

Milestone 2 UAT Handout

Purpose

We are testing whether the Milestone 2 build can accept a Word document, evaluate it against the correct Template Profile, analyze it, and clearly show whether it:

- Passes
- Needs warning-level follow-up
- Should be corrected in Word first

Audience

This handout is intended for:

- internal stakeholders
- business analysts
- QA reviewers
- external reviewers

No technical background is required.

Test Site

- Site: <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>

What Milestone 2 Should Do

The system should:

- accept Word .docx files
- allow users to select the correct Template Profile for the source document
- show Template Profile base documents as links and support replacement base-document uploads
- parse structure, tables, figures/images, lists, references, and citations
- show a clear result of Pass, Warning, or Reject
- highlight citation/reference concerns for review
- show external citation-validation results to the reviewer

What Milestone 2 Does Not Yet Do

The system does not yet provide:

- in-app citation correction
- in-app reference correction
- manual editorial override workflow
- final remediation workflow

Those items are planned for Milestone 3.

Documents To Review

Use the files in the Gold Standard Word Templates folder with OAR Guidelines Template v4 selected.

Expected current outcomes:

- File 2: Pass
- File 3: Warning
- File 4: Warning
- File 5: Pass
- File 6: Pass
- File 1: template/baseline file; a Reject outcome is acceptable in this phase

Also test `Acarbose.docx` and `celecoxib.docx` with NCBI Author Template Advanced selected.

Reviewer Checklist

Please answer Yes, No, or Needs discussion.

- Were the expected Template Profiles visible?
- Did each profile show its Profile Base Document as a link?
- Was the upload process easy to understand?
- Was the correct Template Profile selected before upload?
- Did the review page show the selected Template Profile?
- Was the top-level result (Pass, Warning, Reject) easy to see?
- Did the result feel reasonable for the uploaded file?
- Could you understand what the system parsed from the document?
- If the document contained tables, were they shown clearly as tables?
- If the document contained figures/images, were they handled clearly?
- Could you review references and citations without needing technical help?
- Were citation validation results understandable?
- If a citation was Ambiguous or Not found, was that visible?
- Did warning cases still feel usable and reviewable?
- Did the system make clear what would need to be fixed later rather than now?

Feedback Categories

Please classify comments as one of these:

- Milestone 2 blocker
- the upload or review process does not work
- the wrong Template Profile is used or displayed
- Milestone 2 improvement
- the review works, but wording or presentation should improve
- Milestone 3 request
- the feedback is asking for editing, correction, override, or workflow features not yet in scope

Final Sign-Off Question

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