Chapter 6

Information Systems Development Methodology

for the

Environmental Screening Tool

Environmental Screening Tool

Development Stage

Implementation Plan

Unit Testing Results

Updated User Handbook

System Test Plan

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Chapter 1 Introduction

The Florida Department of Transportation (FDOT) is using a phased approach to implement the new Efficient Transportation Decision- Making (ETDM) Process. Environmental Screening Tool (EST) training, user support, and maintenance are an integral part of that implementation and coincide with the deployment of the ETDM Process. EST, version 1, production release occurred in March 2003, with the beginning of statewide training on the ETDM Process. The initial release, training, and support of the EST modules took place concurrently with each scheduled ETDM event. Following the first year of ETDM implementation, a second version of the EST was developed. This implementation plan includes the initial implementation as well as long-term maintenance.

Chapter 2 Training

The EST training program consists of workshops that provide participants an overview of EST functions and the skills to navigate the EST. Two training methods are used to build users' EST skills: 1) Hands-on training presented in a lab setting where the participants actively use the module and work through examples and 2) Web-based training classes through eCONNEX software. Given the number of users and their organizational, functional, and geographical disbursement, it is imperative to supplement the hands-on training to provide numerous engaging training opportunities. The Web-based classes consist of a set of users logging on to a Web site and calling into a teleconference line. Once there, class is conducted as if it were in a lab setting. Participants are able to see the instructor's presentation from their office computer, as well as interact with the instructor and work through examples. Initial statewide ETDM Process training finished in May 2003. Following these training sessions, the first round of hands-on training for the Input Utilities and ETDM Project Manager modules was scheduled to coincide with the initial upload, update, and management of the proposed projects found in the Metropolitan Planning Organization (MPO) Long-Range Transportation Plans and FDOT Cost-Feasible Plans. This was followed by hands-on training on the Environmental Technical Advisory Team (ETAT) Review Screens and Sociocultural Effects Module. Web-based training classes are scheduled for each module on a monthly basis. Follow-up hands-on training is scheduled on an annual basis in the District offices.

Chapter 3 User Support

Support of the EST is available to the user community in several formats. The first is comprehensive online self-help information, providing access to the ETDM manuals and EST user guide, PowerPoint presentations describing the ETDM Process and EST modules, frequently asked questions, quick reference guides, and short movie clips demonstrating each module to reacquaint the user and reintroduce the modules navigation and intended functions. A Help desk email address enables users to report application problems and suggest enhancements. Secondly, at FDOT, a central office Help desk has been established to field user support calls. Using either eCONNEX or the Lotus Sametime software, the Help desk can visibly demonstrate to the user how a task is accomplished with the EST. A user can log on to a Web site and see the shared Help desk support desktop as the support specialist talks the user through the steps over the phone. If the problem requires local support on the user’s computer, the Help desk can use the remote access technologies within eCONNEX and Sametime to reach out and make any necessary local configuration changes.

Chapter 4 Maintenance (Updated 7/31/2009)

The EST system maintenance is handled through a change management process. The process starts with identifying system changes needed, including defects to be corrected, updates to functions and modules, new enhancements, access to new data, or additions or updates to the automated Geographic Information System (GIS) analysis routine. Identified changes are reviewed to ensure clarity, completeness, feasibility, and consistency. The changes are provided to the executive steering committee for prioritization..

Prioritized needs for application changes are entered into the issue tracking system for assignment and resolution. Changes to the application are first made on the programmers' local computers and then merged to a development server for review and testing. Once complete, the updates are moved to the stage platform for user testing. Testers provide error logs to the technical team at the end of the testing period. Any errors are corrected on the development platform, and updates are migrated back to the stage platform. After approval of a Change Request by the FDOT technical project manager, the update is migrated to the production platform. For significant enhancements, Web-based training is made available on the stage platform prior to moving the program to production. The methods and procedures used by the technical team to maintain and upgrade the EST application are detailed in the Development Procedures, provided in **Chapter 9 – Maintenance Stage.**

EST data set maintenance is handled through formal agency operating agreements in which participants agree to review and refresh the data at a defined interval. Depending on the data and the agency, this process can be weekly, annually, or longer. Other resource data sets that are housed at the Florida Geographic Data Library (FGDL) and used by the EST (but do not have an ETAT agency representative) are reviewed and refreshed by the GeoPlan Center as they become available. The single largest data set maintenance related task remains the collection, integration, and management of local government data into the EST database. These data sets and supporting GIS analysis represent the greatest resource expenditure because of the volume of disparate data. The GeoPlan Center has been tasked with approaching each MPO and county to identify their data and assess the feasibility of integration. The results of this effort are presented to the executive steering committee for review and prioritization.

Unit Testing Results

Results of Development Team testing for the Environmental Screening Tool (EST) are documented and tracked in the error and enhancement tracking software called Bugzilla. Testing results for enhancements in development or subsequent ISDM stages during the following periods are included in the Maintenance Log in **Chapter 9** of this ISDM submittal.

April 1, 2007 through September 30, 2007

- Public Access Site
- Agency On-line Invoicing
- EDMS Integration
- Performance Management
- Cumulative Effects
- AN/Federal Consistency
- Summary Degree of Effect
- New Screening Summary Report Interface
- My GIS Analysis Results
- Sociocultural Effects Evaluation Summary Report
- Degree of Effect = Dispute
- Integrated Map Viewer
- Non-viable Alternatives

October 1, 2007 through June 30, 2008

- AN/Federal Consistency
- Security Enhancements
- Invoicing Enhancements
- Community Characteristics Inventory (CCI) Enhancements
- Integrated Map Viewer
- Eliminated Alternatives
- Milestoning for Displaying Potential Lead Agencies on Public Site
- Milestone Grouping
- EDMS BLOB Viewer (Document Retrieval)
- Project Manager Tools and Reports Enhancements
- Identifying Cooperating Agencies (for Class of Action)
- Identifying No Further Agency Involvement

July 1, 2008 through December 31, 2008

- Community Characteristics Inventory (CCI) Enhancements
- Integrated Map Viewer
- QA Reports
- Project Tracker
- Invoicing – Log Off-line Activities
- Require Public Comment Summary or Justification for No Comments
- AN Transmittal List – User Interface
- AN Transmittal List – Excluded Jurisdictional Contacts
- ISDM Page Description Tools
- Performance Management – Project Schedule
- Hardcopy Maps
- Project Website Links

January 1, 2009 through December 31, 2009

- Document Review
- SCE Participation Report
- Performance Management Report Enhancements
- 2010 ETDM Surveys
- Welcome Page Enhancements
- Name Alternatives
- Quarterly Participation Report Enhancements
- Invoicing Enhancements (Agency Activities and Activity Upload Batch)

January 1, 2010 through August 31, 2011

- Map Editor Tools
- Map Viewer User Interface
- ETDM Calendar Enhancements
- GIS Analysis Results Report Enhancements (Feature Level)
- Performance Management Report Enhancements
- SCE Participation Report
- AN Transmittal List Batch Uploader
- Update Data FAQs Data (Questions 1-3) to be interactive
- Search Function for finding forms and reports
- Quarterly ETAT Participation Reports

- Updates to the Navigation Menus and GUI
- New On-line Help Interface (Doc2Help)
- Track Local Agency Program (LAP) Projects
- Training Videos Page
- Enhancements to Edit AN Package tool
- EDMS Process Fixes and Enhancements
- FTA Exemption and Notification Enhancements

Updated User Handbook

The updated User Handbook for the Environmental Screening Tool (EST) is provided in **Appendix E** of this ISDM submittal.

System Test Plan

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List of Attachments

Chapter 1 Introduction (Updated 8/29/2008)

This plan provides the approach that will be used for acceptance testing Environmental Screening Tool (EST) enhancements and bug fixes. The goal of testing is to resolve any coding errors and to ensure that the application meets all user requirements. Most bug fixes and simple enhancements may be verified against the acceptance criteria, as described in **Chapter 2**, using the generalized testing procedures found in **Chapter 3**. Major enhancements will have an individually tailored test plan for ensuring quality control, as described in subsequent chapters.

Chapter 2 Acceptance Criteria (Updated 11/30/2007)

Testing will result in a system that meets or exceeds the following acceptance criteria:

- Prior to deploying to production, application code changes will be free of any known bugs of normal or higher than normal severity. Minor errors such as formatting or those where easy workarounds are present may be postponed upon the discretion of the client's technical project manager. Any errors which are subsequently identified by users will be entered into an issue tracking system and prioritized for resolution.
- A Data Element Assemblies documentation template is completed, including:
  - Purpose of the program
  - Data element definitions
  - Identification of business rules applicable to the program
  - Identification of other programs which call and are called by the program

  (See Appendix D for complete list.)
- Individual programs include the following minimum documentation:
  - Comment header with a title, author, and brief summary of the program's purpose
  - In-line comments at each major logical block of code, briefly describing functionality that is occurring within that block
  - Comments describing non-trivial logic or complex statements
- Business rules are enforced, including roles and privileges, security, and error checking.
- Programs meet approved GUI design specifications.
- Minimally, program functionality meets the defined user requirements. Ideally, functionality delights the users and makes their tasks easier.

Chapter 3 General Testing Procedures (Updated 11/30/2011)

Each program will be tested individually and in common work processes to ensure the system meets the acceptance criteria specified above. Testing procedures are:

3.1 Programmer Testing

Prior to loading programs to the EST Development server, programmers will test and correct their own work on a local workstation.

On the Development server, the programmer will deploy and test the code. This includes testing for run-time, compilation, and logic errors, as well as a review of the code for in-line documentation and efficient programming techniques. The program author will correct any errors and omissions and re-deploy to the Development server. Once errors are corrected, the code is migrated to the Staging platform.

3.2 Peer Review Testing

On the Staging platform, a designated peer reviewer will review and test the program functionality to ensure it meets user requirements and GUI specifications. This reviewer will be a member of the development team, different than the program author. Errors will be reported in the bug tracking software used by the development team. The program author will correct any errors and omissions and re-deploy to the Development and Staging servers. Two types of testing will occur:

- Testing specific program modifications – using a test account with appropriate role assignments, the reviewer will test programs which have been specifically modified.
- Testing program integration – ensure that existing EST functions are not unintentionally affected by program changes. For example, using multiple test accounts, the reviewer will go through the project life cycle testing critical functions used at various project milestones to ensure that the new components of the application do not have un-intended effects on other components.

3.3 User Testing for Major Enhancements

In addition to programmer testing and peer review testing, major enhancements will undergo end-user testing as described in the procedures below.

3.3.1 Test Team

A Test Team will be selected to perform tasks on the application and ensure the programs are working properly. The Test Team will be selected from representative users with various roles and geographic jurisdictions, as appropriate to the enhancement. The team may include members of the ETDM Process development team and steering committee, ETDM Coordinators, ETAT members, Data Entry users, and Community Liaison Coordinators. The Test Team may also include representatives from various FDOT Districts, MPOs, agencies, and consultants.

3.3.2 Test Schedule

A test schedule will be created and distributed to test team members. The test schedule and tasks will vary by enhancement. The following table outlines a typical schedule for testing. The schedule will be finalized when the application changes are free of any known bugs of normal or higher than normal severity.

Date	Task
[*insert date*]	Identify Test Team members
[*insert date*]	Conduct Beta Test Kick-off Training
[*insert date*]	Testing
[*insert date*]	Test Team Submits Error Log

3.3.3 Test Team Packet

Test Team members will be provided the following items to assist with their testing tasks:

- Test Schedule
- Test Instructions
- List of Functions to Test, including test cases
- Error Log Spreadsheet
- Tip Sheets for new users
- Draft User Handbook

Other items may be included, as appropriate. Details about the packet items are provided in the Enhancement Test Plan.

3.3.4 Test Team Instructions

The Test Team performs testing activities on the Staging server. Although the application has been tested internally by the development team, the Test Team should help discover any unforeseen problems or limitations before the application is released to the general user community. The individual Enhancement Test Plan will include testing instructions to be performed by the testers. A sample set of testing instructions is provided in **Section 4.1**.

3.3.5 Test Cases

Test Team members will test application functionality by performing various test cases. The specification for each test case should include the name and description of the function to be tested, user roles with access to the function, and sample projects, queries or notes to use when testing the function. The test cases will be included in the individual Enhancement Test Plan.

3.3.6 Error Reporting

Testers will be provided an Excel spreadsheet to report errors and omissions. The following information will be documented for each error:

- Project # (if applicable)
- Page Title or File Name
- Description of Steps Leading to Error
- Error Type (Crash, hang, privileges, etc.)
- Error message

Testers will submit results to the Help Desk email address. The primary programmer for the enhancement will enter the test results into Bugzilla, and these tasks will be assigned by the application development project manager to the appropriate programmer and prioritized for resolution.

3.4 Usability Test Procedures (New 07/31/2012)

3.4.1 Introduction

The Environmental Screening Tool (EST) is a complex web-based application supporting a wide range of tasks needed for transportation planning project development, and environmental reviews. There is a secure version of the site for FDOT and its partner agencies to provide project review, as well as a public version of the site for all other users. Both versions of the site are a key component of Florida's Efficient Transportation Decision Making (ETDM) Process. The EST is used by hundreds of users for a variety of purposes. As more functionality is added, however, it is becoming more difficult to locate various functions and remember steps needed to perform specific tasks. For new and infrequent users, some parts of the application can be especially confusing. In the summer of 2009, the Department Project Manager initiated discussions with active users to identify improvements to the EST to increase its ease of use. This work group identified some specific enhancements to the EST and several topics requiring further exploration. In order to determine specific recommendations for these other topics like EST Public Site simplification, the EST Development team is conducting usability tests.

In usability tests, representative users try to complete typical tasks on the EST while observers watch, listen and take notes. The EST Development team uses these results to design solutions focusing on the following factors:

- **Ease of learning** – How quickly can a user learn the interface sufficiently well to accomplish basic tasks?
- **Efficiency of use** – How easily can a user accomplish tasks?
- **Memorability** – After attending training and using the site, can users remember enough to use the site effectively the next time or do they have to start over again learning everything anew?
- **Error frequency and severity** – How often do users make errors while using the system, how serious are these errors, and how do users recover from these errors?
- **Subjective satisfaction** – How much does the user *like* using the system?

The EST usability tests are conducted using web-conferencing capabilities available through the Florida Department of Transportation (FDOT). Following the initial series of tests, monthly usability tests will be conducted in order to obtain ongoing feedback from the user community as changes are made to the EST.

This document discusses preparing for, conducting, and using the results of the usability tests. A usability test check list is provided as Attachment C.

3.4.2 Preparing for Usability Tests

3.4.2.1 Determine Test Topic

The EST usability tests cover various subjects on the EST Web Site (both Secure and Public). Tests are conducted using the data and functions available on the EST Stage server. Topics for the first six usability tests were determined as follows:

- Advance Notification Package
- Map Viewer
- Community Characteristics Inventory (CCI) Map Editor
- Project Map Editor
- Infrequent User
- Project Schedule and Tracking

Subsequent topics are identified three to four weeks prior to each test. Topic choices are based on factors such as:

- Critical processes – evaluate the efficiency of tasks essential to the ETDM Process
- Frequent Help Desk requests – examine areas causing the most confusion with users
- Enhancements – receive feedback on designs and development modifications currently underway

3.4.2.2 Identify Participants

Facilitator

One person from the EST development team is assigned the role of facilitator for each usability test. The facilitator is responsible for preparing, conducting, and documenting the results of the test. During the test, the facilitator must remain neutral, stay on task, and keep the user talking. Prior to facilitating, staff must read Chapter 8 in Steven Krug's Rocket Surgery Made Easy (Krug, 2010).

Observers

Members of the development team and other interested stakeholders like Central Environmental Management Office staff (CEMO) observe the usability test to note any problems or areas of concern. They also participate in a debriefing session to identify recommendations, priorities, and next steps. Typically, observers from the development team will be the project manager and programmers who will work on the proposed solutions.

User Participants

Three representative users participate in each test. Users must have an EST account with the permissions necessary to carry out the tasks required for the test topic. The FDOT EST Project Manager selects the users and invites them to participate in the test. Selection as a user is based on the user's role within the EST, frequency of use, and other factors.

3.4.2.3 List Tasks to Test

Approximately three weeks prior to each test, the facilitator develops a bullet list of tasks to cover during the usability test and emails the list to the test observers. The observers review the task list and provide feedback to the facilitator within one week. The task list provides the foundation for the test scenarios.

3.4.2.4 Confirm Session Logistics

Schedule

Usability tests consist of three 50-minute sessions (one for each of the three users), typically scheduled at 9:00, 10:00, and 11:00 am in the morning. This allows for 10 minutes between sessions. Following the last session of the day, the facilitator and observers participate in a debriefing to identify priority issues and recommend a course of action to solve priority problems.

Location

The EST usability tests are conducted as web meetings in order to minimize travel costs. The facilitator needs to be in a room alone. Observers from the CEMO participate in the EMO training room (2nd floor Burns Building at 605 Suwannee Street, Tallahassee, FL), or another designated meeting room. Off-site observers from the EST development team meet in a room at their facilities. Users connect to the web conference using a computer at their location.

Web Conference Connection Information

The FDOT Project Manager reserves the web meeting for the usability tests. The following example shows connection information used for the initial usability tests:

https://www1.gotomeeting.com/join/186606969
Dial 215-383-1005
Access Code: 186-606-969
Meeting ID: 186-606-969

3.4.2.5 Invite Observers and User Participants

After participants are identified for each test, the FDOT Project Manager communicates with the users to confirm their availability. After receiving a confirmation, he sends a meeting notice to the facilitator, observers and user participants to reserve the time on their calendars.

3.4.2.6 Write Scenarios

One week before each test, the facilitator drafts the session scenarios based upon the list tasks to test. A scenario describes a task that the user would typically perform as part of their work in the ETDM Process. The scenario describes what the task should accomplish, but does not tell the user how to complete the task. The number of scenarios per session depends on how long it should take to complete the various tasks.

3.4.2.7 Update Test Script

Reading from a script is highly recommended for usability tests (Krug, 2010). It ensures that instructions cover everything and reduces ambiguity. A sample is provided in Attachment A. The facilitator should adapt the script to the specific test and practice reading it out loud to sound more natural. If not reading from a script, the facilitator prepares a detailed outline of the instructions, agenda, and follow up questions.

3.4.2.8 Check User Accounts on Stage

Tasks on the EST are specific to the user's roles and jurisdiction. For each scenario and user participant, the facilitator makes sure user accounts are set up on Stage correctly. The users may already have an account on Stage or they may need to use one of the test accounts. The facilitator decides which accounts are appropriate, and checks the access on Stage to make sure the account has the correct roles and geographic jurisdiction to complete the scenarios correctly. If the users will log in with their own accounts, the facilitator communicates with them to make sure they know their password on Stage. If not, s/he resets it before the session.

User accounts are not required on the ETDM Public Web Site.

3.4.2.9 Email Handouts

At least one day before the session, the facilitator emails the scenarios to the observers and user participants asking them to have them available for the test.

The facilitator also provides observers with a copy of the *Observer Instructions* (Attachment B).

3.4.3 Conducting Usability Tests

Usability tests consist of approximately three test sessions. Each user participates independently in one session. There are 10-minute breaks between each session. This provides an opportunity to evaluate the results of the previous test and prepare for the next one. As the test is repeated if the users appear to have the same problem or similar problems subsequent tests may be tailored to help better examine items. After completing all of the sessions, the facilitator and observers join in a more detailed debriefing to discuss priority issues and recommend future actions.

The facilitator performs most of the user interaction. During the test, no one should explain how to complete a scenario, or why the EST works that way. The goal is to simplify the use of EST and not train users or explain how the site was developed. The primary job of the EST team is to keep the user talking, and to listen. This allows the test to focus on actual user experience and look for items that might be improved.

It is also important to emphasize to the user that the site is being tested, not them. All of their input is useful and there are no wrong answers.

3.4.3.1 Pre-test Preparation

The facilitator begins setting up 30 minutes before the first session to prepare as follows:

- Turn on the computer and overhead projector (if used)
- Go to the web site and open the pages the user will be testing
- 10 minutes before the first session, log on to GoToMeeting and call the teleconference line. Make sure everything is working properly
- Check the GoToMeeting settings to make sure the session screen and audio can be recorded and note where the recording file will be saved

If something is not working correctly, contact the ETDM Help Desk for assistance

3.4.3.2 Test Agenda

Three users test the EST in separate 50-minute sessions for each usability test topic. Each test session consists of the following elements:

- Welcome (4 minutes)

- Background Questions (3 minutes)
- "Home Page" Tour (3 minutes)
- Scenarios (30 minutes)
- Follow-up (5 minutes)
- Wrap Up (5 minutes)

See the sample script provided in Attachment A for more details about each agenda item.

Allow 10 minutes between each session for a short break to re-group with the observers before the next session starts.

3.4.4 Observing the Usability Tests

Using the same GoToMeeting, members of the EST Development team observe the test to help identify priority problems and recommend solutions to make the site easier to use. During the test, the telephone in the observers' room is muted until the "Follow-up" item on the agenda. At that time, observers may ask the users questions. Observer tasks include the following:

- Take notes, particularly when users are confused or could not complete the task
- Write down questions to ask during the follow-up portion of the session
- After each session, identify the three most serious usability problems
- Participate in the debriefing after the final session

Prior to the test, each observer receives a document containing instructions and space to record the most serious problems identified in each session. (See sample in Attachment B).

3.4.5 Using Results

3.4.5.1 Debriefing

After the Usability Test, the facilitator and observers stay online to participate in a debriefing session. The purpose of the debriefing is to compare notes and make recommendations about what to do next.

The facilitator runs the meeting using the following approach:

1. Introduction – explain how the meeting is going to work
2. Ask everyone to review their list of problems and identify the three they think are the most serious
3. Ask each person to read their three problems
4. Type them in a Word document so that everyone can see the list using GoToMeeting
5. Have an open discussion about which problems seem to be the most serious
6. Discuss potential approaches, level of effort, assignments and timeframes for solving the problems.

The FDOT Project Manager makes the final decision on priorities, schedules, and assignments. The expectation of the debriefing is to provide enough information to help make that decision.

3.4.5.2 Summarizing Results

The facilitator provides a draft summary of the usability test results to the observers and the project technical editor for review. Reviewers provide comments within one week. The facilitator makes appropriate changes to the document, and delivers a final copy to the FDOT Project Manager, Observers, and User Participants. A copy of the report is also stored in the contract folder on the URS server.

3.4.6 References and Additional Resources

Krug, S (2010) Rocket Surgery Made Easy: The Do-It-Yourself Guide to Finding and Fixing Usability Problems. New Riders. CA.

U.S. Department of Health and Human Services. *Usability Testing*. http://www.usability.gov/methods/test_refine/learnusa/index.html. Accessed on 2/23/2010.

The following resources are included to help the facilitator prepare for Usability Testing:

- Attachment A Sample Script
- Attachment B Observer Instructions
- Attachment C Usability Test Check List

3.5 Diagnosis and Correction of any Problems

After receiving the testers' feedback, the development team will diagnose and correct any problems, using Bugzilla to track issues and progress.

3.6 Move to Production

Upon approval of the client's technical project manager, the application will move to production.

Chapter 4 Test Plans (December 2005 – September 2007 (Updated 1/31/2008)

4.1 Beta Test for New Version of EST

This section includes the test plan for the new version of the EST that went into production in December 2005.

Test Team

The Beta Test Team members for the new version of the EST that went into production in December 2005 included the following people:

Bob Crim
George Ballo
Christine Klassen
Xavier Pagan
Gwen Pipkin
Tom Turton
Suraya Teeple
Richard Young
Kathaleen Linger
Gaspar Padron
Brian Yates
Lindy McDowell
George Sirianni
Wendy Lasher
Catherine Owen
Larry Barfield
Steve Love

Beta Test Schedule

The follow table outlines the schedule for Beta testing. The schedule was finalized when development reached 90 percent complete.

Date	Task
July 25, 2005	Identify Test Team members
October 26, 2005	Conduct Beta Test Kick-off Training
October 26- November 2, 2005	Testing
November 2, 2005	Test Team Submits Error Log

Test Team Packet

The following items were provided to the Beta Test Team to assist with their testing tasks:

- Draft User Handbook
- Test Instructions
- List of Functions to Test, including test cases
- Error Log Spreadsheet

Test Team Procedures

The Beta test team performed testing activities on the Staging server. The following instructions were provided:

Testing Instructions

1. Log on to the following site with your EST username and password:

   https://stage.fla-etat.org/etdmgis/

2. Use the project selection tool to select projects within your jurisdiction. Save the search.
3. Use the project selection tool to manually select a project using the ETDM# (try 3394 for now). Save the search.
4. Go through the reports. Select more projects if needed. Projects that have the information to show on the report are listed below in the Test Case section.
5. Test the tools that you commonly use to perform your ETDM tasks.
6. Feel free to add or modify the records in the database. The data from the active, production site has been copied to the Staging platform and is intended to be used for testing purposes. You will not harm the official records or affect current users.
7. Try to break the application. For example, find out what would happen if you submitted ETAT commentary on projects that are outside your jurisdiction.
8. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to help@fla-etat.org.

Test Cases

The Beta Test Team members tested the application functionality by performing various test cases that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and sample projects, queries or notes used when testing the function.

Function	Role	Test Case
Welcome	All	N/A
Project Navigation Bar		
Project List	All	N/A
Saved Searches	All	N/A
History	All	N/A
New Search	All	N/A
Modify Search	All	N/A

Function		Role	Test Case
	Show on Map	All	Any with features
Left Menu			
Tools			
	Maintain Project Diary		
	Add Alternative Description	ETDM Data Entry ETDM Coordinator	New project, or any in jurisdiction not in ETAT review
	Add/Modify Plan Summaries	ETDM Data Entry ETDM Coordinator	Select project in jurisdiction
	Add Project Features to Map	ETDM Data Entry ETDM Coordinator	New project, or any in jurisdiction not in ETAT review
	Assign Project Manager	ETDM Data Entry ETDM Coordinator Project Manager ETDM Management Team	Select project in jurisdiction
	Attach Documents	ETDM Data Entry ETDM Coordinator Project Manager ETDM Management Team	Select project in jurisdiction
	Create New Project Record	ETDM Data Entry ETDM Coordinator	New project
	Extract Project Features from SHS Map	ETDM Data Entry ETDM Coordinator	New project, or any in jurisdiction not in ETAT review
	Identify Required Permits	ETDM Data Entry ETDM Coordinator Project Manager ETDM Management Team	Select project in jurisdiction where phase=programming screen
	Identify Required Technical Studies	ETDM Data Entry ETDM Coordinator Project Manager ETDM Management Team	Select project in jurisdiction where phase=programming screen
	Update Commitments/Responses	ETDM Data Entry ETDM Coordinator Project Manager ETDM Management Team	Select project in jurisdiction
	Update Project Description	ETDM Data Entry ETDM Coordinator	Select project in jurisdiction
	Update Status	ETDM Data Entry ETDM Coordinator	Select project in jurisdiction

Function	Role	Test Case
Update Phase	ETDM Data Entry ETDM Coordinator	Select project in jurisdiction
Update Segment Description	ETDM Data Entry ETDM Coordinator	Select project in jurisdiction
Upload GIS Files	ETDM Data Entry ETDM Coordinator	N/A
Record Results of Project Review		
Describe Direct Effects	ETDM Coordinator ETAT Member	Select project in jurisdiction where status=ETAT Review
Describe Secondary & Cumulative Effects	ETDM Coordinator ETAT Member	Select project in jurisdiction where status=ETAT Review
Class of Action Determination	ETDM Coordinator ETAT Member - Lead Agency	Select project in jurisdiction where status=ETAT Review
Review Purpose & Need Statement	ETDM Coordinator ETAT Member	Select project in jurisdiction where status=ETAT Review
Summarize ETAT Review Screen	ETDM Coordinator	Select project in jurisdiction where status=ETAT Review Complete
Document Public Involvement Activities		
Add/Modify Community Inventory	ETDM Coordinator Community Liaison Coordinator	Select project in jurisdiction
Add/Modify Community Focal Point	ETDM Coordinator Community Liaison Coordinator	Select project in jurisdiction
Record Community-Desired Features	ETDM Coordinator Community Liaison Coordinator	Select project in jurisdiction
Summarize/Modify Public Comments	ETDM Coordinator Community Liaison Coordinator	Select project in jurisdiction
Coordinate ETAT Activities		
Allow Comments after Review Period	ETDM Coordinator	Select project in jurisdiction
Extend ETAT Review Period	ETDM Coordinator	Select project in jurisdiction where status=ETAT Review
Funding Agreement Forms	ETDM Coordinator	N/A
Notify ETAT to Review Projects	ETDM Coordinator	Select project in jurisdiction
Send Email to User Groups	ETDM Coordinator	N/A
Track Dispute Resolution Activities	ETDM Coordinator	
Wizards		
ETAT Review Purpose & Need	ETAT Member	Select project in jurisdiction where

Function		Role	Test Case
			status=ETAT Review
	Create ETDM Project	ETDM Data Entry ETDM Coordinator	New Project
	Update ETDM Project	ETDM Data Entry ETDM Coordinator	Select project in jurisdiction
	Summarize ETAT Review Screen	ETDM Coordinator ETDM Management Team	Select project in jurisdiction where status=ETAT Review
Reports			
	Project Diary		
	Community-Desired Features	All	3394
	Dispute Resolution Activity Log	All	3197
	List of Technical Studies	All	3393
	Project Commitments/Responses	All	3364
	Project Description	All	Any
	Status of GIS Analysis	ETDM Data Entry ETDM Coordinator	
	Transportation Plan Summary Report	All	3254
	Project Effects		
	Agency Comments-Project Effects	All	4972
	Agency Comments-Purpose & Need	All	4972
	Countywide GIS Summary Report	All	N/A
	GIS Analysis Results	All	
	GIS Analysis History	All	
	Screening Summary Report	All	4994
	Reminders		
	Projects Flagged for Dispute	ETDM Coordinator	N/A
	Projects in Dispute Resolution	ETDM Coordinator	N/A
	Projects Awaiting ETDM QA/QC	ETDM Coordinator	N/A
	Un-finalized Summary Reports	ETDM Coordinator	N/A
	Agency Participation		
	Agency Annual Reports	All	N/A
	Agencies and Associated Resource Issues	All	N/A
	Agency Review Report	All	N/A
	Agency Web Sites	All	N/A
	ETAT Contact List	All	N/A
	ETAT Review Status Report	ETDM Coordinator	N/A
	Projects Needing Review	ETDM Coordinator ETAT Member	N/A
Maps			
	View Interactive Maps	All	N/A

Function	Role	Test Case
Edit Map Features	ETDM Data Entry ETDM Coordinator Community Liaison Coordinator	Select project in jurisdiction where status=Editing
Print Hard Copy Maps	All	Any with features
Account Settings		
Change Password	All	N/A
Update Contact Information	All	N/A
Customize My ETDM Page	All	N/A
Manage My Searches List	All	N/A
Manage Bookmarks	All	N/A
Set Default Layers on Maps	All	N/A
Change Notification Settings	All	N/A
Help		
About EST	All	N/A
Contact Us	All	N/A
Frequently Asked Questions	All	N/A
EST Help	All	N/A
ETDM Library	All	N/A
ETDM Meetings and Conferences	All	N/A
Hands-On Training Calendar and Registration	All	N/A
Bottom Navigation Pages		
Project Summary	All	N/A
Participating Agencies	All	N/A
What's New	All	N/A
Contacts	All	N/A
Training	All	N/A
Events	All	N/A
Online Help	All	N/A
FAQ	All	N/A
Change Password	All	N/A
Top Tool Bar		
MyETDM	All	N/A
Project Input	All	N/A
Project Management	All	N/A
ETAT Review	All	N/A
Sociocultural Effects	All	N/A
Log out	All	N/A

Beta Test Error Reporting

Beta Testers were provided an Excel spreadsheet to report errors and omissions. They were asked to document the following information for each error:

- Project # (if applicable)
- Page Title or File Name
- Description of Steps Leading to Error
- Error Type (Crash, hang, privileges, etc.)
- Error message

Beta testers submitted results to the Help Desk email address.

4.2 Enhancements Test Plans (April 2007 – September 2007) (Updated 01/31/2008)

This section includes the test plans for the major enhancements that were developed to the point of user testing during the period from April 1, 2007 through September 30, 2007. Those enhancements are:

- Agency On-line Invoicing
- Public Access
- Performance Management
- Cumulative Effects
- EDMS Integration

Testing for other enhancements/additional functionality is conducted using the error and enhancement tracking software called Bugzilla. The other enhancement/additional functionality developed to the point of user testing during the period from April 1, 2007 through September 30, 2007 are:

- Summary Degree of Effect
- New Screening Summary Report Interface
- My GIS Analysis Results
- Sociocultural Effects Summary Report
- Degree of Effect = Dispute

4.2.1 Agency On-line Invoicing (New 01/31/2008)

Provided below are the list of testers, schedule, description of the Test Team Packet to be provided to testers, and procedure for error reporting for user testing of the Agency On-line Invoicing features on the EST.

List of Testers

The Agency On-line Invoicing testers include the following people:

Name	Phone	Email

Name	Phone	Email
Mary Harger, Invoice Administrator and Invoice Reviewer	850-414-5319	Mary.Harger@dot.state.fl.us
Terri Alexander, Invoice Administrator, Invoice Submitter, and Invoice Reviewer	850-574-3197	Terri_Alexander@urscorp.com
Diane Quigley, Invoice Reviewer	850-414-5327	Diane.Quigley@dot.state.fl.us
Buddy Cunill, Invoice Reviewer	850-414-5280	Buddy.Cunill@dot.state.fl.us

Schedule

The following table outlines the anticipated schedule for user testing of the Agency On-line Invoicing system. The schedule will be adjusted based on feedback from the testers and the level of effort required to resolve identified bugs.

Date	Task
June 2006	Conduct internal development team testing
July 11, 2006	Beta Test Team training on Stage, to be followed by Phase 1 of Beta testing
October 16, 2006	Demonstration of updates to close Phase 1 of Beta testing and move application to Production
December 2006 - April 2007	All paid invoices on current agreements to be entered by Mary Harger and Terri Alexander as test cases to ensure the Invoicing System is working correctly on the Production Server for all agencies and that accounting figures are being calculated correctly.

Test Team Packet

The following materials will be provided to the Agency On-line Invoicing testers:

- Agency On-line Invoicing Training Agenda
- Invoicing Feature Overview hand-out
- Agency On-line Invoicing Handbook

Error Reporting

Testers will report errors and omissions via email. The following information will be documented for each error:

- Feature Tested
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit comments and results to Mary Harger at 850-414-5319 or Mary.Harger@dot.state.fl.us. Mary Harger will coordinate with the application development project manager, who will assign tasks to the appropriate programmer for resolution.

4.2.2 Public Access (New 01/31/2008)

Provided below are the list of testers, schedule, description of the Test Team Packet to be provided to testers, and procedure for error reporting for user testing of the Agency On-line Invoicing features on the EST.

List of Testers

The Test Plan for user testing of the redesigned Public Access Site consists of preliminary testing by the following testers:

- Ruth Roaza – Application Development Project Manager
- Rusty Ennemoser – State Public Involvement Coordinator
- Pete McGilvray – Central Environmental Management Office (CEMO) Technology Resource Manager

The following users will be asked to review and provide feedback on the Summary Report portion of the Public Access Site:

- CEMO staff (to be determined)
- ETDM Coordinators

The following users will then review the site and provide comments:

- Community Liaison Coordinators (CLCs)
- ETDM Coordinators

Schedule

The following table outlines the anticipated schedule for user testing of the Public Access Site. The schedule will be adjusted based on feedback from the testers and the level of effort involved in resolving any identified issues.

Date	Task
September 2007	Conduct internal development team testing
Early October 2007	Initial user testing
Mid October 2007	Testing of Summary Report feature
November 2007	CLC and ETDM Coordinator testing
November 2007	Conduct accessibility evaluation

Test Team Packet

The following instructions will be provided to the testers:

1. Browse to the ETDM Public Access Site at the following address:
   http://etdmpub.fla-etat.org/
2. Test the features under the following menu items:
   - Welcome
   - General Information
   - ETDM Project Diary
   - Project Effects
   - ETDM Maps
3. Record any errors or problems. Email comments and findings to help@fla-etat.org.

Error Reporting

Results of initial user testing will be reported via email, or in some cases directly to the programmer, who will be on-site during the initial testing. Results of subsequent testing (by ETDM Coordinators and CLCs) will be via email. The following information will be documented for each error or omission:

- Feature Tested
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address, as shown above. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

The accessibility evaluation will be conducted using ACCVerify, a software product that is described as the "Content Quality and Accessibility QA System." The software will generate a report detailing how many Public Access Site files pass and how many fail.

4.2.3 Performance Management (New 01/31/2008)

Provided below are the list of testers, schedule, description of the Test Team Packet to be provided to testers, and procedure for error reporting for user testing of the Performance Management features on the EST.

List of Testers

The Performance Management test team members include the following people:

Name	Phone	Email
Stephanie Clemons, Internal Development Team Member	850-414-5334	Stephanie_Clemons@URSCorp.com
Roosevelt Petithomme, User Coordinator	850-402-6317	Roosevelt_Petithommes@URSCorp.com
Diane Quigley, User Management Representative	850-414-5327	Diane.Quigley@dot.state.fl.us
Donald Dankert, Performance Management Team	386-961-7791	Donald.Dankert@dot.state.fl.us
Gwen Pipken, Performance Management Team	863-519-2375	Gwen.Pipkin@dot.state.fl.us
Steve Love, Performance Management Team	813-975-6410	Steve.Love@dot.state.fl.us

Schedule

The following table outlines the anticipated schedule for Performance Management testing. The schedule will be adjusted based on feedback from the testers and the level of effort required to resolve identified bugs.

Date	Task
July 2007	Conduct internal development team testing
August 9, 2007	User coordinator testing, including comparison of results with real data
August 13, 2007	Spot checking to provide user management perspective.
August 17, 2007	Obtain input from Performance Management team based on system demonstrations

August 23, 2007	Testing of surveys by volunteers from Performance Management Work Group

Test Team Packet

The following instructions will be provided to the testers:

1. Log on to the following site with your EST username and password:
   https://stage.fla-etat.org/est
2. Test the features under the following menu items:
   - Tools > Performance Management
   - Reports > Performance Management
3. Record any errors or problems. Email comments and findings to help@fla-etat.org.

Error Reporting

Testers will report errors and omissions via email. The following information will be documented for each error:

- Feature Tested
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address, as shown above. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

4.2.4 Cumulative Effects (New 01/31/2008)

User testing for the Cumulative Effects prototype will be conducted as part of a pilot project involving Indirect and Cumulative Effects (ICE) Work Group participants, following internal testing. Users will receive training as development of the Cumulative Effects features occur, and will then test those features. Provided below are the list of ICE Work Group members, tentative schedule, description of the pilot project test materials, and procedure for error reporting for the Cumulative Effects prototype.

List of Testers

The ICE Work Group members include the following people:

Name	Phone	Email
George Ballo	850-414-5259	george.ballo@dot.state.fl.us
Bob Barron	904-232-2203	robert.b.barron@saj02.usace.army.mil
Josh Boan	850-414-5266	joshua.boan@dot.state.fl.us
Dick Combs	863-519-2808	dick.combs@dot.state.fl.us
Madolyn Dominy	404-562-9644	dominy.madolyn@epa.gov
Gary Donaldson	850-921-3024	gary_donaldson@urscorp.com
Louise Fragala	863-644-0951	louise@pfaplanners.com
Bob Gleason	386-943-5390	bob.gleason@dot.state.fl.us

Name	Phone	Email
Victor Jordan	850-332-7976	jordanv@wfrpc.dst.fl.us
Wendy Lasher	813-281-8309	wglasher@pbsj.com
Steve Love	813-975-6410	steve.love@dot.state.fl.us
Anthony Miller	407-659-4856	amiller@sjrwmd.com
Lauren Milligan	850-245-2170	lauren.milligan@dep.state.fl.us
Catherine Owen	305-470-5399	catherine.owen@dot.state.flu.us
Gwen Pipkin	863-519-2375	gwen_pipkin@dot.state.fl.us
David Rydene	727-824-5379	david.rydene@noaa.gov
Chris Stahl	850-245-2169	chris.stahl@dep.state.fl.us
Pat Webster	386-362-1001	webster_p@srwmd.state.fl.us
John Wrublik	404-679-4072	john_wrublik@fws.gov
Brian Yates	850-245-6372	byates@dos.state.fl.us

Schedule

The following table outlines the anticipated testing schedule for the Cumulative Effects pilot project. The schedule will be adjusted based on feedback from the Work Group as the pilot project proceeds.

Date	Task
June 2007	Conduct internal development team testing
July 2007	User training during Pilot Project Kick-off Meeting
Oct. 17, 2007 Oct. 24, 2007 Oct. 31, 2007 Nov. 15, 2007	Conduct follow-up training via teleconference. Training will consist of walking the testers through the PARA process on-line to refresh them on the tools, and then updating and training users on new tools and enhancements.
November 27 & 28, 2007	ICE Work Group Pilot Final Meeting. Tasks will include: • Use Recommended Process • Discuss Findings • Evaluate Recommended Process

Test Team Packet

The following materials will be provided to the ICE Work Group:

- Cumulative Effects Quick Start Guide
- Cumulative Effects Pilot Project Kick-off Meeting Agenda (which included instructions for prototype testing)

Testing Instructions

Step 1. Initiate Cumulative Effects Evaluation

When does the cumulative effects evaluation occur?

- ETDM Planning Screen
- ETDM Programming Screen
- Pre-screening Option

Step 2. Identify Resources of Concern

Which resources should be evaluated?

- Resources that have been negatively affected by past or present actions
- Resources that may be potentially affected by reasonably foreseeable plans
- Priority resources in declining condition

Step 3. Determine Potentially Affected Resource Area

What is the geographic extent of the study area?

- Natural Resources
  - Management Areas, Basin Boundaries, Habitat Groupings
- Sociocultural Resources
  - Planning Units
- Cultural Resources
  - Historic Districts, Clusters of Cultural Resources

Step 4. Characterize Affected Environment

What is the state of the resource?

- Review and Analyze Data within PARA
  - EST Standard Analyses
  - Previous Direct & Indirect Effects
  - Off-line Resources
- Identify Which Actions May Affect Resources
  - Previously screened ETDM Projects
  - Developments of Regional Impacts
  - Other Transportation Capacity Improvements
  - Land Use Actions in Local Government Comprehensive Plans
- Describe Status of Affected Resources
  - Management Goals and Plans
  - Current Condition of Resources
  - Characterization of Stress Factors

Step 5. Analyze Cumulative Effects

- Describe Effects of Past Transportation and Land Use Actions
- Comment on Potential Effects of Present and Future Actions
- Discuss Results of Off-line Modeling or Trend Analysis, if available
- Document Off-line Sources and Methodology, if used
- Document Recommended Actions to Avoid or Minimize Negative Effects

Step 6. Produce Summary Report

Error Reporting

Issues identified during the pilot project training or subsequent testing will be documented and resolved using Bugzilla. Testers will report errors and omissions via email to the EST Help Desk email address. The following information will be documented for each error:

- Feature Tested
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

4.2.5 EDMS Integration (New 11/30/2007)

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test, to be provided to testers) for the EDMS Integration Test Plan.

List of Testers

The EDMS Integration Test Team is comprised of representative developers with various roles, as appropriate to the enhancement. Test team members include the following people:

Name	Phone	Email
Marcelo Bosio	850-402-6369	Marcelo_Bosio@URSCorp.com
Michael Konikoff	850-402-6338	Michael_Konikoff@URSCorp.com
Sarah Van Wart	423-202-7244	Sarah_Van_Wart@URSCorp.com
Stephanie Clemons	850-414-5334	Stephanie_Clemons@URSCorp.com
Alexis Thomas	352-392-1379	alexis@geoplan.ufl.edu
Christy McCain	352-392-0159	christym@geoplan.ufl.edu
Lance Barbour	352-392-8686	lbarbour@geoplan.ufl.edu
Peter McGilvray	850-414-5330	Peter.McGilvray@dot.state.fl.us
Lance Peterson	850-410-5545	lance.peterson@dot.state.fl.us
Marcus Floyd	850-410-5427	Marcus.Floyd@dot.state.fl.us

Schedule

The following table outlines the anticipated schedule for EDMS Integration testing. The schedule will be finalized when all known bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
August 24, 2007	Identify Test Team members
September 7, 2007	Test ETAT Library, Events Attachments, and Document Attachment Input Forms
September 14, 2007	Test transferring documents to EDMS
September 14, 2007	Test updating DB with the csv file sent by EDMS after processing records transferred
September 17, 2007	Test process to obsolete records to EDMS
September 19, 2007	Test process of Auto-generated Published Documents
September 24, 2007	Test Team Submits Test Results

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Testing procedure for each test case
- Error Log Spreadsheet

Testing Procedure for Each Test Case

Use Case: Test process of Auto-generated Published Documents

1. Run the following SQL statement to verify there are records that need to be auto-generated:

```
SELECT pk_edms_import, fk_blob FROM t_edms_queue
WHERE fk_category IN(123,124,126,127)
AND fk_blob IS NULL
AND tobeImported = 'Y'
AND obsolete = 'N'
```

2. If there are records, write down the values for the PK_EDMS_IMPORT field in the following table

PK_EDMS_IMPORT	FK_BLOB

3. Log on to the following site with your EST username and password:

   https://stage.fla-etat.org/est/edms/procObsQueue.jsp

4. Once the process for Step 3 is done, run the following SQL statement to get the recent blob ids that were generated:

SELECT pk_edms_import, fk_blob FROM t_edms_queue
WHERE fk_blob IN(WRITE HERE ALL PK_EDMS_IMPORT SEPARATED BY COMMAS)

5. Write down the blob ids returned by the query in the table for Step 2.
6. For each blob id generated log on to the following site with your EST username and password to verify the document structure and data:

   https://stage.fla-etat.org/est/servlet/blobViewer?blobID=YYY

   Where YYY is each of the blob Id generated.
7. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet to help@fla-etat.org.

Use Case: Test ETAT Library, Events Attachments and Document Attachment Input Forms

1. Log on to the following site with your EST username and password:
   https://stage.fla-etat.org/est/
2. Test the forms under the following menu items:
   - Tool > Maintain Project Diary > Attach Documents
   - Help > ETDM Library
   - Help > ETDM Meeting and Conferences
3. Feel free to add or modify the records in the database. The data from the active, production site has been copied to the Stage platform and is intended to be used for testing purposes. You will not harm the official records or affect current users.
4. Try to break the application. For example, find out what would happen if you submitted a document but you don't attach the file, or enter bad formatting data.
5. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to help@fla-etat.org.

Use Case: Test process to obsolete records to EDMS

1. Run the following SQL statement to verify that there are obsolete records that need to be synchronized.

   SELECT pk_edms_import, obsolete_reason FROM t_edms_queue
   WHERE obsolete = 'Y'
   AND obsolete_sync = 'N'
2. If there are records, record the values for PK_EDMS_IMPORT and OBSOLETE_REASON fields in the following table:

PK_EDMS_IMPORT	OBSOLETE_REASON

3. Log on to the following site with your EST username and password:

   https://stage.fla-etat.org/est/edms/procObsQueue.jsp
4. Run the following SQL statement to make sure all records were included in the email sent to co-edmsdev@dot.state.fl.us and edms@fla-etat.org:

```
SELECT pk_edms_import, obsolete_reason, obsolete_Sync
FROM t_edms_queue
AND pk_edms_import IN(WRITE HERE ALL PK_EDMS_IMPORT SEPARATED BY COMMAS)
```

5. Make sure all the records found during Step 2 have the value 'Y' in the OBSOLETE_SYNC field.
6. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet to help@fla-etat.org.

Use Case: Test transferring documents to EDMS

1. Run the following SQL statement to find out how many records need to be transferred to EDMS.

```
SELECT COUNT(*) FROM t_edms_queue
WHERE tobeimported = 'Y'
AND obsolete = 'N'
AND fk_blob IS NOT NULL
```

2. Write down the count of records returned during Step 1.

   Number of Records to be Transferred: _______

3. Log on to the following site with your EST username and password:

   https://stage.fla-etat.org/est/edms/procQueue.jsp?run=FTP

4. When the process is completed, run the following SQL statement to make sure all records were transferred:

```
SELECT COUNT(*)
FROM t_edms_queue
WHERE imported_on = 'dd-mmm-yyyy'
```

   Where 'dd-mmm-yyyy' is the date when the test is run.

5. Write down the count of records returned during Step 4.

   Number of Records Transferred: _______

6. Make sure the count of records for Step 2 and 5 are the same.
7. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet to help@fla-etat.org.

Use Case: Test updating DB with the csv file sent by EDMS after processing records transferred

1. Run the following SQL statement to check if all records send to EDMS were processed in the EDMS system. All records should have a DOCNUMBER assigned by the EDMS application:

```
SELECT pk_edms_import, docnumber
FROM t_edms_queue
WHERE imported_on = 'dd-mmm-yyyy'
```

   Where 'dd-mmm-yyyy' is the date when the test is run.

2. Record any discrepancy, errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to help@fla-etat.org.

Error Reporting

Testers will be provided an Excel spreadsheet to report errors and omissions. The following information will be documented for each error:

- Use Case Tested
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

Chapter 5 Enhancements Test Plans (October 2007 – June 2008) (Added 08/29/2008)

This section includes the test plans for the major enhancements that were developed to the point of user testing during the period from October 1, 2007 through June 30, 2008. Those enhancements are:

- AN/Federal Consistency
- Security Enhancements
- Invoicing Enhancements
- Community Characteristics Inventory (CCI) Enhancements

5.1 Advance Notification (AN)/Federal Consistency Review (FCR) Test Plan

The initial user testing for the AN Package and FCR tools and reports will be conducted via a Pilot Test, which will consist of a mock AN Review, Federal Consistency Review, and Federal Consistency Determination. Provided below are the schedule, list of testers, and description of the Test Team Packet for the AN/FCR Pilot Test.

Schedule

The following table outlines the anticipated schedule for AN/FCR Pilot Test. The schedule will be finalized when all priority one bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
March 1, 2008	Identify Test Team members
March 28, 2008	Email Instructions and Tip Sheets
March 31 – April 4, 2008	Testing
April 4, 2008	Test Team Submits Test Results

List of Testers

The AN/FCR Test Team is comprised of representative users with various roles and geographic jurisdictions, as appropriate to the enhancement. These include ETDM Coordinators, the FDEP Clearinghouse Coordinator, AN Commenters, AN Reviewers, ETAT members, and Consistency Reviewers. The test team includes representatives from various FDOT districts, ETAT agencies, and MPOs.

Test team members include the following people:

Name	Role	Email
Gwen Pipkin	FDOT ETDM Coordinator, District 1	gwen.pipkin@dot.state.fl.us
Richard Young	FDOT ETDM Coordinator, District 4	richard.young@dot.state.fl.us
Dan Dankert	FDOT ETDM Coordinator, District 2	donald.dankert@dot.state.fl.us
Lauren Milligan	FDEP ETAT Member and State Clearinghouse Coordinator	lauren.milligan@dep.state.fl.us

Name	Role	Email
Christine Haddock	FDOT CEMO AN Commenter	christine.haddock@dot.state.fl.us
Stephanie Clemons	FDOT CEMO Tester	stephanie.clemons@urscorp.com
Scott Sanders	FFWCC ETAT Member, AN Reviewer, and Consistency Reviewer	scott.sanders@fwc.com
Terry Gilbert	FFWCC ETAT Member, AN Reviewer, and Consistency Reviewer	terry_gilbert@URSCorp.com
James Golden	SFWMD Consistency Reviewer	jgolden@sfwmd.gov
Nichole Gwinnett	SWFRPC AN Commenter, and Consistency Commenter	ngwinnett@swfrpc.org
Karen Kebart	NWFWMD ETAT Member, AN Reviewer, and Consistency Reviewer	Karen.Kebart@nwfwmd.state.fl.us

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Tip Sheets
- Draft User Handbook Sections
- Test Instructions
- List of Functions to Test
- Error Log Spreadsheet

Tip Sheets

Tip Sheets for the AN/FCR Pilot Test will be emailed to the Test Team.

Draft User Handbook

An electronic copy of draft EST Handbook sections pertaining to AN and FCR will be emailed to the Test Team.

Instructions

The instructions to testers will be provided via email, and will consist of the following:

Day 1 – Create Advance Notification Package and Send Project Out for Review – ETDM Coordinators

The Lead Programmer will contact the ETDM Coordinators individually and walk through the creation of the Advance Notification and sending out the Programming Screen project with the new AN attached. This will generate an email to all the reviewers, announcing that the project is ready to be reviewed and that comments can be submitted. Reviewers and Commenters do not do anything on Day 1. You will receive one-on-one instructions on Day 2.

Days 2 and 3 – Conduct AN Review, Conduct Consistency Review, and Submit Comments on AN and Consistency

Reviewers and Commenters will be called individually and walked you through their part. The one-on-one instructions will include:

- Review of Tip Sheets and Error Log
- How to use each tool and/or form that you would use to submit comments
- Record any errors or problems on the Error Log. When you are finished testing, email the Error Log back to help@fla-etat.org.

The review will be closed at midnight on Day 3.

Day 4 – Conduct State Clearinghouse Processing of Comments Received and Submit Federal Consistency Determination

The State Clearinghouse Coordinator will be contacted and receive Web training for the tools and reports used to review comments and record Federal Consistency Determination. The State Clearinghouse Coordinator will then proceed through the Federal Consistency Determination process using the tools and reports and submit the mock Federal Consistency Determination.

Day 5 (or when Federal Consistency Determination is complete) – Create Preliminary Programming Screening Summary Report

Testing of this step will include:

- FDOT ETDM Coordinators will create a preliminary Programming Summary Report.
- All Pilot Test Team members will verify that they got the email notifying them that the Programming Summary Report was completed and published.
- Pilot Test Team members will record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to help@fla-etat.org.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and test cases of sample projects or queries to use when testing the function.

Menu	Sub-category	Function	Role	Test Case
Tools	Maintain Project Diary	Edit Advance Notification Package	ETDM Coordinator	Projects with and without Planning Screen Summary Reports
Account Settings	N/A	Manage Contact Lists	State Clearinghouse Coordinator	Add contacts with and without EST access
Tools	Record Results of Project Review	Submit Federal Consistency Finding	Federal Consistency Reviewer (ETAT) Federal Consistency Reviewer (Not ETAT)	Use projects listed in Projects Needing Review report
Tools	Record Results of Project Review	Comment on Advance Notification Package	Federal Consistency Reviewer (ETAT) ETAT Member (not FC Reviewer) Federal Consistency – Commenting Interested Parties	Use projects listed in Projects Needing Review report
Tools	Record Results of Project Review	Review Purpose and Need Statement	Federal Consistency Reviewer (ETAT) ETAT Member (not FC	Use projects listed in Projects Needing Review report

Menu	Sub-category	Function	Role	Test Case
			Reviewer)	
Tools	Record Results of Project Review	Track State Clearinghouse Projects	State Clearinghouse Coordinator	Use projects listed in Projects Needing Review report
Reports	Agency Participation	Projects Needing Review	State Clearinghouse Coordinator Federal Consistency Reviewer (ETAT) Federal Consistency Reviewer (Not ETAT) ETAT Member (not FC Reviewer) Federal Consistency – Commenting Interested Parties	Projects sent for review after 3/31/2008
Reports	Project Effects	Track State Clearinghouse Projects Report	State Clearinghouse Coordinator ETDM Coordinator Federal Consistency Reviewer (ETAT) Federal Consistency Reviewer (Not ETAT) ETAT Member (not FC Reviewer) Federal Consistency – Commenting Interested Parties	Use projects listed in Projects Needing Review report
Reports	Project Effects	Federal Consistency Findings	State Clearinghouse Coordinator Federal Consistency Reviewer (ETAT) Federal Consistency Reviewer (Not ETAT) ETAT Member (not FC Reviewer) Federal Consistency – Commenting Interested Parties	Use projects listed in Projects Needing Review report
Reports	Project Diary	Advance Notification Package	State Clearinghouse Coordinator ETDM Coordinator Federal Consistency Reviewer (ETAT) Federal Consistency Reviewer (Not ETAT) ETAT Member (not FC Reviewer)	Use projects listed in Projects Needing Review report

Menu	Sub-category	Function	Role	Test Case
			Federal Consistency – Commenting Interested Parties	
Reports	Agency Participation	Projects Needing Federal Consistency Review	Federal Consistency Reviewer (Not ETAT) Federal Consistency – Commenting Interested Parties	Projects sent for review after 3/31/2008

Error Reporting

Testers will report errors and omissions using the Testing Error Log spreadsheet or via email to the EST Help Desk email address.

Instructions included in the Testing Error Log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it is a programming error, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. If you had a project selected, please put the project number in the column, otherwise leave it blank. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," "Authorization." In the "Error message or Description" column, copy any error messages displayed on the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.

The following information will be documented for each error:

- Date
- Project #
- Feature Tested
- Error Type (crash, hang, privileges, etc.)
- Error message or description
- Description of Steps Leading to Error or to Reproduce Error
- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing will be documented and resolved using Bugzilla.

5.2 Security Enhancements

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test, to be provided to testers) for EST Security enhancements.

The security enhancements include:

- Encrypted passwords
- Account Lockout

Schedule

The following table outlines the anticipated schedule for EST Security enhancements testing. The schedule will be finalized when all known bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
2/25/2008	Identify Test Team members
3/3/2008	Testing
3/7/2008	Test Team Submits Test Results

List of Testers

The EST Security enhancements Test Team is comprised of EST technical team representatives who have access to Administrative user accounts and the ability to create test accounts with various roles and geographic jurisdictions. This enhancement should be tested for a random sample of test accounts.

Test team members include the following people:

Stephanie Clemons
Peter McGilvray
Sarah Van Wart

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Test Instructions
- List of Functions to Test, including test cases
- Access to Bugzilla to record test results

Instructions

The testers will follow the steps below to perform testing:

1. Identify or create login information for sample test accounts. Use different account types, such as those having multiple roles or organizational affiliations.
2. Go to the login page of the EST staging application at https://stage.fla-etat.org/est
3. Try to login in to the EST using the sample test accounts. Enter the login information correctly for some attempts, and incorrectly for others. Vary the number and sequence of invalid login attempts, observing warning messages and account lockout.
4. Try using the Forgot Password function to reset password and unlock a locked account.
5. Login using an Administrative account and access the sample accounts with the Manage Users tool. Unlock locked accounts and reset passwords, then try logging in using the unlocked accounts.
6. Try to break the enhancements. For example, supply unexpected data on the login page.

7. Log in to the ETDM database and confirm that the password field data is encrypted.
8. Record any errors or problems in Bugzilla – see section on Error Reporting, below.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and test cases to use when testing the function.

Function	Role	Test Case
Login		
EST login page	Sample	Use login to access the EST or any URLs starting with stage.fla-etat.org. Try failing less than three times before supplying correct login info.
EST login page	Sample	Fail login 3 consecutive times within 15 minutes before attempting to access EST.
Forgot Password? Click here	Sample	Reset password – try before and after lockout
Account Settings		
Change Password	Sample	Attempt to change the current password, looking for side effects
Administrative Tools		
Manage Users	Admin	Use the Reset Password function for user accounts and use new password for login
Manage Users	Admin	Use the Unlock Account function for a locked user account and try logging in with the unlocked account

Error Reporting

Testers have access to Bugzilla to report errors and omissions. The following information will be documented for each error:

- Page Name
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, requirements etc.)
- Error message and/or description

Bugs will be assigned by the application development project manager to the appropriate programmer for resolution.

5.3 Invoicing Enhancements

User testing for the Invoicing Enhancement will be conducted by Mary Harger (Invoice Administrator) and Terri Alexander (Invoice Reviewer). Provided below is contact information for the testers, tentative schedule, description of test materials, and procedure for error reporting.

Schedule

The following table outlines the anticipated testing schedule

Date	Task
3/3 - 3/10/2008	Conduct internal development team testing
3/17/2008	Enhancement becomes available on dev.fla-etat.org for testing by M. Harger and T. Alexander.

List of Testers

The Invoicing testing team members include the following people:

Name	Email
Mary Harger	mary.harger@dot.state.fl.us
Terri Alexander	terri_alexander@urscorp.com

Test Team Packet

The following materials will be provided to the Invoicing Testers.

Spreadsheet of Test Usernames and What They Are Used To Test

Username	Password	What pages can be used to test?			
		Record Invoice Comments	District Review Preference	Assign Hours (Tool)	Hours Assignment (report, generates the schedule A2)
District1Reviewer	changeme	Yes, should see only selected agencies	No	No	No
District2Reviewer	changeme	Yes, should see only selected agencies	No	No	No
usepa_inv	changeme	No	No	Yes	Yes
District1Coord	changeme	No	Yes	No	No
District2Coord	changeme	No	Yes	No	No
mary.harger	changeme	Yes, should see all agencies	No	No	No
terri_alexander	changeme	Yes, should see all agencies	No	No	No

Error Reporting

Testers will report errors and omissions using the Testing Error Log spreadsheet or via email to the EST Help Desk email address.

Instructions included in the Testing Error Log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it is a programming error, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. If you had a project selected, please put the project number in the column, otherwise leave it blank. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," "Authorization." In the "Error message or Description" column, copy any error messages displayed on

the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.

The following information will be documented for each error:

- Date
- Project #
- Feature Tested
- Error Type (crash, hang, privileges, etc.)
- Error message or description
- Description of Steps Leading to Error or to Reproduce Error
- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing will be documented and resolved using Bugzilla.

5.4 Community Characteristics Inventory (CCI) Enhancements

Testing for the CCI Enhancement will be conducted by Ruth Roaza, Michael Konikoff and Chris Sands. Additional user testing for the CCI digitizing tools will be conducted as part of the testing for the Integrated Map Viewer.

List of Testers

The CCI testing team members include the following people:

Name	Email
Ruth Roaza	Ruth_Roaza@urscorp.com
Michael Konikoff	michael_konikoff@urscorp.com
Chris Sands	Chris_Sands@URSCorp.com

Schedule

The following table outlines the anticipated testing schedule.

Date	Task
4/11/2008	CCI Digitizing Demo
4/15/2008	CCI ready for testing on Stage

Test Team Packet

The Test Team Packet for the CCI Enhancement testers will consist of testing instructions to be provided during the on-line CCI demonstration.

Demonstration of the CCI Digitizing Functionality

A demonstration of the CCI drawing and digitizing process will go over all of the major digitizing functionality, tracing the process from a draft drawing (stored as points) to a finalized drawing (saved as an ESRI Shape), to a community that has editable attributes after running analysis.

Testing Instructions

The testers will follow the steps below to perform testing:

Log on to the EST and Open Map

1. Open Map using menu link Maps>>Edit Map Features>>Community Input.
2. Open Map using menu link Maps>>Integrated Map.
3. Click Edit Menu to open Edit Tab.
4. Click Community Characteristics Inventory link.

Create Community

1. Click Create Community link.
2. Click Start Drawing button.
3. Draw boundaries of community on map.
4. Click map toolbar button to complete community polygon and save.
5. Complete form for community name, history, goals and values.
6. Click Save Draft Geometry button.
7. Click Finalize Geometry button.
8. Click Run Analysis button.
9. Click Exit Community Edit Mode link.

Verify and Update Community Analysis

1. Wait for analysis queue to run analysis.
2. Open Reports>>Public Involvement>>Community Characteristics Inventory Report.
3. Select Community from community selection form. Click Load Community button.
4. View analysis data.
5. Open Tools>>Document Public Involvement Activities>>Edit Community.
6. Select Community from community selection form. .Click Load Community button.
7. Modify data as desired.
8. Click Save button.
9. Reopen form to see that edited data are saved and that original data are still available.

Edit Community

Steps 1-3 as above (under Log in and Open Map), and then:

4. Click Edit Community link.
5. Popup appears prompting to clear drawing and zoom to selected polygon. Click OK.
6. Map zooms to default community (23rd Street Community).

7. Select desired community from dropdown list in Edit table.
8. Popup appears prompting to clear drawing and zoom to selected polygon. Click OK.
9. Map zooms to desired community.
10. Click map toolbar button to remove points.
11. Click map toolbar button to add points and draw new points on the map.
12. Click map toolbar button to complete community polygon and save.
13. Click Save Draft Geometry button.
14. Click Finalize Geometry button.
15. Click Run Analysis button.
16. Click Exit Community Edit Mode link.

Edit Community Attributes

Steps 1-3 as above (under Log in and Open Map), and then:

4. Click Edit Community Attributes link.
5. Same form opens as Tools>>Document Public Involvement Activities>>Edit Community.

Error Reporting

Testers will report errors and omissions using the Testing Error Log spreadsheet or via email to the EST Help Desk email address.

Instructions included in the Testing Error Log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it is a programming error, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. If you had a project selected, please put the project number in the column, otherwise leave it blank. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," "Authorization." In the "Error message or Description" column, copy any error messages displayed on the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.

The following information will be documented for each error:

- Date
- Project #
- Feature Tested
- Error Type (crash, hang, privileges, etc.)
- Error message or description
- Description of Steps Leading to Error or to Reproduce Error
- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing will be documented and resolved using Bugzilla.

Chapter 6 Enhancements Test Plans (July 2008 – December 2008) (Added 7/31/2009)

This section includes the test plans for the major enhancements that were developed to the point of user testing during the period from July 1, 2008 through December 31, 2008. Those enhancements are:

- Integrated Map Viewer
- QA Reports
- Project Tracker

6.1 Integrated Map Viewer Test Plan

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test, to be provided to testers) for the Integrated Map Viewer enhancements.

The EST Integrated Map enhancement combines the following EST functions into one map application:

- Interactive Map Viewer
- Project Input Map Editor
- Community Characteristics Inventory Map Editor

This is the Test Plan for the basic interactive map viewer only. The Map Editor enhancements are documented separately.

Schedule

The following table outlines the anticipated schedule for Integrated Map Viewer enhancements testing. The schedule will be finalized when all known bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
8/29/2008	Identify Test Team members
9/5/2008	E-mail instructions and tip sheets
9/8/2008	Testing
9/9/2008	Test Team Submits Test Results

List of Testers

The Integrated Map Viewer Test Team is comprised of EST technical team representatives who have access to Administrative user accounts and the ability to create test accounts with various roles and geographic jurisdictions. This enhancement should be tested for a random sample of test accounts.

Test team members include the following people:

GeoPlan staff TBD
Stephanie Clemons
Peter McGilvray
Ruth Roaza

Sarah Van Wart

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Test Instructions
- List of Functions to Test, including test cases
- Error Log Spreadsheet

Instructions

The testers will follow the steps below to perform testing:

1. Identify or create login information for sample test accounts. Use different account types, such as those having multiple roles or organizational affiliations, and with or without draft project access.
2. Log in to the EST staging application at https://stage.fla-etat.org/est
3. Open the map viewer and use all the available functions in any order, and following typical EST workflows.
4. Try to break the enhancements. For example, supply unexpected data on the Search tab.
5. Log in to the ETDM database and confirm that the password field data is encrypted.
6. Record any errors or problems in Bugzilla – see section on Error Reporting, below

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and test cases to use when testing the function.

Function	Role	Test Case
Maps		
Integrated Map Viewer	Sample	Open the viewer from the left-hand menu. Try this more than once during the same session.
Project Search Bar		
Show on Map	Sample	Attempt to change the current password, looking for side effects.
Main Page		
Show / Hide Map bar	Sample	Use the Reset Password function for user accounts and use new password for login.
Integrated Map Viewer		
Basic Navigation Tools	Sample	Zoom in, zoom out, pan, return to previous/next extent, zoom to scale or with zoom slider.
Search	Sample	Try all search tools in the Search tab. Repeat in any order.
Analyze	Sample	Try all search tools in the Search tab. Repeat in any order.

Function	Role	Test Case
Edit	Sample with/without draft access	Verify that tab is not present for users without draft access. The Edit tab functions will be tested separately. Try ETAT Member vs. Data Entry, for example.
Print	Sample	Create various print layouts
Help	Sample with/without draft access	Edit tool icons should display for users with draft access only. All other icons should be displayed for all users. Try ETAT Member vs. Data Entry, for example.
Legend	Sample	Use different map services in the same session and open the legend.
Layers	Sample	Use different map services in the same session. Save and restore layer configurations. Refresh map automatically and manually. Open metadata for layers. Turn layers on and off at different scales.
GUI	Sample	Minimize, maximize, and resize the map window and components.
Response Time	Sample	GeoPlan staff will participate in multi-user load testing for concurrent sessions.

Error Reporting

Testers will use an error log spreadsheet to report errors and omissions. The spreadsheet will be provided in the Test Team packet.

Instructions included in the error log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it's programming errors, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. If you had a project selected, please put the project number in the column, otherwise leave it blank. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," or "Authorization." In the "Error message or Description column, copy any error messages displayed on the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.

The following information will be documented for each error:

- Date
- Project #
- Feature Tested
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, requirements, etc.)
- Error message and/or description

- Description of Steps Leading to Error or to Reproduce Error
- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing, and their resolutions will be documented using Bugzilla.

6.2 QA Reports

The user testing for the Quality Assurance (QA) reports will be conducted on the Production Server because of consistency and integrity of data. The user testing will consist of running the report for each District and verify that the outputs of quantities are correct. Provided below are the schedule, list of testers, and description of the Test Team Packet for the QA Reports user testing.

Schedule

The following table outlines the anticipated schedule for QA Report User Test. The schedule will be finalized when all priority one bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
September 1, 2008	Identify Test Team members
September 15, 2008	Email Instructions and Tip Sheets
September 29 – October 24, 2008	Testing
September 29 – October 24, 2008	Test Team Submits Test Results

List of Testers

The Test Team is comprised of representative users with various roles and geographic jurisdictions, as appropriate to the enhancement. These include ETDM Coordinator, FDOT Clearinghouse Coordinator, EMO Manager, and ETDM Coordinator Management Team. The test team includes representatives with roles and jurisdictions from various FDOT districts.

Test team members include the following people:

Name	Role	Email
Peter McGilvray	FDOT ETDM Coordinator	peter.mcgilvray@dot.state.fl.us
Ruth Roaza	FDOT Community Liaison Coordinator	ruth_roaza@urscorp.com

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Draft User Handbook Sections pertaining to QA reports
- List of Functions to Test
- Error Log Spreadsheet

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and test cases of sample projects or queries to use when testing the function.

Menu	Sub-category	Function	Role	Test Case
Report	Performance Management > Quality Assurance Review	Class of Action Quality Assurance Report	ETDM Coordinators, FDOT Clearinghouse Coordinator, EMO Manager, and ETDM Coordinator Management Team	All FDOT Districts for year 2007
Report	Performance Management > Quality Assurance Review	Integrated Performance Management QA Report	ETDM Coordinators, FDOT Clearinghouse Coordinator, EMO Manager, and ETDM Coordinator Management Team	All FDOT Districts for year 2007
Report	Performance Management > Quality Assurance Review	Summary of Public Comments Status Report	ETDM Coordinators, FDOT Clearinghouse Coordinator, EMO Manager, and ETDM Coordinator Management Team	All FDOT Districts for year 2007
Report	Performance Management > Quality Assurance Review	Summary Report Status by Planning Org Report	ETDM Coordinators, FDOT Clearinghouse Coordinator, EMO Manager, and ETDM Coordinator Management Team	All FDOT Districts for year 2007

Error Reporting

Testers will report errors and omissions using the Testing Error Log spreadsheet or via email to the EST Help Desk email address.

Instructions included in the Testing Error Log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it is a programming error, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," or "Authorization." In the "Error message or Description" column, copy any error messages displayed on the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.

The following information will be documented for each error:

- Date
- FDOT District #
- Feature Tested
- Error Type (crash, hang, privileges, etc.)
- Error message or description
- Description of Steps Leading to Error or to Reproduce Error

- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing, and their resolutions will be documented using Bugzilla.

6.3 Project Tracker

The user testing for the Project Tracker tools and reports will be conducted on Stage. For Project Tracker tools, the user testing will consist of running the tools, entering data, saving data, and making sure the data are saved properly. For Project Tracker reports, the user testing will consist of generating the reports and making sure the data are consistent with the saved date.

Schedule

The following table outlines the anticipated schedule for Project Tracker User Test. The schedule will be finalized when all priority one bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
December 21, 2008	Identify Test Team members
January 12, 2009	Email Instructions and Tip Sheets
January 19, 2009 – January 23, 2009	Testing
January 26, 2009	Test Team Submits Test Results

List of Testers

The Test Team is comprised of representative users with various roles and geographic jurisdictions, as appropriate to the enhancement. These include EMO Manager, FDOT ETDM Coordinator Primary, FDOT ETDM Coordinator, ETDM Coordinator Management Team, MPO ETDM Coordinator Primary, MPO ETDM Coordinator, and Project Manager. The test team includes representatives with roles and jurisdiction from various FDOT Districts.

Test team members include the following people:

Name	Role	Email
Peter McGilvray	FDOT ETDM Coordinator	peter.mcgilvray@dot.state.fl.us
Ruth Roaza	FDOT Community Liaison Coordinator	ruth_roaza@urscorp.com

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Draft User Handbook Sections pertaining to Project Tracker tools and reports
- List of Functions to Test
- Error Log Spreadsheet

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and test cases of sample projects or queries to use when testing the function.

Menu	Sub-category	Function	Role	Test Case
Tools	Maintain Project Diary > Project Tracker	Manage Project Tasks	FDOT ETDM Coordinator Primary, FDOT ETDM Coordinator, ETDM Coordinator Management Team, MPO ETDM Coordinator Primary, MPO ETDM Coordinator, and Project Manager	Any project under the user's jurisdiction
Tools	Performance Management > Quality Assurance Review	Manage Task Groups	FDOT ETDM Coordinator Primary, FDOT ETDM Coordinator, ETDM Coordinator Management Team, MPO ETDM Coordinator Primary, MPO ETDM Coordinator, and Project Manager	There is no required project selection for this tool.
Tools	Performance Management > Quality Assurance Review	Record Average District Project Costs and Times	FDOT ETDM Coordinator Primary, FDOT ETDM Coordinator, ETDM Coordinator Management Team, MPO ETDM Coordinator Primary, MPO ETDM Coordinator, and Project Manager	Those districts under user's jurisdiction
Tools	Performance Management > Quality Assurance Review	Track Projects	EMO Manager, FDOT ETDM Coordinator Primary, FDOT ETDM Coordinator, ETDM Coordinator Management Team, MPO ETDM Coordinator Primary, MPO ETDM Coordinator, and Project Manager	Any project selection under user's jurisdiction and outside of user's jurisdiction.
Reports	Project Diary > Project Tracker	Average District Project Costs and Times	All roles available in EST	Any of the FDOT District
Reports	Project Diary > Project Tracker	Project Tasks Status Report	All roles available in EST	Any project selection under user's jurisdiction and outside of user's jurisdiction.
Reports	Project Diary > Project Tracker	Task Groups Report	All roles available in EST	Any project selection under user's jurisdiction and outside of user's jurisdiction.

Error Reporting

Testers will report errors and omissions using the Testing Error Log spreadsheet or via email to the EST Help Desk email address.

Instructions included in the Testing Error Log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it is a programming error, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," "Authorization." In the "Error message or Description" column, copy any error messages displayed on the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.
>
> The following information will be documented for each error:

- Date
- FDOT District #
- Feature Tested
- Error Type (crash, hang, privileges, etc.)
- Error message or description
- Description of Steps Leading to Error or to Reproduce Error
- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing, and their resolutions will be documented using Bugzilla.

Chapter 7 Enhancements Test Plans (January 2009 – December 2009) (Added 7/31/2010)

This section includes the test plans for the major enhancements that were developed to the point of user testing during the period from January 1, 2009 through December 31, 2009. Those enhancements are:

- Document Review
- SCE Participation Report

7.1 Document Review

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test, to be provided to testers) for the Document Review Module.

Schedule

The following table outlines the anticipated schedule for Document Review Module testing. The schedule will be finalized when all known bugs are resolved that are directly related to the enhancement and have normal or higher than normal severity.

Date	Task
06/08/2009	Identify Test Team members
07/01/2009	Conduct Test Kick-off Training
07/01/2009 – 07/08/2009	Testing
07/08/2009	Test Team Submits Test Results

List of Testers

The Document Review Module Test Team is comprised of representative users with various roles and responsibilities. These include Document Review Administrators, Commenters, Staff, and Responders.

Test team members include the following people:

Name	Role	Email
Peter McGilvray	All	Peter.McGilvray@dot.state.fl.us
Christine Haddock	All	Christine.Haddock@dot.state.fl.us
Chris Sands	All	Chris_Sands@URSCorp.com
Stephanie Clemons	All	Stephanie_Clemons@URSCorp.com

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Tip Sheets for new users

- Draft User Handbook
- Test Instructions
- List of Functions to Test, including test cases
- Error Log Spreadsheet

Tip Sheets

Provide hardcopy, electronic copy, or instructions on how to access Tip Sheets for new users found in the EST Library.

Draft User Handbook

Provide hardcopy, electronic copy, or instructions on how to access the Draft User Handbook.

Instructions

The testers will follow the steps below to perform testing:

Log on to the following site with your EST username and password:
https://new-stage.fla-etat.org/est

1. Test the functions listed in the Test Cases table.
2. Feel free to add or modify the records in the database. The data on the Stage platform is intended to be used for testing purposes. You will not harm the official records on the production EST or affect current users.
3. Try to break the application. For example, find out what would happen if you tried to submit a comment on a document you were not assigned to review.
4. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to help@fla-etat.org.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions and the user roles with access to each function.

Function	Role	Test Case
Tools > Document Review		
Set Up Document Review	Document Review Administrator	Set up a document review event and assign users who have only Document Review roles and users who don't.
Review Document	Document Review Commenter and Staff	Use the link from the e-mail notification sent by Document Review Administrator.
Respond to Document Reviews	Document Review Responder	Respond to Document Reviews once review event is complete.
Reports > Document Review		
Document Reviews and Responses	All	View both the PDF and Excel versions of the report.

Error Reporting

Testers will be provided an Excel spreadsheet to report errors and omissions. The following information will be documented for each error:

- Request # (if applicable)
- Page Title or File Name
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

7.2 SCE Participation Report

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test, to be provided to testers) for the SCE Evaluation Participation Report.

Schedule

The following table outlines the anticipated schedule for SCE Evaluation Participation Report User Test. The schedule will be finalized when all priority one bugs that are directly related to the enhancement and have normal or higher than normal severity are resolved.

Date	Task
March 15, 2010	Identify Test Team members
March 22, 2010	Email Instructions and Tip Sheets
March 29 – April 2, 2010	Testing
March 29 – April 2, 2010	Test Team Submits Test Results

List of Testers

The Test Team is comprised of representative users with various roles and geographic jurisdictions, as appropriate to the enhancement. These include EMO Manager and Admin.

Test team members include the following people:

Name	Role	Email
George Ballo	EMO Manager	george.ballo@dot.state.fl.us
Ruth Roaza	Admin	ruth_roaza@urscorp.com

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Testing Instructions
- List of Situations to Test
- Error Log Spreadsheet

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions, the user roles with access to each function, and test cases of sample projects or queries to use when testing the function.

Menu	Sub-category	Function	Role	Test Case
Report	Performance Management > Performance Monitoring >	SCE Evaluation Participation Report	ADMIN, CEMO Manager	Various ETDM phases, planning organizations, and date ranges

Error Reporting

Testers will report errors and omissions using the Testing Error Log spreadsheet or via email to the EST Help Desk email address.

Instructions included in the Testing Error Log spreadsheet are as follows:

> Please log onto the EST testing server and test the functions that you use to perform your ETDM tasks. Should you encounter any problems, please describe them in the log below. Please report any problems, whether it is a programming error, formatting, how the function works, or the instructions to use it. We need your feedback and appreciate your comments. Use a separate row for each problem. Use the "Error Type" for a general category of error; for example, "Format," "Program Bug," or "Authorization." In the "Error message or Description" column, copy any error messages displayed on the computer or describe what happened. In "Steps to reproduce the issue," describe what you did before the error occurred. The more detail you can provide, the easier it will be to replicate the problem and fix it. In the "Reproducible?" column, put "Yes" if the error occurred all the time or some of the time, or "No" if it only happened once.

The following information will be documented for each error:

- Date
- FDOT District #
- Feature Tested
- Error Type (crash, hang, privileges, etc.)
- Error message or description
- Description of Steps Leading to Error or to Reproduce Error
- Reproducible?

Tasks for error fixes will be assigned by the application development project manager to the appropriate programmer for resolution. Issues identified during the testing, and their resolutions will be documented using Bugzilla.

Chapter 8 Enhancements Test Plans (January 2010 – August 2011) (New 7/31/2012)

This section includes the test plans for the major enhancements that were developed to the point of user testing during the period from January 1, 2010 through August 31, 2011. Those enhancements are:

- **Map Editor Tools**
- **Map Viewer User Interface**
- **ETDM Calendar Enhancements**
- **GIS Analysis Results Report Enhancements (Feature Level)**
- **Performance Management Report Enhancements**

8.1 Map Editor Tools

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test) to be provided to testers for the Map Editor Tools.

Schedule

The following table outlines the anticipated schedule for Map Editor Tools testing. The schedule will be finalized when all known bugs are resolved that are directly related to the enhancement and have normal or higher than normal severity.

Date	Task
7/7/2011	GoTo Meeting to provide testing instructions to testers
7/11/2011 – 7/22/2011	User Testing Period
8/17/2011	System Stress Test by GeoPlan Staff

List of Testers

The Map Editor Tools Test Team is comprised of representative users with various roles and responsibilities. Test Team members include the following people:

Name	Role
Jessica Paul	ETDM Coordinator Team/CLC
Kathaleen Linger	ETDM Coordinator Team/CLC
Lauren Brooks	ETDM Coordinator Team/CLC
Megan McKinney	ETDM Coordinator Team/CLC
Shandra Davis	ETDM Coordinator Team
Wendy Lasher	ETDM Coordinator Team/CLC
Alexis Thomas	Coordinated GeoPlan staff stress test

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Tip Sheets for new users
- Test Instructions
- List of Functions to Test, including test cases
- Error Log Spreadsheet

Tip Sheets

Provide hardcopy, electronic copy, or instructions on how to access Tip Sheets for new users found in the EST Library.

Instructions

The testers will follow the steps below to perform testing:

1. Log on to the following site with your EST username and the temporary password, **changeme**:

   https://new-stage.fla-etat.org/est

2. Create a project in your jurisdiction using the **Create New Project Record** form, located in the EST main menu on the left side of the main EST screen. To access the form, go to **Tools**>**Project Diary**>**Create New Project**.
3. Open the **Map Viewer** using the **Map it** button.
4. Use the map navigation tools on the map menu bar to zoom to the project location.
5. To edit your project features, do the following:
   a. Click the **Tools** link on the map menu bar to display the map tools.
   b. Under **Edit Map Features**, click the **Transportation Projects** icon. The **Edit Project** form opens, allowing you to edit your project features.
6. Test all of the available functions on the **Edit Project Features** tool. Refer to the tip sheet for instructions.
7. After completing your test cases, log off, and then log on again to make sure you can find your project on the map and in the reports.
8. Try to break the application. For example, find out what would happen if you tried to edit map features on a project that is not in your jurisdiction.
9. In the first release of the map editor, only segment editing will be enabled. Later in the testing period we will ask you to try different types of features (i.e., points and polygons).
10. Try logging off and back on, editing the project you just entered and adding another one.
11. Try creating projects with different complexity (i.e., multiple alternatives, multiple features within an alternative, interchanges, etc.).
12. Try editing a project that already has features. Try changing the shape of existing segments.

13. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to **help@fla-etat.org**.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions and the user roles with access to each function.

Function	Test Case
Create a project	
Create point, polygon, and segment features for projects	After you have created your project, open the map viewer to begin creating points, polygons, and segment work.
Edit point, polygon and segment features for projects	Once you have created and saved a digitized project, open the map viewer to edit your newly created points, polygons and segment work.
Extracting and digitizing features from the basemap*	Attempt to create line work using the extract tool provided in the map editor.
View project features and information	Identify the project on the map and view the project description report.

This feature will be available during week two of testing.

Error Reporting

There will be two options for reporting errors:

Option one: Users will be provided an Excel spreadsheet to report errors and problems using the Editing tools. The spreadsheet will be set up to collect the following information:

- Test Environment (IE7 or IE8): List which version of Internet Explorer (IE) you are using. This can be determined by opening your browser, selecting **Help** from the menu, then selecting **About Internet Explorer**.
- Screen Resolution: Right-click on your desktop, select **Properties**, open the **Setting** tab and look for **screen resolution**.
- For each error, provide the following:
  - Description of error or problem encountered
  - Description of steps leading to error (List as many specifics as you can on what you were doing when the error occurred. See example in spreadsheet)
  - Error message (If an error message has been displayed on the screen, please copy the full text of the message into this column.)
- Map Editor Comments – On the second tab of the spreadsheet is an area to provide general comments on the usability of the editing tools.

Email the spreadsheet to the EST Help Desk when you are finished with an editing session.

Option two: Users may provide immediate feedback using the **Map Feedback** tool, which can be launched via the icon located on the far right of the map menu bar. Users will be asked to provide the same information requested in the spreadsheet (i.e., description of error or problem, steps leading to the error, error message, browser version, etc.)

For example: *I started editing project #1234 by clicking the Edit Transportation Project button. The "Editing Project #1234" form appeared, and I clicked the check box next to Segments to hide all segments. An error* *message appeared in the upper right corner of the screen stating, "Invalid Response from Server"… I am using IE8 and my screen resolution is set to 1280x800.*Testers will submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

8.2 Map Viewer User Interface

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test) to be provided to testers for the Map Viewer User Interface.

Schedule

The following table outlines the anticipated schedule for Map Viewer User Interface testing. The schedule will be finalized when all known bugs are resolved that are directly related to the enhancement and have normal or higher than normal severity.

Date	Task
4/13/2011	Testing to begin on Stage
4/29/2011	End of testing period

List of Testers

The Map Viewer User Interface Test Team is comprised of several of the frequent EST users who accept invitations to the demonstrations provided at the ongoing EST Dev Team Meetings. Test Team members include the following people:

Name	Role	Email
Lauren Brooks	ETDM Coordinator Team/CLC	lauren.brooks@urs.com
Wendy Lasher	ETDM Coordinator Team/CLC	wendy.lasher@atkinsglobal.com
Kathaleen Linger	ETDM Coordinator Team/CLC	kathaleen.linger@dot.state.fl.us
Megan McKinney	ETDM Coordinator Team/CLC	megan.mckinney@urs.com

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Tip Sheets for new users
- List of Functions to Test, including test cases
- Error Log Spreadsheet

Tip Sheets

Provide hardcopy, electronic copy, or instructions on how to access Tip Sheets for new users found in the EST Library.

Instructions

The testers will follow the steps below to perform testing:

1. Log on to the following site with your EST username and password: https://new-stage.fla-etat.org/est
2. Test the functions in the new map viewer interface
3. Try to break the application. For example, find out what would happen if you tried to submit a comment on a document you were not assigned to review.
4. Email errors or problems to help@fla-etat.org.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions and the user roles with access to each function.

Function	Role	Test Case
Map Viewer		
	All users	Use the map viewer as you would typically use it to accomplish your work

Error Reporting

Testers will be asked to submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

8.3 ETDM Calendar Enhancements

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test) to be provided to testers for the ETDM Calendar Enhancements.

Schedule

The following table outlines the anticipated schedule for ETDM Calendar Enhancements testing. The schedule will be finalized when all known bugs are resolved that are directly related to the enhancement and have normal or higher than normal severity.

Date	Task
4/8/2011	Test the Calendar

List of Testers

The ETDM Calendar Enhancements Test Team is comprised of representative users with various roles and responsibilities. Test team members include the following people:

Name	Role	Email
Peter McGilvray	CEMO Manager	Peter.mcgilvray@dot.state.fl.us
Matthew Muller	CEMO Manager	Matthew.muller@dot.state.fl.us

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Tip Sheets for new users

Tip Sheets

Provide hardcopy, electronic copy, or instructions on how to access Tip Sheets for new users found in the EST Library.

Instructions

The testers will follow the steps below to perform testing:

1. Log on to the following site with your EST username and password: https://new-stage.fla-etat.org/est.
2. Test the calendar functions.
3. Feel free to add or modify the records in the database. The data on the Stage platform is intended to be used for testing purposes. You will not harm the official records on the production EST or affect current users.
4. Try to break the application. For example, find out what would happen if you tried to submit a comment on a document you were not assigned to review.
5. Record any errors or problems and email results to help@fla-etat.org.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions and the user roles with access to each function.

Function	Role	Test Case
ETDM Calendar		
	CEMO Manager	Add and delete events on the calendar

Error Reporting

Testers will be asked to report errors and omissions. The following information will be documented for each error:

- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

8.4 GIS Analysis Results Report Enhancements (Feature Level)

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test) to be provided to testers for the GIS Analysis Results Report Enhancements (Feature Level).

Schedule

The following table outlines the anticipated schedule for GIS Analysis Results Report Enhancements (Feature Level) testing. The schedule will be finalized when all known bugs are resolved that are directly related to the enhancement and have normal or higher than normal severity.

Date	Task
3/25/2011	Test the report

List of Testers

The GIS Analysis Results Report Enhancements (Feature Level) Test Team is comprised of representative users with various roles and responsibilities. Test team members include the following people:

Name	Role	Email
Lauren Brooks	ETDM Coordinator Team/CLC	lauren.brooks@urs.com
Wendy Lasher	ETDM Coordinator Team/CLC	wendy.lasher@atkinsglobal.com
Kathaleen Linger	ETDM Coordinator Team/CLC	kathaleen.linger@dot.state.fl.us
Megan McKinney	ETDM Coordinator Team/CLC	megan.mckinney@urs.com

Test Team Packet

Reference Documents

The following reference documents will be provided to the testers:

- Tip Sheets for new users

Tip Sheets

Provide hardcopy, electronic copy, or instructions on how to access Tip Sheets for new users found in the EST Library.

Instructions

The testers will follow the steps below to perform testing:

1. Log on to the following site with your EST username and password: https://new-stage.fla-etat.org/est.
2. View GIS Results in GIS Analysis Results Report. Be sure to look at projects with and without multiple alternatives and features.
3. Try to break the application. For example, find out what would happen if you tried to submit a comment on a document you were not assigned to review.
4. Email any errors or problems to help@fla-etat.org.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions and the user roles with access to each function.

Function	Role	Test Case
Reports		
Project Effects>GIS Analysis Results	All users	View GIS Results in GIS Analysis Results Report. Be sure to look at projects with and without multiple alternatives and features

Error Reporting

Testers will report errors and omissions to the Help Desk. The following information will be documented for each error:

- Request # (if applicable)
- Page Title or File Name
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

8.5 Performance Management Report Enhancements

Provided below are the schedule, list of testers, and description of the Test Team Packet (list of reference documents, testing instructions, and test cases, including list of functions to test) to be provided to testers for the Performance Management Report Enhancements.

Schedule

The following table outlines the anticipated schedule for Performance Management Report Enhancements testing. The schedule will be finalized when all known bugs are resolved that are directly related to the enhancement and have normal or higher than normal severity.

Date	Task
3/1/2010 – 3/31/2010	Run survey results and check calculations presented on reports

List of Testers

The Performance Management Report Enhancements Test Team is comprised of representative users with various roles and responsibilities. Test team members include the following people:

Name	Role	Email
Drew Dietrich	CEMO Manager	Drew_dietrich@urscorp.com
Stephanie Clemons	CEMO Manager	Stephanie_clemons@urscorp.com

Name	Role	Email
Ruth Roaza	CEMO Manager	Ruth_roaza@urscorp.com
Thu Clark	CEMO Manager	Thu-huong.clark@dot.state.fl.us

Test Team Packet

Instructions

The testers will follow the steps below to perform testing:

1. Log on to the following site with your EST username and password: https://new-stage.fla-etat.org/est.
2. Test the functions listed in the Test Cases table.
3. Feel free to add or modify the records in the database. The data on the Stage platform is intended to be used for testing purposes. You will not harm the official records on the production EST or affect current users.
4. Try to break the application. For example, find out what would happen if you tried to submit a comment on a document you were not assigned to review.
5. Record any errors or problems on the attached spreadsheet. When you are finished testing, email the spreadsheet back to help@fla-etat.org.

Test Cases

The Test Team members will test functions that are available to their assigned user role(s). The following table lists the available functions and the user roles with access to each function.

Function	Role	Test Case
Reports		
Performance Management>Surveys	CEMO Manager	Review results and compare to the submitted surveys to ensure accurate calculations

Error Reporting

Testers will report errors and omissions to the Help Desk. The following information will be documented for each error:

- Request # (if applicable)
- Page Title or File Name
- Description of Steps Leading to Error
- Error Type (crash, hang, privileges, etc.)
- Error message

Testers will submit results to the EST Help Desk email address. Tasks will be assigned by the application development project manager to the appropriate programmer for resolution.

Attachment A: Sample Script

The following script was adapted with permission from Krug (2010). Instructions for the facilitator are bold text located in boxes. The remaining text is the facilitator's narration to the user.

Turn on the recorder.

Hi, ___________. This is ___________, and I'm going to be walking you through this session today. I also have ______________________________ here in the room with me.

______________________________, from the development team are also on line with us.

Thank you for helping us out today. You probably already have a good idea of why we asked you here, but let me go over it again briefly. We're asking people to show us how they use the Environmental Screening Tool so we can figure out how to make it better. Today we're focusing on ________________________. The session should take about an hour.

The first thing I want to make clear right away is that we're testing the *site*, not you. You can't do anything wrong here. In fact, this is probably the one place today where you don't have to worry about making mistakes.

As you use the site, I'm going to ask you as much as possible to try to think out loud: to say what you're looking at, what you're trying to do, and what you're thinking. This will be a big help to us.

Also, please don't worry that you're going to hurt our feelings. We're doing this to improve the site, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done I'll try to try to answer them then. And if you need to take a break at any point, just let me know.

With your permission, we're recording what happens on the screen and our conversation. The recording will only be used to help us figure out how to improve the site, and it won't be seen by anyone except the people working on this project. And it helps me, because I don't have to take as many notes. Do we have your permission to record the session?

Wait for response. If they say no, turn off the recorder and ask one of the observers to take detailed notes.

Thank you. Do you have any questions so far?

OK. Before we look at the site, I'd like to ask you a few quick questions.

First, there are some people attending who haven't met you yet. Would you please explain your job within the ETDM Process? What types of ETDM-related tasks do you do?

Now, roughly how many hours a week altogether—just a ballpark estimate— would you say you spend using the Internet, including Web browsing and email, at work and at home?

And what's the split between email and browsing—a rough percentage?

What kinds of sites are you looking at when you browse the Web?

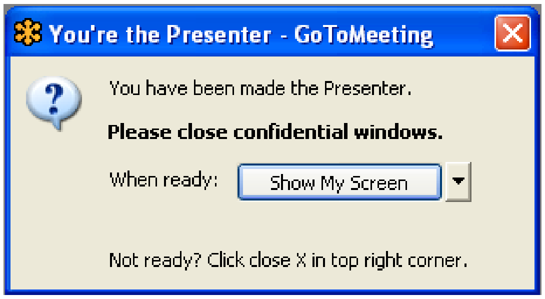
Do you have any favorite Web sites?

How often do you use the EST?

OK, great. We're done with the questions, and we can start looking at things. I'm going to turn the screen control over to you.

Select the option in the GoToMeeting tool bar to give the user control of the screen.

Ok. You should see a box on your screen with a button that says "Show My Screen." Just click on that button when you're ready.



Let them click on the button and help them if they have any problems.

Now open internet explorer and go to ***http://stage.fla-etat.org***. This is our test version of the EST. It may not look exactly like what you're used to, but should be pretty close. Go ahead and log in.

If they forgot to bring the username and password, go ahead and tell them. Continue when the site finishes loading.

First, I'm going to ask you to look at this page and tell me what you make of it: what strikes you about it, whose site you think it is, what you can do here, and what it's for. Just look around and do a little narrative.

You can scroll if you want to, but don't click on anything yet.

Allow this to continue for three or four minutes, at most.

Thanks. Now I'm going to ask you to try doing some specific tasks. I'm going to read each one out loud. These are the same tasks that you should have received a copy of in your email before the meeting started.

And again, as much as possible, it will help us if you can try to think out loud as you go along.

- **Hand the participant the first scenario, and read it aloud.**
- **Allow the user to proceed until you don't feel like it's producing any value or the user becomes very frustrated.**
- **Repeat for each task until all the scenarios have been attempted or time runs out.**

Thanks, that was very helpful.

Let's see if anyone on the team has follow-up questions they'd like to ask you.

Ask observers if they any questions.

Do you have any questions for me, now that we're done?

- **Stop the recording.**
- **Thank them for their time.**
- **Stop the GoToMeeting session.**
- **Email the session recording to *help@fla-etat.org***

Attachment B: Observer Instructions

(Adapted with permission from Krug, 2010)

Thanks for coming to today's tests. Each of the three sessions will last about 50 minutes, with a ten-minute break in between. Using the same GoToMeeting, observe the test to help identify priority problems and recommend solutions to make the site easier to use. During the test, mute the telephone in the observers' room until the "Follow-up" item on the agenda.

To get as much as we can out of these tests, we need your help with a few things:

- **Take notes.** Please make notes about anything interesting you notice, particularly points where the user was confused or couldn't get the tasks done. We'll be comparing notes during the debriefing session at lunchtime today.
- **Make a list at the end of each session.** During the break between sessions, use the next page in this document to jot down the three most serious usability problems you noticed in that session.
- **Stay online for the debriefing.** After the last session with the users, we'll compare notes and decide what we can do to solve any usability problems identified.
- **If you think of a question you'd like to ask the participant, write it down.** Near the end of each session, we'll check to see if you have any questions.
- **Try to avoid distracting others.** Limit your conversation to what you're observing. If you need to have another kind of discussion or answer a phone call, please step outside the room. Think of it as a movie theater: don't talk loud enough or long enough that the people around you can't follow the plot.
- **Email your notes to the facilitator.** After the debriefing, the facilitator compiles the notes and results. S/he will email the draft report to the observers for review. Upon approval, it will be sent to all of the participants.

Thanks for your help!

Top three usability problems

After each test session, list the three most serious usability problems you noticed.

Participant #1

1.____

2.____

3.____

Participant #2

1.____

2.____

3.____

Participant #3

1.____

2.____

3.____

Attachment C: Usability Test Check List

(Adapted from Krug, 2010)

Three weeks before

- ❑ Figure out what needs to be tested (test topic)
- ❑ Identify participants (Facilitator, Observers, Users)
- ❑ Email list of tasks to test
- ❑ Confirm session logistics (schedule, location, GoToMeeting reservation)
- ❑ Invite participants

One week before

- ❑ Write scenario(s) and send to observers for review
- ❑ Update test script and send to observers for review
- ❑ Check user accounts on Stage

One or two days before

- ❑ Contact participants to reconfirm and ask if they have any questions
- ❑ Email reminder to observers
- ❑ Finish writing the scenarios
- ❑ Do a pilot test of the scenarios
- ❑ Create a list of user names/passwords that will be used (keep it handy during test)
- ❑ Email scenarios to user participants
- ❑ Email copies of handouts to observers
  - ❑ Instructions for Usability Test Observers
  - ❑ List of scenarios
  - ❑ Copy of the test script
- ❑ Verify that no one has double-booked your test and observation rooms, and needed equipment is available

Test day (before the first test)

- ❑ Turn on the laptop and overhead projector in the EMO training room
- ❑ Log on to the EST Stage server and open the pages the users will be testing
- ❑ Ten minutes before the first session, log on to the GoToMeeting and call the teleconference line.
- ❑ Make sure the GoToMeeting and speakerphones in the observation room and test room are working

Before each test

- ❑ Start the recording

At the end of each test

- ❑ Stop the recording
- ❑ Email the recording to help@fla-etat.org
- ❑ Take time before the next session to jot down a few notes about things you observed, make any adjustments to the test script or scenario that are needed

After the test sessions

- ❑ Conduct the debriefing
- ❑ Prepare test notes
- ❑ Submit draft notes to observers and technical editor for review
- ❑ Finalize notes based on comments received
- ❑ Send notes to the project managers and all participants

Updated Project Schedule

Environmental Screening Tool Implementation Schedule

Time Line	Action
January 2000 – December 2001	Participate in Agency meetings to determine technology requirements as process is defined
September 2000	Interagency Technology Work Group develops strategy for technology
January 2001	Demonstrate Initial Prototype of GIS application to Agency Working Group
July 2001	Implementation Plan and general requirements document complete
Fall 2001	• Conduct Interagency GIS Workshops to refine data requirements • Demonstrate refined prototype at FDOT Environmental Management conference
January 2002 – May 2002	Continue meeting with focus groups, task work groups and steering committee to refine prototype as general operating procedures are developed for the ETDM Process
June 2002	Conduct Mock Environmental Technical Advisory Team (ETAT) meeting to test EST and ETDM Process
July 2002 – February 2003	Revise prototype based on additional feedback on process as specific operating procedures are developed
March 2003	• Begin Staged Implementation of ETDM Process • EST will be released, but additional requirements and enhancements are anticipated as the ETDM Process is used for the first time
June 2003 – December 2003	Respond to priority enhancements identified during training
January 2004 – December 2004	Respond to enhancements identified during 1st year of ETDM implementation
October 2004 - October 2005	Convert existing site to new integrated interface
October - November 2005	Testing Stage • Converted site moved to STAGE server • Beta Testing with Target Users • User handbook is completed • Test team provide input to dev team • Development Team corrects errors
November 2005	Implementation Stage • User Training Conducted
December 2005	Converted site moved to Production server
January 2006	Begin Maintenance Stage • Respond to priority enhancements identified from Task Work Groups and Steering Committee • Respond to outstanding user enhancement requests
Program corrections and minor enhancements from this point forward are tracked in Bugzilla, the EST task management application. Milestones of major enhancements are listed below.	
February 2006	New Public Site requirements complete
March 2006	• Public Site – Design Stage

Time Line	Action
	• On-line Invoicing – Requirements and Design Complete • Advance Notification/Federal Consistency – Requirements Complete
April 2006	• Public Site – Development Stage Began • Integrated Map Viewer – Design • On-line Invoicing – Development Stage Began • Advance Notification/Federal Consistency – Development
August 2006	Summary of Public Comment Report – Requirements/Design
September 2006	• Summary of Public Comment Report – Development • Integrated Map Viewer Development Began • Performance Management System – Requirements
October 2006	• Public Site – Testing • Summary of Public Comment Report – Internal Testing • Performance Management System – Design • On-line Invoicing – Testing
October 31, 2006	Public Site Deployed to Production
November 2006	• ETDM Coordinator and CLC Training on Public Site • Performance Management System – Development Began
December 2006	• Cumulative Effects Prototype Requirements complete • On-line Invoicing – Production for historic data migration
January 2007	Cumulative Effects Prototype Development Began
February 2007	EDMS/EST Integration – Requirements began
April 2007	Advance Notification/Federal Consistency – Testing
May 2007	• Advance Notification – Production • Summary of SCE Comments Report – Requirements/Design/Development • On-Line Invoicing – Initial Agency Training • EDMS/EST Integration – Design/Development
June 2007	• Summary of Public Comment Report – Production • Summary of SCE Comments Report – Testing • Performance Management System – Testing Began
July 2007	Cumulative Effects Prototype Testing
August 2007	• SCE Map Tools – Design/Development • EDMS/EST Integration – Testing of document transfer complete
September 2007	• Integrated Map Viewer – Testing • EDMS/EST Integration – Production • SCE Ad Hoc Report – Development

Time Line	Action
October 2007	• SCE Map Tools – Testing (part of new Map Viewer) • SCE Ad Hoc Report – Testing
November 2007	• Summary of SCE Comments Report – Production • SCE Ad Hoc Report – Production
January 2008	• Performance Management System – Production • Invoicing System Enhancements – Design/Development
February 2008	• CCI Enhancements – Design/Development • Security Enhancements – Testing
March 2008	Security Enhancements – Production
May 2008	• AN/Federal Consistency – Testing • CCI Enhancements – Testing • Invoicing System Enhancements – Testing • Quality Assurance Reports – Design/Development
June 2008	• AN/Federal Consistency – Production • Invoicing Enhancements – Production
August 2008	• CCI Enhancements – Production • Integrated Map Viewer – Production • Quality Assurance Reports – Testing
September 2008	Quality Assurance Reports – Production
October 2008	• Project Tracker v 1 – Requirements/Design • Invoicing – Offline Activity Log –Training • Project Schedule Enhancements – Requirements/Design
November 2008	• Project Tracker v 1 – Design/Development • Project Schedule Enhancements – Development
December 2008	• Project Tracker v 1 – Testing • Project Tracker v 2 – Requirements/Design
January 2009	• Project Tracker v 2 – Development • Project Schedule Enhancements – Testing
February 2009	Project Schedule Enhancements – Production
March 2009	Document Review – Requirements
April 2009	Document Review – Design/Development
May 2009	Project Tracker – Training/Production
June 2009	• Project Schedule – Training /Production • Document Review – Testing

Time Line	Action
July 2009	SCE Participation Report – Requirements
August 2009	SCE Participation Report – Design
September 2009	• 2010 ETDM Surveys – Planning/Requirements • Performance Management Report Enhancements – Planning
October 2009	• 2010 ETDM Surveys – Development • Performance Management Report Enhancements – Requirements • SCE Participation Report – Development
November 2009	Document Review – Production
December 2009	• 2010 ETDM Surveys – Testing • SCE Participation Report – Testing
January 2010	• 2010 ETDM Surveys – Production • Performance Management Report Enhancements – Design • AN Package Simplification Enhancements – Planning • Map Viewer/Editor Simplification Enhancements – Planning
February 2010	Performance Management Report Enhancements – Development/Testing
March 2010	• Performance Management Report Enhancements – Production • AN Package Simplification Enhancements – Requirements • Map Viewer/Editor Simplification Enhancements – Requirements • SCE Participation Report – Production
April 2010	• AN Package Simplification Enhancements – Design and Development • Site Search – Production
May 2010	• Create AN Package Simplification – Testing and Production
June 2010	AN Transmittal List Simplification – Design and Development
July 2010	AN Transmittal List Simplification – Development and Testing
August 2010	• EST Menu Simplification – Production • AN Transmittal List Simplification – Production • Calendar Simplification Enhancements – Requirements
September 2010	• Map Viewer/Editor Simplification – Design • Calendar Simplification Enhancements – Design • GIS Analysis Results Report (Feature Level Analysis Results) – Requirements
October 2010	• GIS Analysis Results Report (Feature Level Analysis Results) – Development • Calendar Simplification Enhancements – Development
November 2010	Map Viewer/Editor Simplification – Development
December 2010	Local Agency Program Enhancements – Production

Time Line	Action
January 2011	Calendar Simplification Enhancements – Testing
February 2011	Map Viewer Simplification – Development
March 2011	Calendar Simplification – Testing
April 2011	• Calendar Simplification – Production • GIS Analysis Results Report (Feature Level Analysis Results) – Production • Map Viewer Simplification – Testing
May 2011	Map Viewer Simplification – Production
June 2011	Map Editor Simplification – Development
July 2011	Map Editor Simplification – Testing
August 2011	• Map Editor Simplification – Production • Project Tracker Simplification – Requirements

Project Review Issue Lists

Information Systems Development Methodology
Project Review Issue List

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2007_1130
Directory Location:			

Review Type:
- ☑ Inspection
- ❒ Re-inspection
- ❒ Peer Review
- ❒ Re-Review
- ❒ Requirements Document
- ❒ Design Document
- ☑ Code
- ❒ Other

Preparation Time:	Date	Time (hours)	Date	Time (hours)

Location	Issue Description	Issue		
		Type	Class	Severity

Issue Type: (Use issue types as shown for category of item being inspected)
Documentation *(Requirements Doc., Design Doc., Code)* - CS=Consistency, CT=Content, DN=Definition, HF=Human Factors, OR=Organization, RD=Readability, SN=Syntax, ST=Standards, OT=Other

Architecture or code (*Design, Code)* - DA=Data, DC=Documentation, FN=Functionality, HF=Human Factors, IF=Interface, IO=Input/Output, LO=Logic, MN=Maintainability, PF=Performance, SN=Syntax, ST=Standards, OT=other

Test Plans - DA=Data, DC=Documentation, FN=Functionality, HF=Human Factors, IF=Interface, IO=Input/Output, LO=Logic, MN=Maintainability, PF=Performance, SN=Syntax, ST=Standards, TC=Test Case, TE=Test Environment, TP=Test Plan, OT=other
Issue Class: M=Missing, W=Wrong, E=Extra, A=Ambiguous, I=Inconsistent
Issue Severity: J=Major, N=Minor

Project Review Issue List Description

Project - Name of project
Moderator - Name of moderator
Project Review Item - Item being reviewed
Meeting Date - Date of review
Recorder - Recorder's name
Version - Version number of the review items, if applicable
Preparation Log - Used to track time spent on review's preparation task (nearest 1/2 hour)
Location - Location of the issue (paragraph, section, line, module etc.)
Issue Description - Brief description of the issue
Issue Type –

Type	Description
(CS) – consistency	Inconsistent specification either within the document or with other planning documents
(CT) – content	Inadequate, incorrect, or unnecessary information
(DA) – data	Issues in data specification; improper declaration, initialization, or description of data; incorrect data usage, conversion of data types, or array boundaries
(DC) – documentation	Inadequate or incorrect component descriptions
(DN) – definition	Missing, wrong, or extra definition of terminology
(FN) – functionality	Issues in the specification of the functions of a component
(HF) - human factors	Poor or lacking regard to human factors; unnecessary operator involvement
(IF) - interface	Issues in the communication between software components
(IO) - input/output	Issues in communication with or specification of external data or devices
(LO) - logic	Issues in procedures or in sequence, selection, iteration of operations; incorrect algorithms or mathematical computation
(MN) - maintainability	An expectation that the work product is difficult to maintain, excluding issues in documentation
(OR) - organization	Awkward or noncohesive presentation of information
(PF) - performance	An expectation of not meeting the required execution efficiency
(RD) - readability	Difficult to understand; inappropriate language, syntax, word use or notation
(SN) - syntax	Issues in grammar, punctuation, spelling, and specification language usage
(ST) - standards	A deviation from procedural or representational standards
(TC) - test case	Incomplete or inaccurate specifications of a test condition, or a deviation from the test plan
(TE) - test environment	Issues in the definition or specification of the test hardware or software environment, level of security, or proprietary components
(TP) - test plan	Issues in the definition or specification of test scope, strategy (including test completeness and issue tolerance levels), personnel, tasks, items, or features
(OT) - other	An undefined or ambiguous issue condition

Issue Class - (M)issing, (W)rong, (E)xtra, (A)mbiguous, (I)nconsistent
Issue Severity - ma(J)or: Issues that would result in failure of the item or an observable departure from specifications.
mi(N)or: Issues that would affect only the nonfunctional aspects of the item.

Information Systems Development Methodology
Project Review Issue List

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2008_0829
Directory Location:			

Review Type:
- ☑ Inspection
- ❒ Re-inspection
- ❒ Peer Review
- ❒ Re-Review
- ❒ Requirements Document
- ❒ Design Document
- ☑ Code
- ❒ Other

Preparation Time:	Date	Time (hours)	Date	Time (hours)

Location	Issue Description	Issue Type	Issue Class	Issue Severity

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Test Plans - DA=Data, DC=Documentation, FN=Functionality, HF=Human Factors, IF=Interface, IO=Input/Output, LO=Logic, MN=Maintainability, PF=Performance, SN=Syntax, ST=Standards, TC=Test Case, TE=Test Environment, TP=Test Plan, OT=other
Issue Class: M=Missing, W=Wrong, E=Extra, A=Ambiguous, I=Inconsistent
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Project Review Issue List Description

Project - Name of project
Moderator - Name of moderator
Project Review Item - Item being reviewed
Meeting Date - Date of review
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Version - Version number of the review items, if applicable
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mi(N)or: Issues that would affect only the nonfunctional aspects of the item.

Information Systems Development Methodology
Project Review Issue List

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2009_0731
Directory Location:			

Review Type:
☑ Inspection ❒ Re-inspection ❒ Peer Review ❒ Re-Review
❒ Requirements Document ❒ Design Document ☑ Code ❒ Other

Preparation Time:	Date	Time (hours)	Date	Time (hours)

Location	Issue Description	Issue		
		Type	Class	Severity

Issue Type: (Use issue types as shown for category of item being inspected)
Documentation *(Requirements Doc., Design Doc., Code)* - CS=Consistency, CT=Content, DN=Definition, HF=Human Factors, OR=Organization, RD=Readability, SN=Syntax, ST=Standards, OT=Other

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Issue Class: M=Missing, W=Wrong, E=Extra, A=Ambiguous, I=Inconsistent
Issue Severity: J=Major, N=Minor

Project Review Issue List Description

Project - Name of project
Moderator - Name of moderator
Project Review Item - Item being reviewed
Meeting Date - Date of review
Recorder - Recorder's name
Version - Version number of the review items, if applicable
Preparation Log - Used to track time spent on review's preparation task (nearest 1/2 hour)
Location - Location of the issue (paragraph, section, line, module etc.)
Issue Description - Brief description of the issue
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Information Systems Development Methodology
Project Review Issue List

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2010_0731
Directory Location:			

Review Type:
- ☑ Inspection
- ❐ Re-inspection
- ❐ Peer Review
- ❐ Re-Review
- ❐ Requirements Document
- ❐ Design Document
- ☑ Code
- ❐ Other

Preparation Time:	Date	Time (hours)	Date	Time (hours)

Location	Issue Description	Issue Type	Issue Class	Issue Severity

Issue Type: (Use issue types as shown for category of item being inspected)
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Issue Class: M=Missing, W=Wrong, E=Extra, A=Ambiguous, I=Inconsistent
Issue Severity: J=Major, N=Minor

Project Review Issue List Description

Project - Name of project
Moderator - Name of moderator
Project Review Item - Item being reviewed
Meeting Date - Date of review
Recorder - Recorder's name
Version - Version number of the review items, if applicable
Preparation Log - Used to track time spent on review's preparation task (nearest 1/2 hour)
Location - Location of the issue (paragraph, section, line, module etc.)
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Information Systems Development Methodology
Project Review Issue List

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2011_0831
Directory Location:			

Review Type: ☑ Inspection ❒ Re-inspection ❒ Peer Review ❒ Re-Review
❒ Requirements Document ❒ Design Document ☑ Code ❒ Other

Preparation Time:	Date	Time (hours)	Date	Time (hours)

Location	Issue Description	Issue Type	Issue Class	Issue Severity

Issue Type: (Use issue types as shown for category of item being inspected)
Documentation *(Requirements Doc., Design Doc., Code)* - CS=Consistency, CT=Content, DN=Definition, HF=Human Factors, OR=Organization, RD=Readability, SN=Syntax, ST=Standards, OT=Other

Architecture or Code (*Design, Code)* - DA=Data, DC=Documentation, FN=Functionality, HF=Human Factors, IF=Interface, IO=Input/Output, LO=Logic, MN=Maintainability, PF=Performance, SN=Syntax, ST=Standards, OT=other

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Issue Class: M=Missing, W=Wrong, E=Extra, A=Ambiguous, I=Inconsistent
Issue Severity: J=Major, N=Minor

Project Review Issue List Description

Project - Name of project
Moderator - Name of moderator
Project Review Item - Item being reviewed
Meeting Date - Date of review
Recorder - Recorder's name
Version - Version number of the review items, if applicable
Preparation Log - Used to track time spent on review's preparation task (nearest 1/2 hour)
Location - Location of the issue (paragraph, section, line, module, etc.)
Issue Description - Brief description of the issue
Issue Type –

Type	Description
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(OT) - other	An undefined or ambiguous issue condition

Issue Class - (M)issing, (W)rong, (E)xtra, (A)mbiguous, (I)nconsistent
Issue Severity - ma(J)or: Issues that would result in failure of the item or an observable departure from specifications.
mi(N)or: Issues that would affect only the nonfunctional aspects of the item.

Project Review Management Reports

Information Systems Development Methodology
Project Review Management Report

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2007_1130
Directory Location:			

Meeting Type:	☑ Inspection	❐ Re-inspection	❐ Peer Review	❐ Re-Review
Review Type:	❐ Requirements Document	❐ Design Document	☑ Code	❐ Other
Disposition:	❐ Accept	❐ Conditional	❐ Re-inspect	

Duration of Review Meeting(s): ________ (hours)

Number of Reviews: ________ (all)

Size of Materials: ________ (lines/pages)

Total Preparation Time: ________ (hours)

Total Minor Issues: ________

Total Major Issues: ________

Number of Review Meetings: ________

Rework Completed by: ________ (date)

Estimated Rework Effort: ________ (hours)

Re-inspection Scheduled for: ________ (date)

Actual Rework Effort: ________ (hours)

Inspectors/Peers:

________________________________ ________________________________

________________________________ ________________________________

________________________________ ________________________________

Additional Moderator Time (For Conditional Disposition): __________ (hours)

Moderator Signature: ________________________________

Completion Date: ________________________________

Additional Comments:

____

____

____

Project Review Management Report Description

Project – Name of project
Meeting Date – Date of review
Moderator – Name of moderator
Recorder – Name of recorder
Document Name – Titled by Author
Version - Version number of review product, if applicable
Directory Location – Location of the Project's information, located in S:\Technology Projects directory
Meeting Type – Inspection – first occurrence of inspecting this product/documentation. Re-inspection – inspecting this product/documentation a duplicate time. Peer Review – first occurrence of a peer review of this product/documentation. Re-review – a peer review of this product/documentation a duplicate time.
Review Type – the document that will be reviewed (includes the Requirements document; Design document; Code, etc.)
Disposition - Accept - review of documentation/code is acceptable, project can proceed; Conditional - minor issues, only moderator needs to review changes; Re-inspect/review: Review team should re-review the project after changes are made.
Duration of meeting(s) - The total time used for the review meeting(s). Meeting breaks are included.
Number of participants - Total number of reviewers including the moderator and author.
Size of materials - The amount of the materials reviewed (Please note that this is normally reported in pages, except for code)
Total preparation time - The sum of all individual preparation times, including moderator's prep time, for all meeting sessions, per review.
Total minor issues - The sum of all minor issues.
Total major issues - The sum of all major issues.
Number of review meetings – One (1) if review completed in one meeting, more than one for multi-session meetings.
Rework completed by - The author's commitment to a completion date for rework. This date is generally not entered into the Project database.
Estimated rework effort - The author's estimate of the amount of work required to resolve the issues. This estimate is generally not entered into the Project database.
Re-inspection/review scheduled for - Used only when the Disposition is re-inspect. This date is generally not entered into the Project database.
Actual rework effort - The amount of effort the author has expended to resolve the issues. This field is completed after reexamination by the moderator or after a re-inspection or re-review meeting. If the Disposition is "conditional", then leave this field blank and the estimated rework effort will be used. This information is entered into the Project database.
Inspectors/Peers - Lists all the inspectors/peers excluding the author
Moderator Review Time (For Conditional Disposition): Record the time required (hours) to verify that the issues found during the review have been corrected. (Applies only to reviews where the Disposition was "Conditional".)
Moderator signature - The signature of the moderator is given at the completion of the meeting unless the Disposition is "Conditional", whereby it will be given after the rework is examined.
Completion date - Date of Disposition or upon completion of rework examination in the case of a "Conditional" Disposition.
Additional comments - May be provided to note any conditions, suggestions, etc., which the inspectors/peers wish to record, such as recommended changes to standards. These comments are not stored in the Product database.

NOTE: The author should not be specifically identified. In this way, issue data is separated from management review of author performance data.

Information Systems Development Methodology
Project Review Management Report

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2008_0829
Directory Location:			

Meeting Type:	☑ Inspection	❒ Re-inspection	❒ Peer Review	❒ Re-Review
Review Type:	❒ Requirements Document	❒ Design Document	☑ Code	❒ Other
Disposition:	❒ Accept	❒ Conditional	❒ Re-inspect	

Duration of Review Meeting(s): ________ (hours) Number of Reviews: ________ (all)

Size of Materials: ________ (lines/pages) Total Preparation Time: ________ (hours)

Total Minor Issues: ________ Total Major Issues: ________

Number of Review Meetings: ________

Rework Completed by: ________ (date) Estimated Rework Effort: ________ (hours)

Re-inspection Scheduled for: ________ (date) Actual Rework Effort: ________ (hours)

Inspectors/Peers:

________________________ ________________________

________________________ ________________________

________________________ ________________________

Additional Moderator Time (For Conditional Disposition): __________ (hours)

Moderator Signature: ________________________________

Completion Date: ________________________________

Additional Comments:

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Project Review Management Report Description

Project – Name of project
Meeting Date – Date of review
Moderator – Name of moderator
Recorder – Name of recorder
Document Name – Titled by Author
Version - Version number of review product, if applicable
Directory Location – Location of the Project's information, located in S:\Technology Projects directory
Meeting Type – Inspection – first occurrence of inspecting this product/documentation. Re-inspection – inspecting this product/documentation a duplicate time. Peer Review – first occurrence of a peer review of this product/documentation. Re-review – a peer review of this product/documentation a duplicate time.
Review Type – the document that will be reviewed (includes the Requirements document; Design document; Code, etc.)
Disposition - Accept - review of documentation/code is acceptable, project can proceed; Conditional - minor issues, only moderator needs to review changes; Re-inspect/review: Review team should re-review the project after changes are made.
Duration of meeting(s) - The total time used for the review meeting(s). Meeting breaks are included.
Number of participants - Total number of reviewers including the moderator and author.
Size of materials - The amount of the materials reviewed (Please note that this is normally reported in pages, except for code)
Total preparation time - The sum of all individual preparation times, including moderator's prep time, for all meeting sessions, per review.
Total minor issues - The sum of all minor issues.
Total major issues - The sum of all major issues.
Number of review meetings – One (1) if review completed in one meeting, more than one for multi-session meetings.
Rework completed by - The author's commitment to a completion date for rework. This date is generally not entered into the Project database.
Estimated rework effort - The author's estimate of the amount of work required to resolve the issues. This estimate is generally not entered into the Project database.
Re-inspection/review scheduled for - Used only when the Disposition is re-inspect. This date is generally not entered into the Project database.
Actual rework effort - The amount of effort the author has expended to resolve the issues. This field is completed after reexamination by the moderator or after a re-inspection or re-review meeting. If the Disposition is "conditional", then leave this field blank and the estimated rework effort will be used. This information is entered into the Project database.
Inspectors/Peers - Lists all the inspectors/peers excluding the author
Moderator Review Time (For Conditional Disposition): Record the time required (hours) to verify that the issues found during the review have been corrected. (Applies only to reviews where the Disposition was "Conditional".)
Moderator signature - The signature of the moderator is given at the completion of the meeting unless the Disposition is "Conditional", whereby it will be given after the rework is examined.
Completion date - Date of Disposition or upon completion of rework examination in the case of a "Conditional" Disposition.
Additional comments - May be provided to note any conditions, suggestions, etc., which the inspectors/peers wish to record, such as recommended changes to standards. These comments are not stored in the Product database.

NOTE: The author should not be specifically identified. In this way, issue data is separated from management review of author performance data.

Information Systems Development Methodology
Project Review Management Report

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2009_0731
Directory Location:			

Meeting Type:	☑ Inspection	❒ Re-inspection	❒ Peer Review	❒ Re-Review
Review Type:	❒ Requirements Document	❒ Design Document	☑ Code	❒ Other
Disposition:	❒ Accept	❒ Conditional	❒ Re-inspect	

Duration of Review Meeting(s): _______ (hours) Number of Reviews: _______ (all)

Size of Materials: _______ (lines/pages) Total Preparation Time: _______ (hours)

Total Minor Issues: _______ Total Major Issues: _______

Number of Review Meetings: _______

Rework Completed by: _______ (date) Estimated Rework Effort: _______ (hours)

Re-inspection Scheduled for: _______ (date) Actual Rework Effort: _______ (hours)

Inspectors/Peers:

Additional Moderator Time (For Conditional Disposition): _________ (hours)

Moderator Signature: ______________________________

Completion Date: ______________________________

Additional Comments:

Project Review Management Report Description

Project – Name of project
Meeting Date – Date of review
Moderator – Name of moderator
Recorder – Name of recorder
Document Name – Titled by Author
Version - Version number of review product, if applicable
Directory Location – Location of the Project's information, located in S:\Technology Projects directory
Meeting Type – Inspection – first occurrence of inspecting this product/documentation. Re-inspection – inspecting this product/documentation a duplicate time. Peer Review – first occurrence of a peer review of this product/documentation. Re-review – a peer review of this product/documentation a duplicate time.
Review Type – the document that will be reviewed (includes the Requirements document; Design document; Code, etc.)
Disposition - Accept - review of documentation/code is acceptable, project can proceed; Conditional - minor issues, only moderator needs to review changes; Re-inspect/review: Review team should re-review the project after changes are made.
Duration of meeting(s) - The total time used for the review meeting(s). Meeting breaks are included.
Number of participants - Total number of reviewers including the moderator and author.
Size of materials - The amount of the materials reviewed (Please note that this is normally reported in pages, except for code)
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Total major issues - The sum of all major issues.
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Re-inspection/review scheduled for - Used only when the Disposition is re-inspect. This date is generally not entered into the Project database.
Actual rework effort - The amount of effort the author has expended to resolve the issues. This field is completed after reexamination by the moderator or after a re-inspection or re-review meeting. If the Disposition is "conditional", then leave this field blank and the estimated rework effort will be used. This information is entered into the Project database.
Inspectors/Peers - Lists all the inspectors/peers excluding the author
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Moderator signature - The signature of the moderator is given at the completion of the meeting unless the Disposition is "Conditional", whereby it will be given after the rework is examined.
Completion date - Date of Disposition or upon completion of rework examination in the case of a "Conditional" Disposition.
Additional comments - May be provided to note any conditions, suggestions, etc., which the inspectors/peers wish to record, such as recommended changes to standards. These comments are not stored in the Product database.

NOTE: The author should not be specifically identified. In this way, issue data is separated from management review of author performance data.

Information Systems Development Methodology
Project Review Management Report

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2010_0731
Directory Location:			

Meeting Type:	☑ Inspection	❒ Re-inspection	❒ Peer Review	❒ Re-Review
Review Type:	❒ Requirements Document	❒ Design Document	☑ Code	❒ Other
Disposition:	❒ Accept	❒ Conditional	❒ Re-inspect	

Duration of Review Meeting(s):	________	(hours)	Number of Reviews:	________	(all)
Size of Materials:	________	(lines/pages)	Total Preparation Time:	________	(hours)
Total Minor Issues:	________		Total Major Issues:	________	
Number of Review Meetings:	________				
Rework Completed by:	________	(date)	Estimated Rework Effort:	________	(hours)
Re-inspection Scheduled for:	________	(date)	Actual Rework Effort:	________	(hours)

Inspectors/Peers:

________________________________ ________________________________

________________________________ ________________________________

________________________________ ________________________________

Additional Moderator Time (For Conditional Disposition): __________ (hours)

Moderator Signature: ____________________________________

Completion Date: ________________________________

Additional Comments:

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Project Review Management Report Description

Project – Name of project
Meeting Date – Date of review
Moderator – Name of moderator
Recorder – Name of recorder
Document Name – Titled by Author
Version - Version number of review product, if applicable
Directory Location – Location of the Project's information, located in S:\Technology Projects directory
Meeting Type – Inspection – first occurrence of inspecting this product/documentation. Re-inspection – inspecting this product/documentation a duplicate time. Peer Review – first occurrence of a peer review of this product/documentation. Re-review – a peer review of this product/documentation a duplicate time.
Review Type – the document that will be reviewed (includes the Requirements document; Design document; Code, etc.)
Disposition - Accept - review of documentation/code is acceptable, project can proceed; Conditional - minor issues, only moderator needs to review changes; Re-inspect/review: Review team should re-review the project after changes are made.
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Information Systems Development Methodology
Project Review Management Report

Project:	Environmental Screening Tool	Meeting Date:	
Moderator:	Peter McGilvray	Recorder:	
Document Name:	10% Code	Version:	2011_0831
Directory Location:			

Meeting Type:	☑ Inspection	❒ Re-inspection	❒ Peer Review	❒ Re-Review
Review Type:	❒ Requirements Document	❒ Design Document	☑ Code	❒ Other
Disposition:	❒ Accept	❒ Conditional	❒ Re-inspect	

Duration of Review Meeting(s):	________	(hours)	Number of Reviews:	________	(all)
Size of Materials:	________	(lines/pages)	Total Preparation Time:	________	(hours)
Total Minor Issues:	________		Total Major Issues:	________	
Number of Review Meetings:	________				
Rework Completed by:	________	(date)	Estimated Rework Effort:	________	(hours)
Re-inspection Scheduled for:	________	(date)	Actual Rework Effort:	________	(hours)

Inspectors/Peers:

________________________________ ________________________________

________________________________ ________________________________

________________________________ ________________________________

Additional Moderator Time (For Conditional Disposition): __________ (hours)

Moderator Signature: ____

Completion Date: ________________________________

Additional Comments:

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Project Review Management Report Description

Project – Name of project
Meeting Date – Date of review
Moderator – Name of moderator
Recorder – Name of recorder
Document Name – Titled by Author
Version – Version number of review product, if applicable
Directory Location – Location of the Project's information, located in S:\Technology Projects directory
Meeting Type – Inspection – first occurrence of inspecting this product/documentation. Re-inspection – inspecting this product/documentation a duplicate time. Peer Review – first occurrence of a peer review of this product/documentation. Re-review – a peer review of this product/documentation a duplicate time.
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Project Revision Logs

Project Revision Log

Date

July 31, 2012

Project Name | Version

Environmental Screening Tool (EST)

Document Name

System Test Plan

Revision #	Date	Brief Description of Change	Project Manager Initials
1	8/08/2006	Updated Chapters 1, 2 and 3 of System Test Plan	
2	8/29/2008	Added Test Plans for Performance Management, AN/Federal Consistency, Security Enhancements, Invoicing Enhancements, and Community Characteristics Inventory (CCI) Enhancements	
3	7/31/2009	Added Test Plans for Integrated Map Viewer, Quality Assurance (QA) Reports, and Project Tracker	
4	6/30/2010	Added Test Plans for Document Review and SCE Participation Report	
5	7/31/2012	Added section for Usability Test Procedures (Section 3.4) and Test Plans for Map Editor Tools, Map Viewer User Interface, ETDM Calendar Enhancements, GIS Analysis Results Report Enhancements (Feature Level), Performance Management Report Enhancements, and SCE Participation Report (Chapter 8)	

Project Revision Log

Date

4/30/2008

Project Name | Version

Environmental Screening Tool (EST)

Document Name

Updated User Handbook

Revision #	Date	Brief Description of Change	Project Manager Initials
	2/8/2008	Updated sections related to Agency On-line Invoicing tools (Sections 3.1.4.9 through 3.1.4.9.9), wizard (Section 3.2.8), and reports (Section 3.3.4.9). See Appendix E in Volume 7.	
	4/30/2008	Added sections related to Eliminated Alternatives (Sections 3.1.1.17, 3.1.2.6, 3.3.1.2, 3.3.1.8, 3.3.3.4, and 3.3.3.5) and Federal Consistency Review (Sections 3.1.2.3, 3.1.2.8, 3.3.2.7, 3.3.2.15, and 3.3.4.5). Updated category sections to reflect menu changes (Sections 3.1.1, 3.1.2, 3.1.4, 3.3, 3.3.1, 3.3.2, 3.3.3, and 3.3.4). See Appendix E in Volume 7.	

Project Revision Log

Date

March 9, 2009

Project Name | Version

Environmental Screening Tool (EST)

Document Name

Updated User Handbook

Revision #	Date	Brief Description of Change	Project Manager Initials
	3/9/2009	Section 1.1: Added references to lists of functions (Section 2.4 and Chapter 3) and availability on EST Site Map	
	3/9/2009	Section 1.2: Updated Internet Explorer (to 7.0)	
	3/9/2009	Section 1.3: Included Security Enhancements updates	
	3/9/2009	Section 1.4: Renamed "Background" and summarized.	
	3/9/2009	Deleted Tables 1-1, 1-2, 1-3 and 1-4	
	3/9/2009	Section 1.5 and Table 1-5: Updated to reflect current roles and privileges information	
	3/9/2009	Section 2.1: Included Security Enhancements updates	
	3/9/2009	Section 2.2: Updated screen captures and text (deleted references to "old site")	
	3/9/2009	Table 2-2: Added current tool options and deleted references to "old site"	
	3/9/2009	Table 2-3: Added current reports and deleted references to "old site"	
	3/9/2009	Table 2-4: Deleted	
	3/9/2009	Section 2.9: Deleted	
	3/9/2009	Section 3.1.3: Added updates for CCI Enhancements	
	3/9/2009	Section 3.1.4: Added new sections and updates for Invoicing Enhancements tools	
	3/9/2009	Section 3.1.5: Added new sections and updates for Performance Management tools	
	3/9/2009	Section 3.2: Added update for Invoicing Enhancements	
	3/9/2009	Section 3.3.1: Added updates for CCI Enhancements	
	3/9/2009	Section 3.3.4: Added update for Invoicing Enhancements	
	3/9/2009	Section 3.3.5: Added updates for CCI Enhancements	
	3/9/2009	Section 3.3.6: Added new sections and updates for Performance Management reports	

Revision #	Date	Brief Description of Change	Project Manager Initials
	3/9/2009	Section 3.4: Added updates to reflect Integrated Map Viewer and CCI Enhancements	
	3/9/2009	Section 3.5: Updated menu screen capture	
	3/9/2009	Chapter 4: Removed “draft” watermark	

Project Revision Log

Date

July 31, 2009

Project Name | Version

Environmental Screening Tool (EST)

Document Name

Updated User Handbook

Revision #	Date	Brief Description of Change	Project Manager Initials
	7/31/2009	Added sections related to Project Tracker tools (Sections 3.1.1.12 and 3.1.1.12.1 through 3.1.1.12.4).	
	7/31/2009	Added sections related to Project Tracker reports (Sections 3.2.1.11 and 3.2.1.11.1 through 3.2.1.11.3).	
	7/31/2009	Added section for Update Project Schedule tool (Section 3.1.1.21).	
	7/31/2009	Added section for Project Schedule report (Section 3.2.1.10).	
	7/31/2009	Added placeholder for section related to Comment on Advance Notification Package tool (Section 3.1.2.1)	
	7/31/2009	Updated section for Track State Clearinghouse Projects tool (Section 3.1.2.9)	
	7/31/2009	Added section State Clearinghouse Federal Audit Report (Section 3.2.6.5).	
	7/31/2009	Added section for Edit ETDM Issues/Actions tool (Section 3.1.5.3).	
	7/31/2009	Added sections related to Issue Tracking reports (Sections 3.2.6.2 and 3.2.6.2.1 through 3.2.6.2.3).	
	7/31/2009	Added sections related to Document Review tools (Sections 3.1.6 and 3.1.6.1 through 3.1.6.6).	
	7/31/2009	Added sections related to Document Review reports (Sections 3.2.7, 3.2.7.1 and 3.2.7.2).	
	7/31/2009	Added sections related to Performance Monitoring reports (Sections 3.2.6.3 and 3.2.6.3.1 through 3.2.6.3.11).	
	7/31/2009	Added sections related to Quality Assurance Review reports (Sections 3.2.6.4 and 3.2.6.4.1 through 3.2.6.4.4).	
	7/31/2009	Updated Table 2-2 EST Tool Options	
	7/31/2009	Updated Table 2-3 EST Report Options	

Note: The EST Handbook is provided as Appendix E of the ISDM Submittal (Volume 7).

Project Revision Log

Date
July 31, 2010

Project Name | Version
Environmental Screening Tool (EST)

Document Name
Updated User Handbook

Revision #	Date	Brief Description of Change	Project Manager Initials
	7/31/2010	Updated section for Attach Documents (Section 3.1.1.6)	
		Added section for Edit Advance Notification Package (Section 3.1.1.8)	
		Added section for Update Alternative Description (Section 3.1.1.13)	
		Added section for Update Potential Lead Agencies (Section 3.1.1.15)	
		Added section for Update Project Phase (Section 3.1.1.17)	
		Added section for Comment on Advance Notification Package (Section 3.1.2.1)	
		Updated section for Describe Secondary & Cumulative Effects (Section 3.1.2.3)	
		Added section for Review Class of Action Determination (Section 3.1.2.5)	
		Added section for Class of Action Determination Report (Section 3.2.2.5)	
		Updated section for Review Purpose and Need Statement (Section 3.1.2.6)	
		Added placeholder for View Additional Project Documents (3.2.1.14)	
		Updated, relocated, and renamed Manage Funding Agreements section to Invoicing Tools and Invoicing Reports (Sections 3.1.6 and 3.2.7)	
		Added section for Agency Activity Batch Uploader (Section 3.1.6.3)	
		Updated sections related to Performance Management Annual Surveys tools (Sections 3.1.5.1 and 3.1.5.2)	
		Updated sections related to Performance Management Annual Surveys reports (Section 3.2.6.1)	

Revision #	Date	Brief Description of Change	Project Manager Initials
		Added placeholder for Projects Needing Advance Notification Review (Section 3.2.4.7)	
		Added placeholder for SCE Evaluation Participation Report (Section 3.2.6.3.12)	
		Added placeholder for ETAT Participation Report (Section 3.2.6.3.8)	
		Added section for Draft ETAT Notifications Wizard (Section 3.3.6)	
		Added section for Manage Contact Lists in Account Settings (Section 3.5.6)	
		Added section for EST Training Videos in Help (3.6.6)	
		Added section for new Quick Search Feature and new top toolbar in Navigation chapter (Section 2.3)	
		Added placeholders for Print Potential Impact Assessment Maps (Section 3.4.4), Hard Copy Map Queue (Section 3.4.5), and Potential Impact Assessment Map Queue (Section 3.4.6)	
		Updated Security Roles and Privileges Spreadsheet in Overview chapter (Section 1.5)	
		Removed Comment on Environmental Documents section (Section 3.1.4.5)	

Note: The EST Handbook is provided as Appendix E of the ISDM Submittal (Volume 7).

Project Revision Log

Date
July 31, 2012

Project Name | Version
Environmental Screening Tool (EST)

Document Name
Updated User Handbook

Revision #	Date	Brief Description of Change	Project Manager Initials
6	7/31/2012	Updated section for Create New Project Record (Section 3.1.1.1)	
		Updated section for Update Project Description (Section 3.1.1.2)	
		Updated section for Assign Project Managers (Section 3.1.1.11)	
		Updated section for Identify Required Permits (Section 3.1.1.14)	
		Updated section for Edit Advance Notification Package (Section 3.1.2.1)	
		Added section for Advance Notification Package – Transmittal List (Section 3.1.2.2)	
		Added section for Advance Notification Package – Transmittal List Batch Uploader (Section 3.1.2.3)	
		Added section for Advance Notification Package – Mailing Labels (Section 3.1.2.4)	
		Added section for Comment on Advance Notification Package (Section 3.1.3.1)	
		Added section for Track ETAT Notifications (Section 3.1.5.2)	
		Added section for Extend ETAT Review Period (Section 3.1.5.3)	
		Added section for Allow Comments After Review Period (Section 3.1.3.1)	
		Renamed Review Internal Document to Document Review (Section 3.1.9) and updated sections related to Document Review (Sections 3.1.9.1 to 3.1.9.3).	
		Removed placeholders for Set Up Partner Review, Review Partner Document, and Respond to Partner Document Reviews.	
		Added section for View Additional Project Documents (Section 3.2.1.5)	

Revision #	Date	Brief Description of Change	Project Manager Initials
		Added section for Project Managers (Section 3.2.7.2)	
		Added section for Permits (Section 3.2.7.5)	
		Added section for Advance Notification Package (Section 3.2.8.1)	
		Added section for Comments on Advance Notification Package (Section 3.2.1.5)	
		Updated section for GIS Analysis Report (Section 3.2.9.2)	
		Updated section for Projects Needing Review Section 3.2.11.8)	
		Added section for Track ETAT Notifications (Section 3.2.11.9)	
		Added section for Document Review (Section 3.2.16)	
		Updated section for Create ETDM Project Wizard (Section 3.3.2)	
		Updated section for Update ETDM Project Wizard (Section 3.3.4)	
		Updated sections related to Maps (Sections 3.4.1 and 3.4.2)	
		Added section for Tip Sheets (Section 3.6.2)	
		Updated section for Calendar (Section 3.6.7)	

Note: The EST Handbook is provided as Appendix E of the ISDM Submittal.

Stage-End Walkthrough Forms

Stage-end Walkthrough Form

Stage:	**Development**
Project Manager:	**Peter McGilvray**
Project Name:	**Environmental Screening Tool**
Date:	**November 30, 2007**

List each deliverable that was completed during this stage:

Implementation Plan (no changes)
EST Code for Enhancements (complete on DEV)
Development Team Test Results
Stage-end Walkthrough Form
Updated Test Plan
Updated Schedule

Open Issues	**Resolved Prior to Next Stage? (Y/N)**
None	

Comments: Payment of invoices signified acceptance of the deliverables. Authorization and subsequent Task Work Orders signifies notice to proceed.

Project Team Members

Name	**Signature**
Peter McGilvray	

Outcome: (circle one)

Move to Next Stage

Resolve Issues Prior to Moving to Next Stage

Stage-end Walkthrough Form

Stage:	**Development**
Project Manager:	**Peter McGilvray**
Project Name:	**Environmental Screening Tool**
Date:	**August 29, 2008**

List each deliverable that was completed during this stage:

Implementation Plan (no changes)
EST Code for Enhancements (complete on DEV)
Development Team Test Results
Updated Test Plan
Updated Schedule
Stage-end Walkthrough Form

Open Issues	**Resolved Prior to Next Stage? (Y/N)**
None	

Comments: Payment of invoices signified acceptance of the deliverables. Authorization and subsequent Task Work Orders signifies notice to proceed.

Project Team Members

Name	**Signature**
Peter McGilvray	

Outcome: (circle one)

Move to Next Stage

Resolve Issues Prior to Moving to Next Stage

Stage-end Walkthrough Form

Stage:	**Development**
Project Manager:	**Peter McGilvray**
Project Name:	**Environmental Screening Tool**
Date:	**July 31, 2009**

List each deliverable that was completed during this stage:

Updated Implementation Plan
EST Code for Enhancements (complete on DEV)
Development Team Test Results
Updated Test Plan
Updated Schedule
Stage-end Walkthrough Form

Open Issues	**Resolved Prior to Next Stage? (Y/N)**
None	

Comments: Payment of invoices signified acceptance of the deliverables. Authorization and subsequent Task Work Orders signifies notice to proceed.

Project Team Members

Name	**Signature**
Peter McGilvray	

Outcome: (circle one)

Move to Next Stage

Resolve Issues Prior to Moving to Next Stage

Stage-end Walkthrough Form

Stage:	**Development**
Project Manager:	**Peter McGilvray**
Project Name:	**Environmental Screening Tool**
Date:	**July 31, 2010**

List each deliverable that was completed during this stage:

EST Code for Enhancements (complete on DEV)
Development Team Test Results
Updated Test Plan
Updated Schedule
Stage-end Walkthrough Form

Open Issues	**Resolved Prior to Next Stage? (Y/N)**
None	

Comments: Payment of invoices signified acceptance of the deliverables. Authorization and subsequent Task Work Orders signifies notice to proceed.

Project Team Members

Name	**Signature**
Peter McGilvray	

Outcome: (circle one)

Move to Next Stage

Resolve Issues Prior to Moving to Next Stage

Stage-end Walkthrough Form

Stage:	**Development**
Project Manager:	**Peter McGilvray**
Project Name:	**Environmental Screening Tool**
Date:	**July 31, 2012**

List each deliverable that was completed during this stage:

EST Code for Enhancements (complete on DEV)
Development Team Test Results
Updated Test Plan
Updated User Handbook
Stage-end Walkthrough Form

Open Issues	**Resolved Prior to Next Stage? (Y/N)**
None	

Comments: Payment of invoices signified acceptance of the deliverables. Authorization and subsequent Task Work Orders signifies notice to proceed.

Project Team Members

Name	**Signature**
Peter McGilvray	

Outcome: (circle one)

Move to Next Stage

Resolve Issues Prior to Moving to Next Stage