



Standard System Testing Checklist

Client Name:

Project # & Name: #

Version No:

Build No:

Tested By:

Test Date:

Signed Off By:

Sign Off Date:



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Preparation

- Has realistic test data been created that will test all conditions?
- Are you working with the latest version of the database?
- Are you working with the latest version of the specs?
- Are you working with the latest copy of the documentation?
- Are you working with the same version of FileMaker Pro/Server as the client?

User Interface - Layouts

- Does every field have the correct field label?
- Are text labels properly aligned? (Check all layouts — including find layouts and pop-up windows.)
- Are buttons properly aligned? (Check all layouts — including find layouts / pop-up windows / tab-panels)
- Is the tab order correct? (Check all layouts — including find layouts and pop-up windows.)
- Is the field behaviour set correctly (ex. in case a return should be used to go the next field)?
- Are there any layouts that are not required and need to be deleted?
- Have you checked for consistency in layouts? (e.g. buttons in same position, text colour, etc. Check all layouts — including find layouts and pop-up windows.)
- Are field formats consistent? (e.g. are all date fields formatted the same, e.g. Jan 26, 1999? Check all layouts — including find layouts and pop-up windows.)
- Are all portals consistent in terms of usability and look and feel?
- Are there any layouts showing in the layouts menu that should not be?
- Is the Status Toolbar locked and hidden? (might not apply)
- Have fields been assigned the correct value lists?
- Have tooltips been tested?
- Are there tooltips/script triggers assigned to objects that don't require them or that are assigned incorrectly?
- Have all script triggers been tested to make sure they work correctly?
- Does conditional formatting work correctly (and are its calculations commented properly where applicable)?
- Has spell checking been disabled for fields where it's not applicable (ex. key fields)?
- Is quick find enabled only on the fields that it should be enabled for?

User Interface – Dialog Boxes

- Have you checked for consistency?
- Are fields aligned properly, and tab order correct in Find dialogs?
- Do the messages that appear in dialogs clearly explain to users what is wrong and what they should do to correct their mistake?

User Interface - Buttons

- Has each button been checked to make sure it performs the correct script or action?
- If the button runs a script, has the script been tested (and does it use named parameters)?
- If a button copies data (e.g. address) to the clipboard has this been tested?
- Have buttons that send email or link to a web page been tested?
- Have buttons that insert date and/or user name in a notes field been tested?
- Have tab panels been tested to ensure the default tab has been set?

Field Definitions

- Have calculation fields been checked to ensure the resulting calculations are correct?
- Do field names conform to our standards and naming conventions?
- Have all fields that require validation been tested? (Note: Check the specs for validation rules)
- Has strict validation been selected for value lists that require it? (See specs for validation rules.)
- Have you checked that fields using centrally stored value lists (as in Defaults file) are assigned the proper value list and not an old local version?

Value Lists

- Have all required Value Lists been defined?
- Have any Value Lists been defined that are not needed, that can be deleted?
- Are custom value lists that the user can edit, stored in a separate file that will not require updates over time?
- Have value lists using relationships (that might perform slowly) been avoided? (use of the relationship in the value list can typically be circumvented by use of a calculation field)

Relationships

- Have all relationships been checked to ensure that the 'allow deletion of related records' check box is correct and is only set for base table occurrences?
- Is the Primary Key based on a table code and an auto-enter serial number and non-modifiable?
- Do the Primary Key and Foreign Keys have the same field type?
- Do table occurrences conform to our standards and naming conventions?
- Have all possible portal filtering conditions been tested for?

Scripts

- Does each script begin with our standard comment block?
- Is the comment block up to date?
- Are there scripts listed in the Scripts menu that should not be?
- Have Startup scripts been tested thoroughly?
- Have Shutdown scripts been tested thoroughly? Does closing one file or the main file close the rest of the files in the system?
- Have you checked to ensure (where possible) the found set is not changed after a script runs?
- If this is a script the user should not be permitted to cancel — has the User Abort Off step been included/Is the window's close box disabled?
- Do all scripts conform to our naming standards and conventions?
- Are there any scripts showing in the scripts menu that should not be?
- Have all script parameters been tested?
- Have global/local variables been tested?
- Have any steps been re-enabled if they were disabled for testing (and vice versa)

Scripted Finds

- Have all possible conditions been tested, e.g. no records found, 1 record found, multiple records found? (Note: Never allow the user to return to browse with a found set of zero records. Make sure to test every condition and button.)
- Can the script handle the entry of garbage search criteria? (e.g. garbage data in a date range?)
- If a find screen has related fields have you tested that the find works? (Note: Finding on a filtered relationship doesn't work.)
- If a find is unsuccessful does the current record remain the same? (Note: The user should always be returned to the same record and found set they were on if a find operation is unsuccessful.)

Custom Functions

- Have all custom functions been tested?
- Have exit conditions for recursive functions been tested?
- Do custom functions conform to our naming standards and conventions?

Custom Menus (if applicable)

- Have all items in all custom menus been tested?
- Have scripts, which set custom menus, been tested?
- Have all scripts being run from custom menu items been tested?
- Do custom menu items use dynamic naming to reflect the current module (ex. Instead of 'Delete Record' it might say 'Delete Company') (only pertains to advanced systems)
- Has the 'Show All Records' menu item been replaced with a find (pertains to solutions where users might not have security access to view all records)

Reports

- Have all reports been printed?
- Have you checked for consistency? (e.g. date formats, page formats, positioning of elements)
- Are totals in sub-summary parts correct?
- Are final report totals correct?
- Are page breaks correct? (Note: There should be enough data in the file to generate at least two pages, unless it's a summary report that doesn't have a Body part.)
- Are the correct records printing on the report? (e.g. If you were printing an outstanding invoices report you need to ensure that there are records in the database that will be selected for the report.)

- Have the page setup options been stored properly (and set using a subscript)?
- Has the report layout been defined to have fixed margins for printing?

Access Privileges

- Have privilege sets been set up as documented in the specs?
- Have user accounts / External Authentication Groups been set up as documented in the specs?
- Are users allowed master access to the files? (Check with the Project Manager.)
- Is access allowed by versions previous to 11
- Is the option to only allow authorized files to access data turned on (FM11 feature)?

Cross Platform

- Is the appearance consistent on both platforms?
- Is the usability of the system the same on both platforms?
- Have all labels and text elements on layouts been checked to ensure they do not wrap? (printing should be tested cross platform to avoid font size issues etc.)
- Have special operations or unique features been tested? (unique functionality ex. → using VBScript for emailing)

Networking

- Have you tested features that may not be network friendly? (e.g. dynamic value lists, temporary storage of records to facilitate an import/export or report.)
- Has Sharing been set correctly on all files?
- Are checkboxes or radio buttons being used in a solution that will be used over RDP? (these features work very slowly over RDP)

Specifications

- Have you reviewed the specs and tested each requirement to ensure it has been implemented and is working correctly?
- If applicable, have you cycled through, day-end, month-end and year-end processes documented in the specs?

Other Software

- If plug-ins are being used — have they been thoroughly tested? (Are auto-update procedures working... and was the latest version of the plugin sent to the client?)
- If there is interaction with other technologies or the operating system, have they been thoroughly tested?

Usability

- Is the system easy to use?
- Is it easy to navigate between the various layouts?
- Do the names on the buttons adequately describe the action of the button?

Documentation

- Have you read the documentation and checked it for correctness?
- Are the screen shots up to date?



Pre-Installation Testing

- Is the information on the Splash and About layouts correct? (e.g. Product Name, ISBN #, version #, date, etc.)
- Has all test data been deleted from the files. (All files, with exception possibly of the Defaults file should have no records.)
- Have all auto-enter serial numbers been set to their proper initial values. (Note: In most cases this will be 1.)
- Have the users tested the system with production data?

Installation

- If an installation procedure is required that is to be performed by the developer, have you documented and tested that procedure (ex. Data migration from old system)?

Installer (rarely used)

- Does the installation perform correctly?
- If this is a cross platform solution have both installers been checked?
- If any special files or fonts were to be installed, have you checked to see that they were installed in the correct location?
- If a license agreement is required does it display at the beginning of the installation process?