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UAT with exploratory testing: explore instead of ticking off

How the business unit checks the software with test charters, tours and a fixed time box. With entry gateway, the flow of a round and a template for the test charter.

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THE PRINCIPLE

How the business unit tests

Acceptance tests often turn into ticking off scripts. It can be different: the business unit gets a test charter and uses it to explore the parts of the application that matter in daily work.

- **Test charter instead of script.** Every session has a goal, a test object and a fixed time, for example 45 minutes.
- **Business unit in charge.** At least two people test together, one knows the application very well. This is how knowledge is passed on.
- **Test tours for inspiration.** A tour gives the session a direction, for example asking users which parts of the software should be tested especially well.

From test start to the line organisation

UAT is an iterative process: the business unit tests in rounds, defects go back to development, ideas for improvements wait until after go-live.

START	BUSINESS UNIT	CHECK	APPROVAL	AFTERWARDS
Entry gateway	**UAT rounds**	**Retest**	**Go-live**	**Line organisation**
Five criteria are met	Test charters, round by round	Fixed defects are confirmed	The release goes into production	Operations and further development

> **Defects** are raised as a defect ticket, development fixes them, then the retest follows. **Improvements** are collected, not pushed into the running release, and taken up after go-live in the line organisation as a regular requirement.

ENTRY GATEWAY

Before the business unit tests

The business unit should not find defects that an automated test would have found long ago. That is why UAT only starts when five criteria are met.

- The test environment is available.
- The test data is in place.
- All BDD tests pass.
- There are no defects of priority high or highest.
- The first exploratory test charters have been created.

The test charter: example “Getting to know the application”

Every test charter describes on one page what is tested, for how long and from which angle.

Field	Example
Time box	45 minutes
Test object	Creating, changing and cancelling a contract, single-contract view, inbox
Functional area	All screens and the inbox
Quality attribute	Usability
Test tour	Pub tour: ask users which parts of the software should be tested especially well
Tester role	User of the software
Goal and approach	Get an overview of the functional scope. At least two people, one knows the application very well. Knowledge is passed on for further test charters.
Test data	Described on a separate page and linked in the test charter

TEST TOURS

Nine tours for the angle of view

A tour gives the test charter a direction. The names come from the literature on exploratory testing. For each test charter we choose one or two tours.

Landmark tour

Go through the most important functions one after another, in changing order.

Money tour

Check the functions the software is mainly used for.

Intellectual tour

Push the limits with invalid, extreme or very large data.

FedEx tour

Follow data on its way, from creation through change and storage to use.

Back-alley tour

Test rarely used functions, also in combination with frequently used ones.

Bad-neighbourhood tour

Watch the areas with the most past defects especially closely.

Rained-out tour

Start long-running operations, cancel them and check whether they can be resumed.

Antisocial tour

Act against the logic of the application: wrong data, rule violations, steps in the wrong order.

Pub tour

Ask users which parts of the software should be tested especially well.

How to choose tours

> For the charter “Input validation”, the Intellectual and Antisocial tours fit. For “Data consistency in pending cases”, the Rained-out and FedEx tours are suitable. To get started with an unfamiliar application, the Landmark and Pub tours help.

TEST CHARTERS

Charters for the typical risks

From experience with contract administration systems, nine test charters have proven their worth. They can be transferred to other applications.

Test charter	Guiding question
Getting to know the application	Get an overview of screens, functions and processes.
Different window sizes	How does the application behave when the window gets smaller or larger?
Browser behaviour	Do the back button, new tabs and refresh work as expected?
Input validation	How does the application react to wrong, empty and unusual input?
Data consistency in pending cases	Does data stay consistent when a case is interrupted and resumed later?
Simultaneous editing	What happens when two people edit the same case at the same time?
Permissions	Does every role see and do exactly what is intended?
Resuming an edit	Can an interrupted edit be continued without loss?
Connection to neighbouring systems	Does data arrive correctly in connected systems?

THE PROCESS

One round in five steps

1. **Agree briefly.** Who runs which test charter?
2. **Test.** The group explores the application within the set time.
3. **Present the result.** Each group briefly presents what it found.
4. **Decide.** The group decides what is raised as a defect ticket and discusses next steps.
5. **Next iteration.** The next round starts with new or repeated test charters.

What happens next, depending on the result

Result	Next step
Too little time	Restart the test charter and look at other areas.
Found a defect	Restart the test charter with the aim of finding further defects there.
Found no problems	Choose a different exploratory test charter.

AFTER THE TEST

Fix defects, move improvements to the line

In UAT the business unit finds two kinds of results: defects and ideas for improvements. They are handled differently.

Defects: retest before approval

1. The defect is raised as a defect ticket and rated by priority.
2. Development fixes the defect.
3. In the retest the business unit checks that the defect is fixed.
4. Only then is the release approved.

Improvements: after go-live

1. The business unit records the idea as an improvement suggestion, separate from the defects.
2. The running release stays unchanged, its scope stays stable.
3. After go-live the suggestion is taken up in the line organisation as a regular requirement and prioritised.

Only what goes wrong is documented

The business unit should test, not write protocols. That is why the documentation effort stays small.

- For each test charter and tester, a test execution is started directly from the test case and named with the test case name and the tester.
- In the test step only the failure is recorded: copy the table from the step and complete the “actual result”.
- On a failure the status is set to FAIL. Defects found are raised as defect tickets after the session.

BENEFITS AND TOOLS

What you get

Acceptance and fun
The business unit shapes the charters and stands behind the result.

Defects from daily work
Exploratory tests find what is in no script.

Knowledge transfer
Whoever knows the application passes on their knowledge in the session.

Low effort
Only failures are recorded, sessions are short.

Traceable
Test charters, executions and defect tickets live in the test management tool.

Ideas are not lost
Improvement suggestions go to the line organisation after go-live.

Tools and template

Typically Jira and Xray or SAP Cloud ALM are used for test charters, test executions and defect tickets. The approach can be transferred to other test management tools. You will find the template for the test charter (Word) on the same page as this guide.

> All product and brand names mentioned belong to their respective owners. This guide describes a proven approach and does not replace project-specific test planning. As of November 2026.

Let’s talk about your acceptance test

Briefly describe your situation. We will get back to you with a first assessment.

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