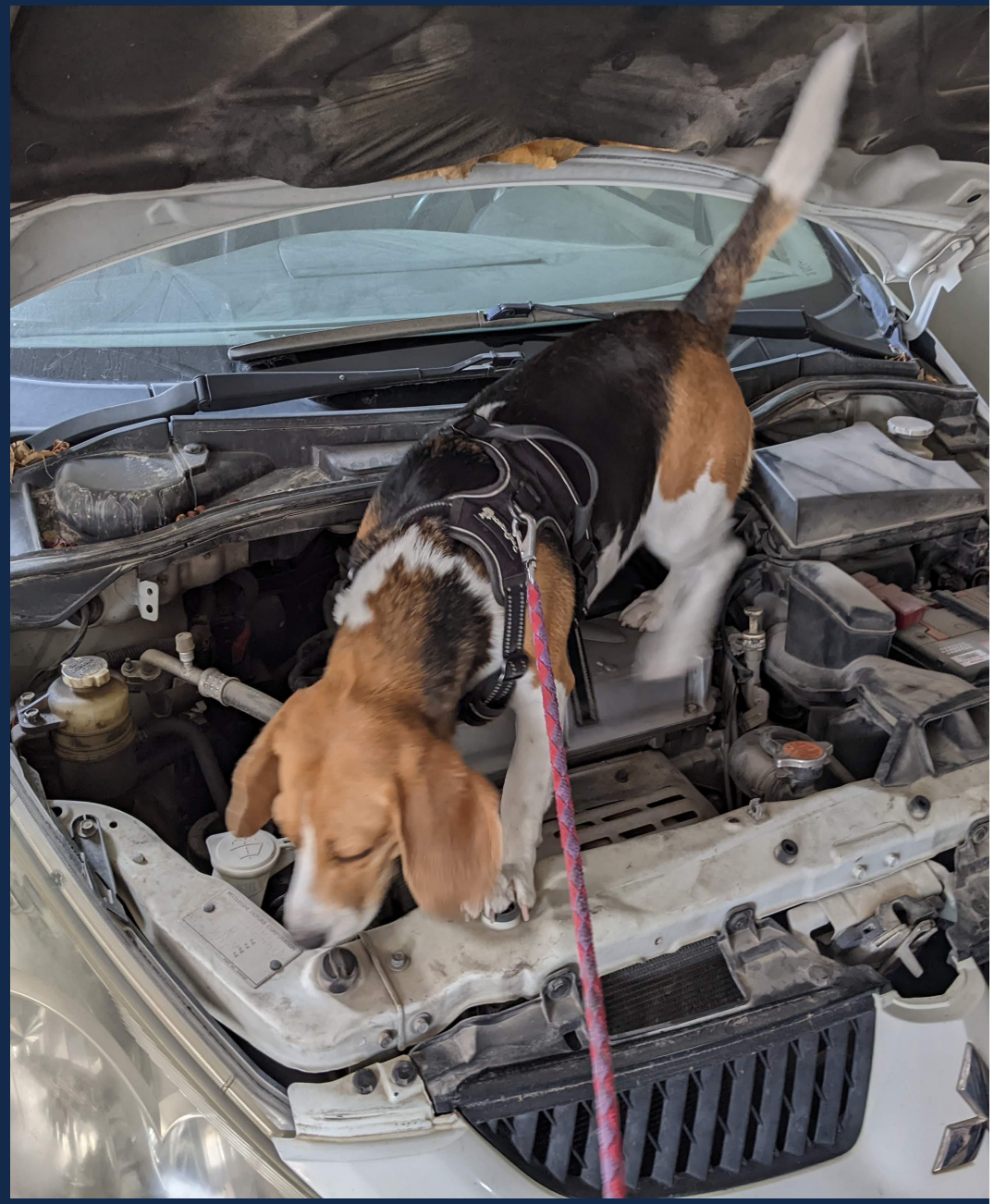
Verify that the User Story is done

- Describes how you will be able to tell whether the User Story has been completed correctly?

WHO	***WHAT***	***WHY***	***VERIFY***
AS A	**I WANT/NEED**	**SO THAT**	**ACCEPTANCE CRITERIA**
Parent	Adopt a dog	My children will learn responsibility	Kids commit to take the dog for a walk daily Dog care requirements are appropriate for children Kids are able to learn how to train the dog
Parent	Adopt a loving dog	Kids have companionship	Dog is of breed and temperment to cope with young children Kids have someone to play with when other siblings aren't around Dog remain friendly even when excited
Parent	Buy a guard dog	My family feels safe when I am away from home	Dog should be intimidating to villains Dog must be friendly to family and guests Dog can be trained to protect the family
Child	Own a dog	Teach it to do funny tricks AND dress it in costumes	Dog should be smart and athletic Dog should be easily motivated Dog should be patient while costumes are put on it Child is capable of understanding the dog's limits
ASPCA Employee	Verify that the Family will take care of the dog	The dog will have a good home AND not be returned to the shelter	Shelter employee prepares the family for pet ownership Family has a yard OR is committed to wallking dog 3 times a day

Let's add some Acceptance Criteria together…

Please call out your suggestions as we go through more examples of adopting a dog



Acceptance Criteria:
Buying a Car

- Each group should add acceptance criteria to a few of the User Stories they made earlier

Onsite attendees: https://tinyurl.com/FloridaPalmOnsite
Remote users: https://tinyurl.com/FloridaPalmRemote

Acceptance Criteria - Review and Discuss

- Analize your User Stories (the good/bad)
- Analize your Acceptance Criteria
- Can you identify any Acceptance Criteria that need improvement?

Remember – Practice makes perfect

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Question Time – Q&A and Upvoting

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Audience Q&A

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”Simplicity is the ultimate sophistication”

Leonardo da Vinci

Consistency fuels success

- Standardize across departments & agencies
- Improve communication
- Boost efficiency

Try this template:
http://tinyurl.com/FloridaPalmTemplate

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How confident do you feel now in being able to create actionable, testable User Stories?

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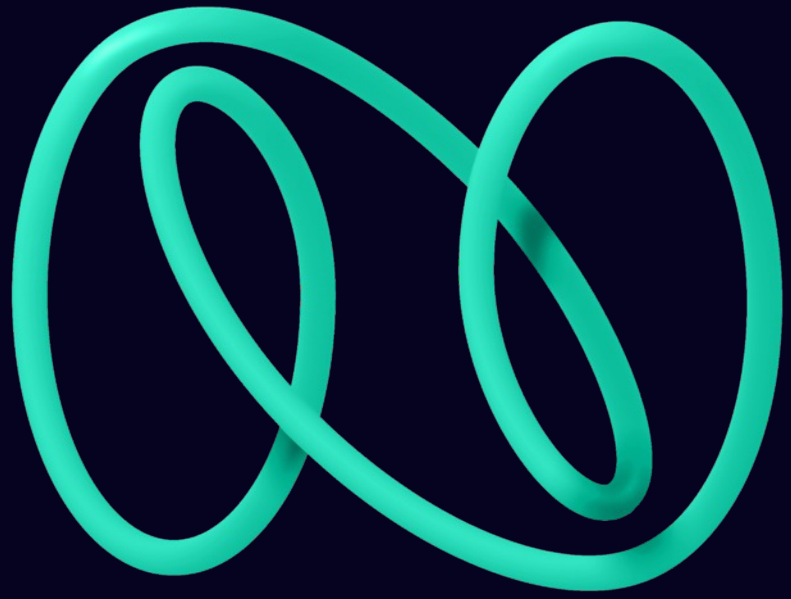
Thank You!



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Break Time

FLDS / Florida Palm handoff

User Acceptance Training Workshop

FL[DS] and Florida PALM

Florida PALM
Planning, Accounting, and Ledger Management

Workshop Agenda

- Making the Case
- Read it: Re-Cap of Nagarro Content
- Watch it: Model writing an effective user story.
- Do it: Putting Theory into Practice
- User Story Report Out and Discussion
- What’s Next
- Resources for Assistance
- Questions and Feedback Survey

Making the Case

What’s at stake and why is it important to identify and write good user stories, and manage them appropriately for Florida PALM?

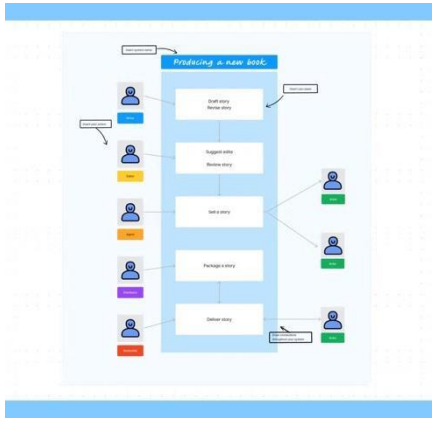
What’s in it for your Agency?

Read it: User Story Process

1. User Stories

- Describes a user, the feature they want or need to use, and how it helps them achieve their goal

2. Test Case



- A set of executable instructions for achieving a goal
- What to do to actually test the functionality
- Becomes part of a test plan to use later

3. User Acceptance Testing (UAT)

- Actual testing to validate the system and /or process works for end users

You know your business like nobody's business.

"Houston, we have a problem"

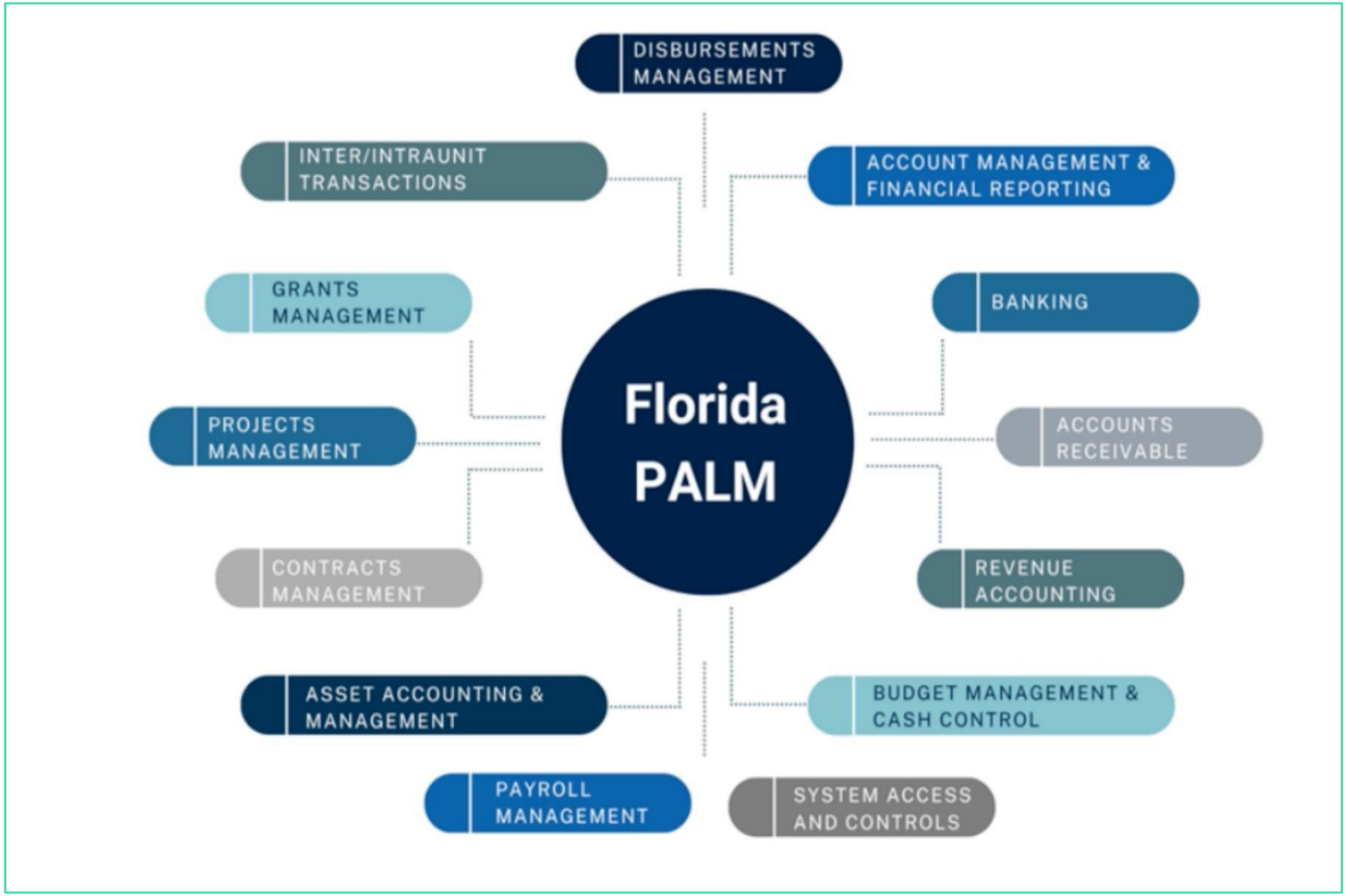
A good user story identifies the problem clearly before suggesting a solution

"Just keep swimming“

Continuous refinement of user stories as key to navigating the development process.

"Do or do not. There is no try"

User stories encourage actionable tasks that drive concrete progress, not big attempts



https://myfloridacfofloridapalm.us.document360.io/version1/docs/business-process-models-1

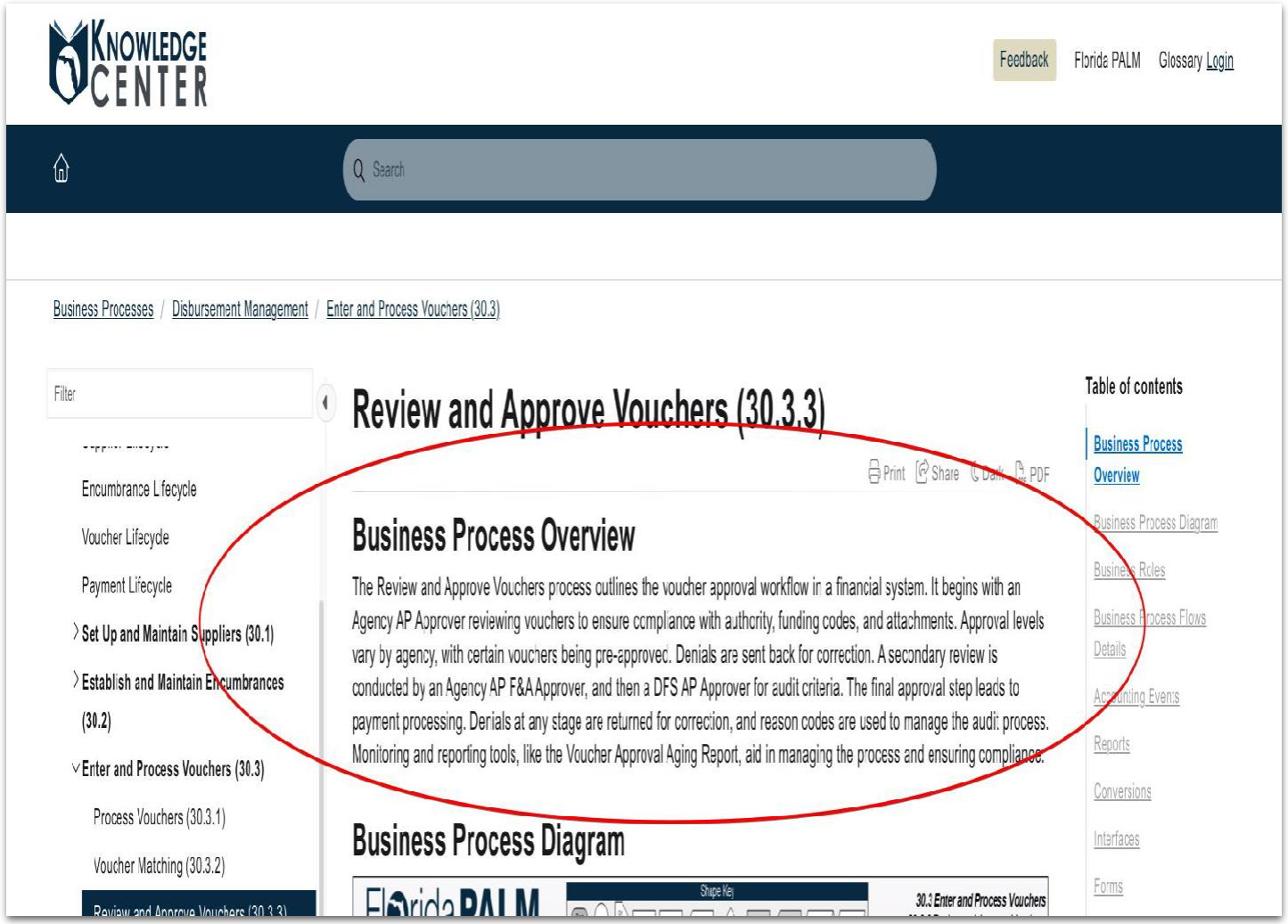
Your business will be supported by Florida PALM.

BPG	Process Module	Topic Name	Activity Name	Business Process Model	Role(s)	System Role(s)	Related Item (RICEFW Items)	Agency, DFS, Other
		The overarching subject of the Activity.	*The function completed using Florida PALM.*	*The associated BPM(s) is listed here.*	*Each role involved in the activity is listed individually.*	*Applicable system roles may be listed here.*	*Applicable Report, Interfaces, or Workflows associated with the Activity.*	
DM	AP	Processing Voucher	Entering a Voucher Manually	30.3.1 Process Vouchers	Agency AP Processor		APR024, KKR058, APR009, APR003, APR032, APR091, APR013, API129, API002, API031, API041, APW001	Agency
					Agency AP Retiree Voucher Processor			Agency
					Agency AP Spreadsheet Upload Processor			Agency
					AP Reporter			Agency and DFS
					Confidential AP Viewer			Agency and DFS
DM	AP	Processing Voucher	Using the Inbound Voucher Spreadsheet Upload	30.3.1 Process Vouchers	Agency AP Retiree Voucher Processor		APR024, KKR058, APR009, APR003, APR032, APR091, APR013, API129, API002, API031, API041, APW001	Agency
					Agency AP Spreadsheet Upload Processor			Agency
					AP Reporter			Agency and DFS
					Confidential AP Viewer			Agency and DFS
DM	AP	Processing Voucher	Reviewing, Approving and Denying Vouchers	30.3.3 Review and Approve Vouchers	Agency AP Approver		APR001, KKR058, APR009, APR003, APR013, APW001	Agency
					Agency AP Finance & Accounting (FA) Approver			Agency
					DFS AP Approver			DFS
					AP Reporter			Agency and DFS
					Confidential AP Viewer			Agency and DFS

Process Workflow

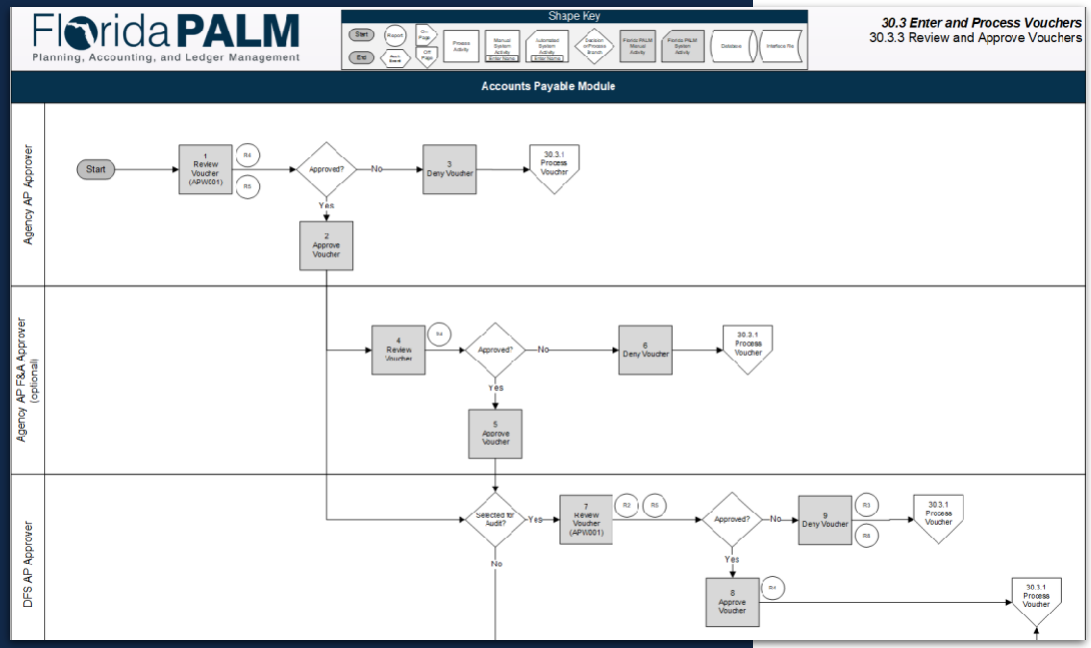
After today, you'll be able to start writing User stories for your workflows:

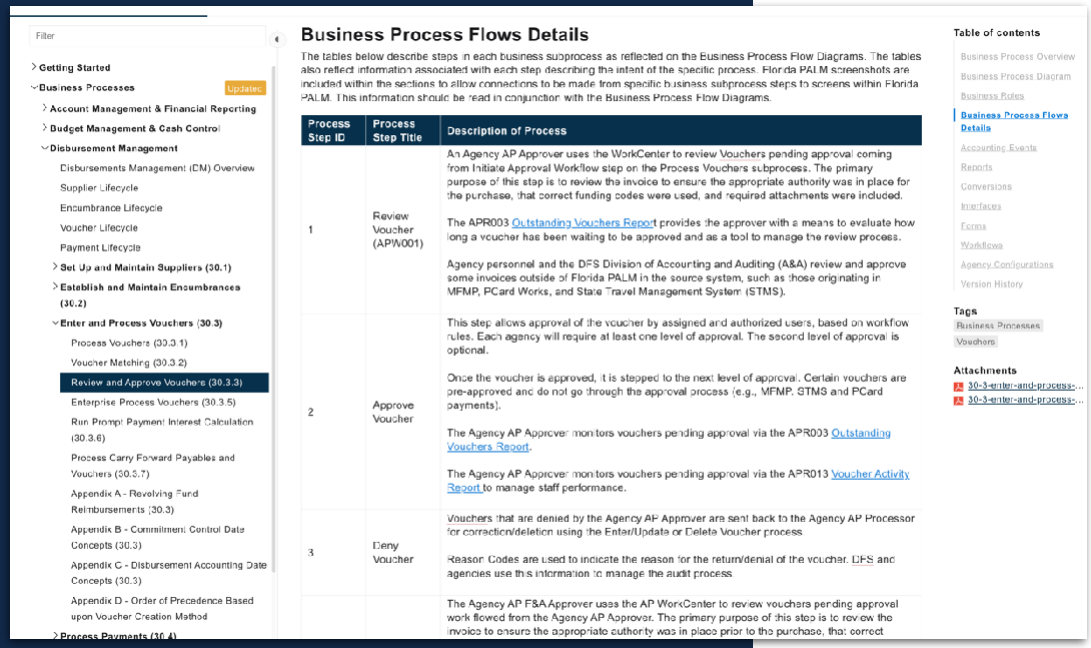
Who: As a [_____]
What: I want [_____]
Why: So that [_____]
Verify:



Watch it: Role Play

How would I construct a Florida PALM specific User Story?





Let's dive in

- Most of us can relate to Accounts Payable

	Good user story	Bad user story
Title/description	As an Agency AP Approver, I want to approve vouchers based on predefined workflow rules, so that I can ensure transactions are properly authorized and proceed further.	As an approver, I want to approve vouchers quickly and easily
As an	Agency AP Approver	An approver
I want/need to	Approve vouchers in the WorkCenter after reviewing details to ensure compliance and proper authorization.	Approve vouchers quickly and easily
So that (Outcome)	Transactions meet compliance standards, and move smoothly to the next step in the process.	To save time and make the process easier
Testability	Approvals follow the workflow order.	Quick and easy are vague. Lee defined results. They are subjective.

APPROVAL - The good, the bad and the ugly

- **Focused on convenience** prioritizes "quick and easy" over compliance and thorough review.
- **Vague:** does not specifically describe the tools, actions or outcomes desired.
- **Not verifiable:** not measurable, subjective.
- **Missing responsibilities:** does not account for following guidelines or using the right tools to get approval.

	Good user story	Bad user story
Title/description	As an Agency AP Approver, I want to deny vouchers that don't meet compliance requirements so that they can be corrected or removed from the approval process.	As an approver, I want to deny vouchers that don't seem correct
As an	Agency AP Approver	Approver
I want/need to	Deny vouchers through the work center by selecting a reason code, which routes them back to the processor for correction or deletion	Deny vouchers that don't meet the right criteria.
So that (Outcome)	To ensure that incorrect or incomplete vouchers are identified and resolved before approval and to maintain compliance.	To ensure that incorrect vouchers don't get approved
Testability	Denied vouchers are logged with details like the timestamp reviewer ID reason code and notifications are sent to the processor.	Denial should be recorded and documented

DENIAL - The good, the bad and the ugly

- **Vague Criteria:** statements like "don't seem correct“ are subjective and up for interpretation.
- **Missing tools or processes:** does not mention how the denial process works, for example use of codes or routing mechanisms.
- **Missing outcome:** focuses on preventing approval but doesn't explain what happens after denial or how the process supports.
- **Not testable:** fails to describe criteria for tracking actions, logging details, or notifying stakeholders.

Do it: Putting Theory into Practice

User Story Report Out and Discussion.

Your business will be supported by Florida PALM.

BPG	Process Module	Topic Name	Activity Name	Business Process Model	Role(s)	System Role(s)	Related Item (RICEFW Items)	Agency, DFS, Other
		The overarching subject of the Activity.	*The function completed using Florida PALM.*	*The associated BPM(s) is listed here.*	*Each role involved in the activity is listed individually.*	*Applicable system roles may be listed here.*	*Applicable Report, Interfaces, or Workflows associated with the Activity.*	
DM	AP	Processing Voucher	Entering a Voucher Manually	30.3.1 Process Vouchers	Agency AP Processor		APR024, KKR058, APR009, APR003, APR032, APR091, APR013, API129, API002, API031, API041, APW001	Agency
					Agency AP Retiree Voucher Processor			Agency
					Agency AP Spreadsheet Upload Processor			Agency
					AP Reporter			Agency and DFS
					Confidential AP Viewer			Agency and DFS
DM	AP	Processing Voucher	Using the Inbound Voucher Spreadsheet Upload	30.3.1 Process Vouchers	Agency AP Retiree Voucher Processor		APR024, KKR058, APR009, APR003, APR032, APR091, APR013, API129, API002, API031, API041, APW001	Agency
					Agency AP Spreadsheet Upload Processor			Agency
					AP Reporter			Agency and DFS
					Confidential AP Viewer			Agency and DFS
DM	AP	Processing Voucher	Reviewing, Approving and Denying Vouchers	30.3.3 Review and Approve Vouchers	Agency AP Approver		APR001, KKR058, APR009, APR003, APR013, APW001	Agency
					Agency AP Finance & Accounting (FA) Approver			Agency
					DFS AP Approver			DFS
					AP Reporter			Agency and DFS
					Confidential AP Viewer			Agency and DFS

Now your turn to try one

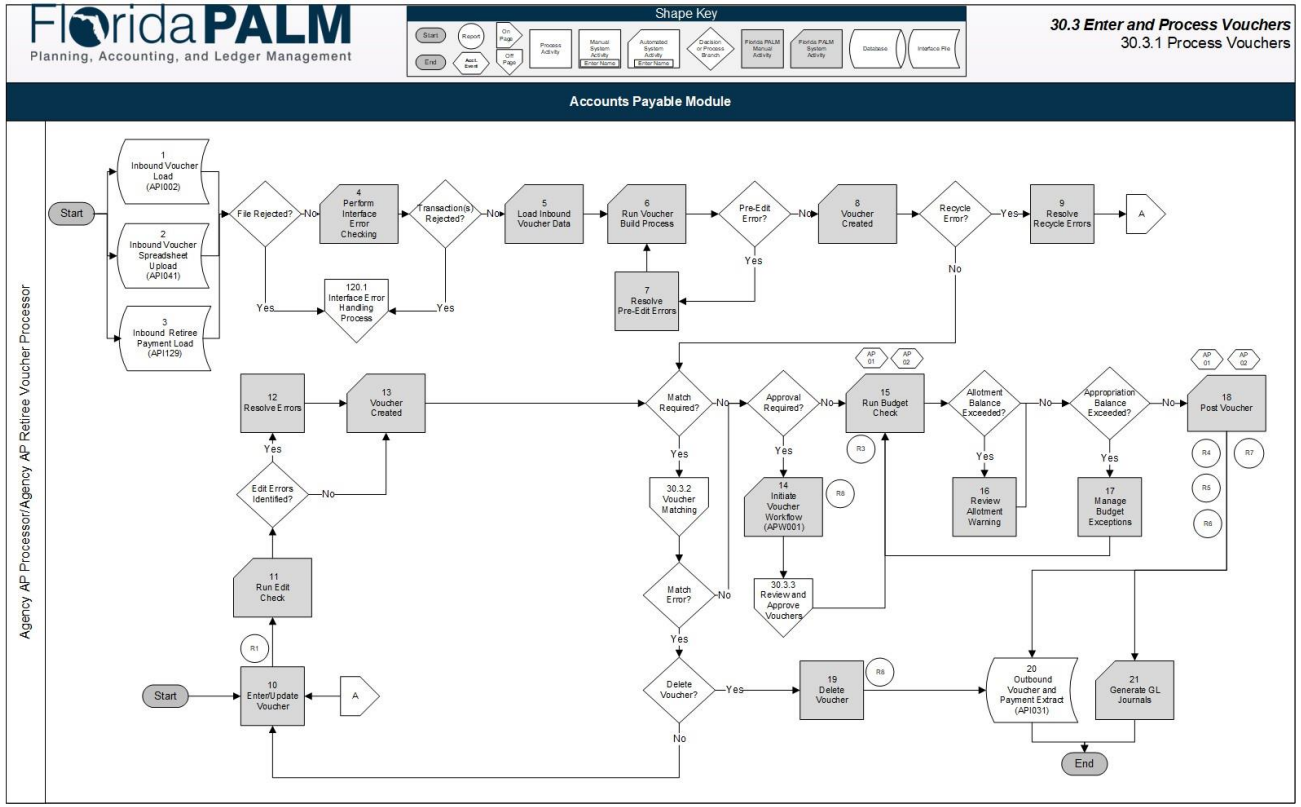
- Write a user story for **processing** a voucher

Feedback and Workshopping

"Everything should be made as simple as possible, but not simpler"
- Albert Einstein

When to simplify?

- **System processes:** If the system operates differently depending on the selection of different data values
- **Different outcomes:** If the story addresses multiple outcomes (e.g. approval, denial, monitoring), split it into multiple stories
- **Role-Specific actions:** Different rules (e.g. processor, approver, etc. are involved)
- **Complexity:** If a story includes many steps or features, split it into simpler testable bite-size stories.
- **Testing requirements:** If different parts require unique test cases, create separate stories.

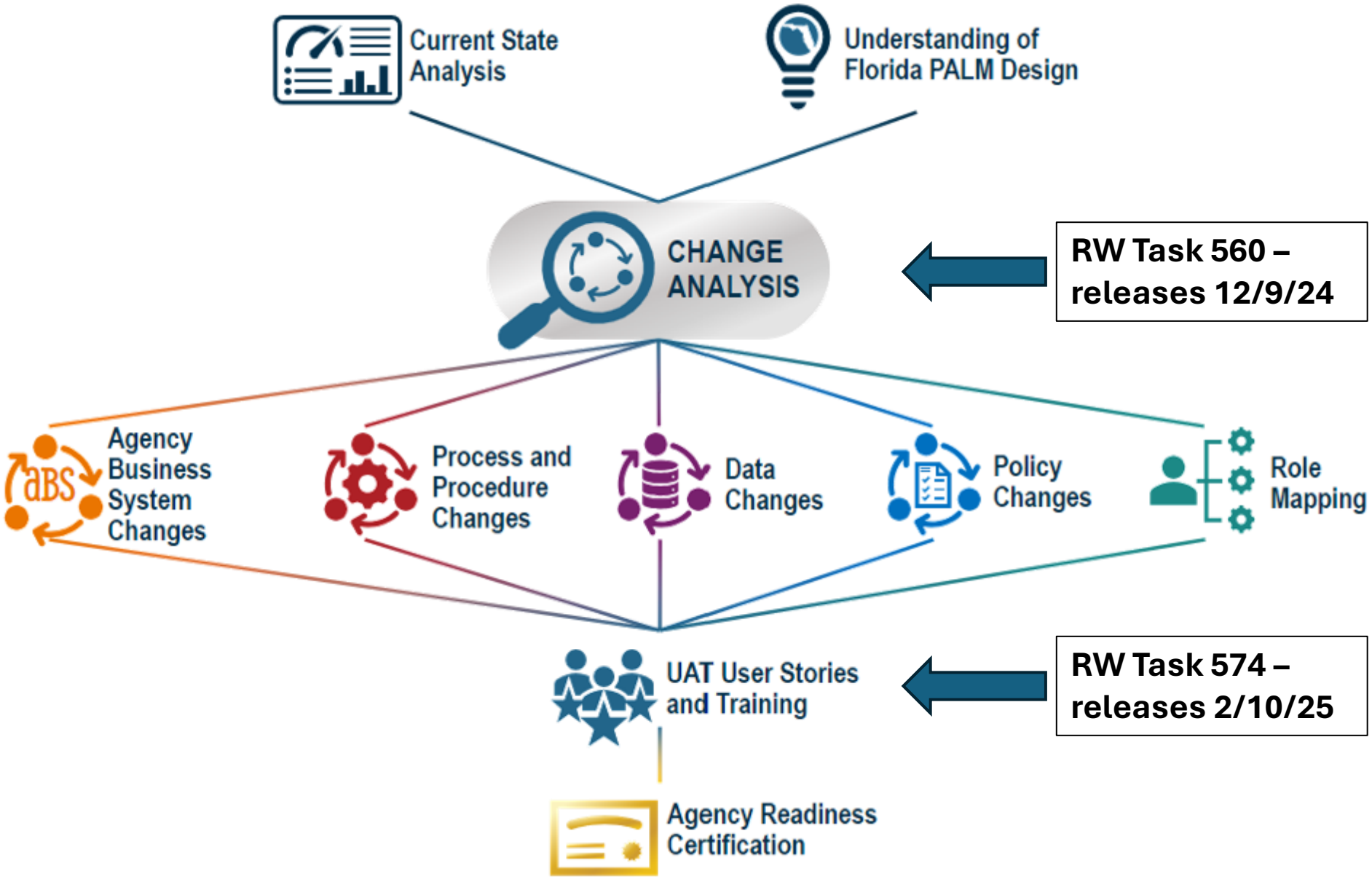


Other reasons that you might want to split or simplify a user story:

- **Ambiguity**
- **Different acceptance criteria**
- **Dependent or sequential tasks**
- **Independent business value**

What’s Next?

Path to Agency Readiness



Resources for Assistance

- Readiness Coordinator
- Florida PALM
- PMI to register your PDU’s

Thank you!