**Test Script Template**

This document helps identify the common elements to test when deploying RedRose for the first time. Typically, once the DEMO environment is available with the customization and configuration requested, a run through of the functionality is needed to make sure there are no errors and the system works as expected. Once testing is completed, RedRose will push all software updates to the LIVE or PRODUCTION environment for use in the operation with real data. If new configuration or customizations are required, those will need to be applied and tested in the DEMO environment first before moving to LIVE or PRODUCTION.

You may need to modify the details in this template to match the requirements documented in your Specifications template. When you go through the functions below, mark “N” under the Meets Specifications column if there are issues and “Y” if there are no issues. If there are issues, please describe them in the comments section with detailed steps on how to reproduce the issue or a screenshot of the problem. All issues should be reported to RedRose technical support to fix or to clarify.

**Functions:**

1. Beneficiary Registration
2. Beneficiary Management
3. Distribution Planning
4. Distribution Tracking & Reconciliation
5. Feedback and Complaints
6. Surveys
7. Excel Reports
8. User Management
9. **Beneficiary Registration**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
| 1.0 | Mobile Phone Setup |  |  |
|  | Are you able to install the RRCollect app on your mobile phone? |  |  |
|  | Are you able to download the registration form from RRCollect? |  |  |
| 1.1 | Data Collection |  |  |
|  | Are you able to load the form, enter some details, complete the form, and submit it? |  |  |
|  | If applicable, please check also: consent, GPS capture, taking photos, biometrics capture, dropdown values particularly for geolocations, and conditional logic. |  |  |
|  | After submitting the form and uploading to the server, are you able to see the new registration in the web portal?Review the details of the registration data in the web portal to make sure all desired data has been submitted. Check if you can download the beneficiary ID. |  |  |
| 1.3 | Beneficiary Dashboard |  |  |
|  | If there is a beneficiary dashboard configured, check if the number of beneficiaries are increasing after every successful submission? |  |  |
|  | Check if the other metrics you specified are updated in the dashboard? E.g. gender disaggregation, geolocation, vulnerability criteria. |  |  |

1. **Beneficiary Management**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
| 2.1 | Beneficiary Info Update |  |  |
|  | Some beneficiary info might be possible to update directly from the web portal on the beneficiary profile page, such as Status. Check if this works. |  |  |
|  | Some beneficiary info might be updatable using Excel upload (this is applicable for bulk updates also). Check if this works. |  |  |
|  | If applicable, some beneficiary info may need to be updated in the field using RRCollect, if so check if you can use an update form in RRCollect to update a piece of information regarding the beneficiary. |  |  |
| 2.2 | Beneficiary Search, Sort, & Download |  |  |
|  | From the beneficiary list page, check if you are able to search based on criteria from the dropdown box. |  |  |
|  | Check if you are able to download the beneficiary list. |  |  |
|  | Check if you can sort the beneficiary list by clicking on the column titles. |  |  |
| 2.3 | Duplicate Check |  |  |
|  | Using the duplicate check widget, test simple scenarios to detect duplicate entries. |  |  |
|  | Check the report to see if possible duplicate entries based on criteria were flagged. |  |  |
| 2.4 | Beneficiary Group |  |  |
|  | Check if you can create a new beneficiary group and add beneficiaries based on filters. |  |  |
|  | Check if you can add new beneficiaries to an existing group. |  |  |
|  | Check if you can remove beneficiaries from an existing group. |  |  |
|  | Check if you can download the beneficiary ID’s of the people in the group. |  |  |

1. **Distribution Planning**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
| 3.1 | Donor and Funds Creation & Approval |  |  |
|  | Check if you can create a new donor and fund and link them. |  |  |
|  | Check if you can allocate money on the fund. |  |  |
|  | Check if a finance person or approver is able to approve the funding amount. Fund amount should be updated after approval. |  |  |
| 3.2 | Vendor (FSP) setup - for mobile money |  |  |
|  | Setup vendor profile and the distribution mechanism (e.g. 3rd party integration for mobile money). |  |  |
|  | If applicable, check if the vendor user given their credential is able to login to the RedRose web portal. This will be needed if they have to download the distribution list from the platform and to upload the updated list after the distribution. |  |  |
|  | If applicable, check if you can download the Vendor ID card (for logging in to the RRApp) if vendors will be scanning barcodes or for e-vouchers. |  |  |
| 3.3 | Activity Creation & Approval |  |  |
|  | Check if you are able to create a new Activity, link with a fund and donor, link with the distribution mechanism (i.e. vendor), and allocate an amount for distribution. |  |  |
|  | Check if a finance person or approver is able to approve the activity request and associated funding allocation. |  |  |
|  | Check to make sure you are not able to request more money than what is available in the fund. |  |  |
|  | Check if you are able to increase allocation of funding in the activity (provided there is sufficient fund available). |  |  |
|  | Check if you are able to return unnecessary allocation from the activity back to the main Fund. |  |  |
| 3.4 | Top-up  |  |  |
|  | Within an activity, associate a beneficiary group and top-up the group with a desired amount. |  |  |
|  | Check to make sure you are not able to top-up with amount more than what is available in the activity. |  |  |
|  | If applicable, test that you can use the Individual top-up. This feature should be used in very controlled cases. |  |  |
|  | Check if a finance person or approver is able to approve the Top-up request. Afterwhich, you should be able to download the distribution list of beneficiaries and the barcodes for distribution. |  |  |

1. **Distribution Tracking & Reconciliation**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
| 4.1 | Generation of Beneficiary List & Printed Barcodes |  |  |
|  | In addition to downloading the beneficiary list and distribution barcodes from the Finance Requests page as tested in the section above, you can also check if you can download these two files from the Activity page itself under group or individual top-up (depending on which one was used).  |  |  |
|  | If applicable, login as a vendor and try to download the beneficiary list for distribution. |  |  |
|  | Make sure the printed barcodes and beneficiary list can only be downloaded by people with the right permission. Check the User Role Assignment. |  |  |
| 4.2 | Setup of Mobile App (RRApp) |  |  |
|  | Are you able to install the RRApp on your Android mobile phone? You may also need the barcode scanner app and ensure GPS is enabled, if applicable. |  |  |
|  | Check if you are able to login to the app by first entering the credentials then second by using the user ID, which can be downloaded from the web portal. Note that you can login as a vendor or a staff/volunteer and you will have different menu options available. |  |  |
|  | Check that you are able to synchronize the RRApp with the RedRose server to get the latest data. |  |  |
| 4.3 | Distribution |  |  |
|  | Depending on the type of distribution that may need to use the RRApp: (1) barcode scanning - test that you can scan a barcode for distribution generated from the Activity Topup. (2) e-vouchers or smartcards - test that you can associate smartcards with beneficiaries, that you can tap the smartcard on the phone via NFC to see the beneficiary status and conduct e-voucher transactions. Make sure to synchronize at the end of the day so all transactions are uploaded in the server. |  |  |
|  | For semi-integration, vendors will need to download the beneficiary list directly from the web portal or the programme manager sends it to them. That list will need to be updated by the vendor with the status of distribution. And either send back to the programme manager to upload back into the system, or for the vendor to directly upload to the system using their own credentials. The latter is recommended. Once upload is done, check if the status of beneficiaries are reflected. |  |  |
|  | If there are unclaimed amounts, try to return the unused amount from the Activity back to the main Fund, to close the activity. |  |  |
|  | If there are unclaimed amounts and the programme team wants to reallocate those funds to new beneficiaries, test the reversal of funds from the original beneficiaries and do another top-up to only the new beneficiaries in the same activity. |  |  |
| 4.4 | Distribution Dashboard |  |  |
|  | After each successful distribution, check if the metrics in the Distribution Dashboard is updated. If there are other metrics requested, please see if they are updated also. E.g. geolocation, total cash distributed, total number of HH or beneficiaries, distribution by hour or day, etc. |  |  |
| 4.5 | Reconciliation |  |  |
|  | After updates are sent by the vendors, check the status of the distribution by downloading the Excel report to see who has not yet received their entitlements and who has. Check if anyone received more than what was planned. |  |  |

1. **Feedback and Complaints**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
| 5.1 | Recording Feedback or Complaint |  |  |
|  | If using RRCollect, download the feedback form and test it.  |  |  |
|  | For anonymous feedback, no need to identify the beneficiary. But if feedback needs to be linked to a beneficiary, the beneficiary ID generated from the web portal will need to be scanned first. |  |  |
|  | If inputting directly on the web portal, can add the feedback from the beneficiary profile or from the Complaints/Feedback module. Test both. |  |  |
| 5.2 | Following up and Updating Status |  |  |
|  | Go to the Complaints/Feedback module and filter by status. Go to one of the feedback or Export the list for investigation. |  |  |
|  | Go to one of the beneficiary profile with an open feedback and update it directly. |  |  |

1. **Surveys**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
|  | For new surveys including Market Monitoring, Exit Survey, PDM, Attendance or Monitoring survey, Sector specific surveys, etc. you will need to provide the questionnaire to RedRose technician to upload to the system and configure it so the data is linked to the beneficiary profile, where applicable. Check that the form could be downloaded in the RRCollect app. |  |  |
|  | Test the data collection using the survey and upload to the server. Check if the survey is linked with the beneficiary or the entry is available from the RRCollect module. |  |  |
|  | If there was a request do a dashboard for the survey (e.g. PDM), check that the data is updated in the dashboard when new surveys are submitted. |  |  |

1. **Excel Reports**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
|  | Provide what types of reports you may need to download. Including the status of each distribution per Activity or Fund. Then check if those excel reports match your requirements. |  |  |

1. **User Management**

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| **#** | **Functionality** | **Meets Requirement? (Yes, No)** | **Comments*****Describe issue and steps to reproduce*** |
| 8.1 | Create new user role assignment |  |  |
|  | Create the user role assignments you need. This will be based on the roles and the access levels you want for those roles. E.g. Finance should just be able to approve Fund, Activity budget allocation, and Topups, but not download or browse beneficiaries nor request for funds by themselves. Same for programme managers, can only request but not approve. For managers, may want to give readonly access or dashboard access only. |  |  |
|  | If a specific role is needed to be associated with a user role profile, that may need to be created first then associated to the user role profile. E.g. access to dashboards only. |  |  |
|  | The superuser role should be created already. Check if the user with that role is able to access the audit logs. |  |  |
| 8.2 | Create new user |  |  |
|  | Test the creation of a new user and assign the user to a role assignment. |  |  |
|  | Provide the user credentials to the individual including the temporary password and guidance on changing the password. Please remind users not to share their credentials to others for data security reasons. |  |  |