

Test summary report

**VERSION 1.0**

This template was created to enable departments to more easily develop their project plans. The Department of Technology, Consulting and Planning Division, created this template based on its experiences. The template relies on industry best practices combined with decades of experience on California state information technology projects. The way it was structured is to enable a department to complete the information related to its project without having to write background information related to the discipline. A department may use as much or as little of the template as it wishes.

**Template Instructions:**

* ***Instructions for completing*** this template – written for the author of the project plan - are encased in **[ ]** and the text is ***italicized*** *and* ***bolded.***
* *Examples* are provided as a guideline to the type of sample information presented in each section and the text is *italicized*.
* Boilerplatestandard language for each section is written in the document font and may be used or modified, as necessary.
* A department’s project specific information goes within the brackets ***<< >>***.
* *Informational text is italicized* within square brackets [ ] for informational purposes to the person who has to create the plan and includes background information, explanation, rationale, etc.

DOCUMENT HISTORY

| **DOCUMENT APPROVAL HISTORY** | |
| --- | --- |
| Prepared By |  |
| Reviewed By |  |
| Approved By | *<< The designated responsible person(s) specified in the organization’s test policy and strategies or project approves the document. Typically, the Test Manager is the designated approver. Insert name(s) here and have them sign it. >>* |

| **DOCUMENT REVISION HISTORY** | | | |
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| Date | Document Version | Revision Description | Author |
| 02/06/2015 | 1.0 | Initial Version | J. Fong |
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# INTRODUCTION

The Test Summary Report summarizes the results of the testing activities, provides an evaluation based on the results, advises on the product’s release readiness, and documents any known product shortcomings. This report allows the Test Manager to summarize the testing and to identify limitations of the software and the failure likelihood. There should be a Test Summary Report that corresponds to every test plan. In essence, the Test Summary Report is an extension of the test plan and serves to “close the loop” on the plan. This document can be used during change control to summarize testing efforts in preparation for production deployment.

This document is organized into two components: Test Summary Report template and Appendix (i.e., Test Measures (e.g., charts, graphs]).

# test summary report template

*[The following template is provided for your use. If the project does not use this template, it should use some method to report test results before moving to the next test cycle.]*

Test Summary Report for << Project Name >>

***[Instructions: Complete a Test Summary Report for each Test Level.]***

|  |  |  |
| --- | --- | --- |
| **GENERAL INFORMATION** | | |
| **Test Level: *[Select the Test Summary Report Test Level.]* Summary Date: *<< MM/DD/YY >>***  Unit  Integration  System  Performance  Acceptance  ☐ Other ***<< Specify Test Level >>*** | | |
| **Application:**  ***[Specify the System or Function Under Test]*** | | **Build, Version/Revision Number:**  ***[Specify the Build Number and Version Number/ Revision Number for the System or Function***  ***Under Test.]*** |
| **SUMMARY** | | |
| **TEST PERFORMED** | * ***[Describe the high level scope of the project’s test activities (e.g., functions, features, systems, subsystems), test approach taken, and identify and evaluate the test items that were tested*** * ***Document any pertinent test document references such as the test case, test log, and incidents]*** | |
| **DEVIATION (VARIANCES) & RESIDUAL RISK** | * ***[Describe any variances or changes from the planned test as specified in the Master Test Plan (e.g., test items from the test cases)*** * ***Describe the reason for the variance*** * ***Document residual risk to address the mitigation plans for the deviation (e.g., special release to fix outstanding issues)*** * ***If this section does not apply, enter N/A.]***   *Example: Additional test cases are needed to increase test coverage due to problems encountered while executing tests for system functionality XYZ.* | |
| **TEST COMPLETION EVALUATION** | * ***[Specify the extent of how testing met the specified test completion criteria against the Master Test Plan and explain what criteria was not met*** * ***Provide an overall assessment of the test conducted including the depth and breadth of the testing process based upon the system test documents, test plan, test cases, and incidents*** * ***Document any testing inclusion and/or exclusion and the reason for the inclusion and/or exclusion (e.g., features not covered or tested)*** * ***Document any assumptions and/or limitations encountered during testing.]*** | |
| **FACTORS THAT BLOCKED PROGRESS** | * ***[Specify the factors which delayed or impeded the progress of the testing*** * ***If this section does not apply, enter N/A.]***   *Example: The scheduled Cycle 1 testing extended beyond the planned completion date due to test resource absences.* | |
| **TEST MEASURES** | * ***[Specify the measures applied to track the test progress and status.*** *Example: Measurements on Test Cases, Defects, Incidents, Test Coverage, Activity Progress, Test Effectiveness, and Resource Consumption* * ***Document detailed test measurement using the charts in the Appendix]*** | |
| **TEST DELIVERABLES & REUSABLE ASSETS** | * ***[Specify the test deliverables and artifacts produced as a result of the test effort*** * ***Indicate the reusable assets and storage location for easy accessibility]*** | |
| **LESSON LEARNED** | * ***[After collectively meeting with the team to reflect on the completion of the test efforts, specify testing strengths and opportunities for improvement from a project, product, and process perspective]*** | |
| **FINAL RECOMMENDATION** | * ***[Summarize the final recommendation of the application readiness to the next Test Level taking into consideration the Test Level’s entrance and exit criteria (e.g., System Test to Acceptance, Acceptance Test to Production).*** * ***Consider all section results when providing the final recommendation: Test Performed, Deviation (variances), Risk Mitigation, Test Completion Evaluation, Factors that Blocked Progress, Test Measures (e.g., Defects), Test Deliverables and Reusable Assets, and Lessons Learned]***   Test Phase Completion Approved  Test Phase Completion Approved Conditionally Explanation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Test Phase Completion Disapproved  Explanation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | |

| **APPROVALS** | | |
| --- | --- | --- |
| NAME/TITLE | SIGNATURE | DATE |
| *<<Test Manager>>*  *<<John Doe, Test Manager>>* | *<<Signature>>* |  |
| *<<Project Manager >>*  *<< Jim Doe, Project Manager>>* | *<<Signature>>* |  |
| *<< Technical Manager >>*  *<< James Doe, Technical Manager>>* | *<<Signature>>* |  |
| *<< Business Manager >>*  *<< Joseph Doe, Technical Manager>>* | *<<Signature>>* |  |

1. test measure examples

The Appendix provides three examples for measuring test progress: Test Effort Summary, Test Coverage, and Defect Report. The following tables may be referenced as support data within the Test Measure section of the Test Summary Report and could be illustrated in the form of presentation graphs or charts.

*Examples*

***Test Effort Summary***

*The Test Effort Summary table provides the test results for a particular build or test cycle relative to the test cases that were designed and executed. For each build or test cycle, the table captures the number and percent of test cases in various states (e.g., passed, failed, stopped) and the number of defects found. For example, if a test cycle revealed that there were a high number of test cases that failed or stopped with many open defects, the Test Manager may use the information to determine the root cause of the problem and establish test remediation efforts.*

*The table below summarizes the overall test results for the builds that were tested for* ***<< software under test >>*** *during* ***<< time period >>***.

| *Builds/*  *Build Date* | *Total Designed Test Cases* | *Total Test Cases Executed* | *No. Of Test Cases Passed* | *% Of Passed Test Cases* | *No. Of Test Cases Failed* | *% Of Failed Test Cases* | *No. Of No Test Or Stopped Test Cases1* | *% Of Stopped Test Cases* | *Defects Found* |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Final Build*  *<< Date >>* |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
| *Build 1 / Cycle 1*  *<< Date >>* |  |  |  |  |  |  |  |  |  |
| *Build 2 /*  *Cycle 2*  *<< Date >>* |  |  |  |  |  |  |  |  |  |
| *Build 3 / Cycle 3*  *<< Date >>* |  |  |  |  |  |  |  |  |  |

*Note: Each new build will cause another execution of the test cases. This re-execution is called a cycle. It is also possible to have a cycle without a new build (e.g., modified test cases would cause this to occur). The Test Efforts Summary should include tracking of both cycle and builds.*

*1 Reason for the Test Case not being Tested or Reason why the Test Case Stopped during execution*

***[The table below documents the test cases that were not tested or stopped and the reasons why the test cases were not executed. The test case ID and Description entries below should reflect a detailed account of the number of “No Test or Stopped Test Cases” as specified in the Test Effort Summary table above.***

***Specify the Test Case ID, brief description, and the reason why the test case was not tested or stopped.]***

| *Test Case ID and Description* | *Reason Not Tested Or Stopped* |
| --- | --- |
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***Test Coverage***

*The table summarizes the test coverage criterion used in determining the testing of systems, subsystems, logic, functions, or features. If the project is using a tool, use the tool’s reporting capabilities to report the test coverage. Otherwise, a Test Coverage Matrix could be created using either Excel or Word. Additionally, a Requirements Test Coverage Matrix template may be used to track and report requirements coverage.*

| ***Test Coverage***  ***(e.g., Logic, Function, Feature)2*** | ***Prioritization***  ***(e.g., High, Medium, Low)*** | ***No. Of Possible Test Cases*** | ***Actual No. Of Test Cases*** | ***% Test Coverage*** |
| --- | --- | --- | --- | --- |
| *Requirement 1* |  |  |  |  |
| *Requirement 2* |  |  |  |  |
| *Requirement n* |  |  |  |  |
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*2 The Test Coverage will differ depending on the Test Level.*

* *Integration Test - Logic Coverage*
* *Function Test – Function or Feature Coverage (e.g., Requirements, Use Case, Flow within the Use Case, Change Control)*
* *System Test – Function or Feature Coverage (e.g., Requirements, Use Case, Flow within the Use Case, Change Control)*
* *Performance Test - Function or Feature Coverage (e.g., Functional and Non-Functional Requirements, Use Case, Flow within the Use Case, Change Control)*
* *User Acceptance Test – Function or Feature Coverage (e.g., Requirements, Use Case, Flow within the Use Case, Change Control)*

***Defect Report***

*This table provides a high level overview of the application quality in terms of defect quantities, types, severity level, and final state. The defect quantities should be compared to the exit criteria as stated in the Master Test Plan or level test plan to verify whether the number of defects by type and severity level are appropriate.*

*Note: The Severity Level of Defect values (e.g., Critical, Major, Average, Minor) are examples and may vary depending on the project. The appropriate severity level categories for the project should be inserted in the “Severity Level of Defect” column.*

*If a Defect Tracking System tool is available, generate the graphical reports and paste the information here.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Severity Level Of Defect*** | ***Total No. Of Defects Found In The Test Level*** | ***Total No. Of Defects Closed At The End Of The Test Level*** | ***Total No. Of Defects Open At The End Of The Test Level 3*** | ***Describe Impact To Application Of Postponed Function*** |
| *Critical* |  |  |  |  |
| *Major* |  |  |  |  |
| *Average* |  |  |  |  |
| *Minor* |  |  |  |  |

*3 The open defect may have been be postponed and fixed in a future planned release.*