

Milestone 2 UAT Checklist For Business Reviewers

Who This Is For

This checklist is for:

- business analysts
- product stakeholders
- internal reviewers
- external reviewers

You do not need technical knowledge to use this checklist.

What You Are Reviewing

The Milestone 2 build is designed to answer one main question:

Can the system accept a Word document, evaluate it against the correct Word template profile, analyze it, and clearly show whether it is ready, needs review, or should be corrected in Word first?

For Milestone 2, the system is expected to:

- accept Word `.docx` files
- let users select the correct Template Profile before upload
- show and manage Template Profiles with uploaded Profile Base Documents
- analyze structure, tables, figures/images, lists, references, and citations
- show a top-level result of `Pass`, `Warning`, or `Reject`
- flag citation/reference issues for review
- show external citation-validation results

For Milestone 2, the system is not yet expected to:

- let users fix citations in the app
- let users edit references in the app
- provide a final editorial remediation workflow

Test Environment

- Website: <http://138.197.33.233:8080>
- Template Profiles page: <http://138.197.33.233:8080/template-profiles>
- Upload page: <http://138.197.33.233:8080/upload>

Template Profiles To Confirm

Before uploading documents, confirm these profiles are active on the Template Profiles page:

- `NCBI Author Template Advanced with base document author_template_advanced.docx`
- `OAR Guidelines Template v4 with base document 1 Updated Clinical Guidelines Template_v4_for_NLM.docx`

The base document should appear as a link. The edit form should allow a replacement DOCX upload.

Profile-specific metadata expectation:

- `NCBI Author Template Advanced` should detect NCBI-style metadata tables when they are present.
- `OAR Guidelines Template v4` does not require NCBI-style metadata or keywords. Missing metadata/keywords alone should not create a pre-flight issue for OAR guideline uploads.

Documents To Use

Use these OAR files from the Gold Standard Word Templates Google Drive folder with OAR Guidelines Template v4 selected:

- 2 virologic-failure-adult-adolescent-arv.docx
- 3 antiretroviral-therapy-cost-considerations-adult-adolescent-arv.docx
- 4 management-infants-utero-intrapartum-breastfeeding-hiv-exposure-perinatal.docx
- 5 human-papillomavirus-disease-adult-adolescent-oi NLM.docx
- 6 bacterial-enteric-infections-adult-adolescent-oi NLM.docx
- 1 Updated Clinical Guidelines Template_v4_for NLM.docx

Use these NCBI Author Template Advanced files with NCBI Author Template Advanced selected:

- Acarbose.docx
- celecoxib.docx

Expected Overall Results

These are the current expected top-level outcomes:

- File 2: Pass
- File 3: Warning
- File 4: Warning
- File 5: Pass
- File 6: Pass
- File 1: special baseline/template file; it may show Reject and that is acceptable for this phase
- Acarbose.docx: parses with the NCBI Author Template Advanced profile snapshot
- celecoxib.docx: parses with the NCBI Author Template Advanced profile snapshot and citation/reference review data
- OAR guideline files should not be warned or rejected only because NCBI-style metadata tables or keywords are absent

Business Review Checklist

For each document, answer each item with:

- Yes
- No
- Needs discussion

1. Template Profile Setup

- Were the expected Template Profiles visible?
- Did each active profile show a Profile Base Document link?
- Was there an Edit button for each active profile?
- Did the edit form show an optional replacement DOCX upload?

2. Upload Experience

- Was it easy to find where to upload the document?
- Was it clear that the system expects a Word .docx file?
- Was the Template profile selector visible and understandable?
- Did you select the correct profile for the document family?

- After upload, were you taken directly to the review result?
- Did the review page show the selected Template Profile in document metadata?

3. Top-Level Decision

- Was the top-level result easy to see?
- Was the result label understandable?
- Pass
- Warning
- Reject
- Did the result feel reasonable for the document you uploaded?

4. Overall Review Clarity

- Could you tell what the system parsed from the document?
- Could you understand the summary counts shown on the page?
- Did the page feel like a useful review tool rather than a technical debug screen?

5. Tables, Figures, Lists, And Structure

- If the document contains tables, were they shown clearly as tables?
- If the document contains figures/images outside tables, were they visible as figures/media?
- Did images inside tables remain part of the table context?
- Could you distinguish body text from tables, figures, and lists?
- Did unordered or nested lists remain understandable?

6. References

- Could you find the extracted references section?
- Was it understandable which references were found?
- If a reference looked incomplete, was that visible on the page?

7. Citations

- Could you find the citation review section easily?
- Was it understandable whether citations were matched or needed review?
- Could you tell the difference between:
 - a citation found in the document
 - a citation matched to a reference
 - a citation with an external validation issue

8. Citation Validation Visibility

- Were citation validation outcomes easy to understand?
- If a citation showed `Ambiguous` or `Not found`, was that visible?
- Did the page avoid implying that those items can already be fixed inside the app?

9. In-Text Citation Navigation

- Could you click an in-text citation and reach the citation review area?
- Did the highlighting help you understand citation status?

- Was the highlighting useful rather than distracting?

10. Warning Cases

Use File 3 and File 4 for this section.

- Did a warning result still feel reviewable and usable?
- Were the warnings understandable?
- Did the warnings read like items to fix in Word, rather than a broken system?

11. Template/Baseline File

Use File 1 for this section.

- Was it understandable that this file is a template/baseline artifact rather than a normal submission?
- If the result looked like a rejection, did that still make sense in context?

Reviewer Questions

Please capture short answers to these questions:

- What worked well?
- What was confusing?
- What labels or wording should be simplified?
- Did anything feel missing for a reviewer at this stage?
- Did anything you wanted belong more naturally in a future editing/correction phase?

How To Classify Feedback

Use these categories when recording feedback:

Milestone 2 blocker

Use this when:

- upload fails
- Template Profile selection or routing is wrong
- the review page is unusable
- tables, figures, references, or citations cannot be reviewed properly
- the top-level decision is clearly wrong because of a major system failure

Milestone 2 improvement

Use this when:

- wording is confusing
- a warning is unclear
- a section is hard to scan
- the review is usable but could be clearer

Milestone 3 request

Use this when the feedback is really asking for:

- editing unmatched citations
- editing references
- correcting metadata inside the app

- approval/remediation workflow
- manual override features

Suggested Sign-Off Question

At the end of review, ask:

Would you feel comfortable using this Milestone 2 build to review uploaded Word documents and identify whether they pass, need warning-level follow-up, or should be corrected before acceptance?

If the answer is yes, Milestone 2 is in a strong position for UAT sign-off.