

# Milestone 2 UAT Script

## Purpose

This script is for QA analysts and business analysts validating the Milestone 2 hosted build of the NCBI Word ingestion app.

The goal is to confirm that the app supports the intended Milestone 2 reviewer workflow:

- manage Template Profiles with Word base documents
- upload DOCX source files with the correct Template Profile selected
- parse structure, metadata, tables, figures/images, references, and citations
- inspect references, citations, and external validation outcomes
- review top-level Pass / Warning / Reject decisions
- confirm each document was evaluated against the intended template rules

## Environment Under Test

- Environment: production UAT
- URL: <http://138.197.33.233:8080>
- Template Profiles page: <http://138.197.33.233:8080/template-profiles>
- Main upload page: <http://138.197.33.233:8080/upload>
- Review page: <http://138.197.33.233:8080/review>

## Template Profiles Under Test

Before uploading UAT files, open <http://138.197.33.233:8080/template-profiles> and confirm these active profiles are present:

Template Profile	Base Document	UAT Source Documents	Expected Profile Snapshot
NCBI Author Template Advanced	author_template_advanced.docx	Acarbose.docx, celecoxib.docx	ncbi-author-template-advanced
OAR Guidelines Template v4	1 Updated Clinical Guidelines Template_v4_for NLM.docx	OAR guideline chapters including File 2 and File 5	oar-template-v4

For each profile, confirm the Profile Base Document appears as a download/view link. Editing a profile should allow the reviewer/admin to replace the base document by uploading a new DOCX.

Profile-specific metadata expectation:

- NCBI Author Template Advanced should exercise NCBI-style metadata table detection when those tables 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.

## Test Data

Use the following gold-standard OAR files from the shared Google Drive folder [Gold Standard Word Templates](#).

Core OAR UAT files:

- 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

Special OAR baseline file:

- 1 Updated Clinical Guidelines Template\_v4\_for NLM.docx

NCBI Author Template Advanced UAT files:

- Acarbose.docx
- celecoxib.docx

## Expected Current Outcomes

These are the expected current high-level outcomes for Milestone 2 scope:

- File 1: Reject or template-contract failure behavior is acceptable and should be interpreted as a baseline/template artifact, not as a manuscript failure
- File 2: Pass
- File 3: Warning
- File 4: Warning
- File 5: Pass
- File 6: Pass
- Acarbose.docx: parses with the NCBI Author Template Advanced snapshot
- celecoxib.docx: parses with the NCBI Author Template Advanced 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

## UAT Scenarios

### Scenario 1 - Template Profile Setup

Objective: Confirm that Template Profiles are visible, editable, and tied to base Word documents.

Steps:

- Open <http://138.197.33.233:8080/template-profiles>.
- Confirm NCBI Author Template Advanced and OAR Guidelines Template v4 are active.
- Confirm each profile shows a Profile Base Document link.
- Click an Edit button.
- Confirm the edit form shows Profile Name, Profile Base Document, and an optional replacement file upload.
- Return to the Template Profiles list.

Expected result:

- Profile Base Document links open or download DOCX files.
- Edit controls are visible for each active profile.
- The replacement upload is present but does not need to be used during normal UAT.

### Scenario 2 - Upload With Correct Template Profile

Objective: Confirm that the upload flow evaluates each DOCX against the selected template-specific rules.

Steps:

- Open <http://138.197.33.233:8080/upload>.
- Confirm the page allows DOCX upload.
- Confirm the Template profile selector is visible.

- Select OAR Guidelines Template v4 before uploading File 2.
- Upload File 2.
- On the review page, confirm the document metadata shows OAR Guidelines Template v4.
- Repeat with NCBI Author Template Advanced for Acarbose.docx or celecoxib.docx.

Expected result:

- Upload succeeds.
- The user is redirected directly to the review page.
- The review metadata shows the selected Template Profile.
- The stored profile snapshot slug matches the profile used for upload.

Pass/fail notes:

- Fail if the Template Profile selector is missing or confusing.
- Fail if the wrong profile is shown on the review page after upload.
- Fail if the user is not redirected to a usable review page after upload.

### **Scenario 3 - Review Decision Summary**

Objective: Confirm that the review page shows a clear top-level decision and summary counts.

Steps:

- On the review page for File 2, locate the decision banner.
- Confirm the page clearly reads Pass, Warning, or Reject.
- Confirm the summary shows counts for headings/blocks, references, citations, matched citations, blocking issues, and warning issues.

Expected result:

- The decision state is visible above the fold.
- Summary counts appear coherent and non-empty for a real manuscript.

### **Scenario 4 - Parsed Structure, Tables, Lists, And Figures**

Objective: Confirm that the app renders parsed document structure clearly enough for reviewer inspection.

Steps:

- Upload a document that contains tables or figures/images, such as the NYSDOH AI PEP document or a representative OAR file with tables.
- Review the parsed structure section.
- Locate table blocks.
- Confirm tables appear as first-class table objects rather than flattened prose.
- Confirm figures/images outside tables appear as figure/media blocks.
- Confirm unordered and nested lists remain list-like instead of plain paragraphs when present.
- Confirm images inside tables remain part of the table context and do not incorrectly become standalone figures.

Expected result:

- Tables are rendered as tables.
- Figure/image handling is visible for non-table media.
- The reviewer can distinguish narrative content, lists, figures, and tables.

### **Scenario 5 - Reference Review**

Objective: Confirm that extracted references and normalized reference metadata are visible.

Steps:

- In File 2, File 5, File 6, or `celecoxib.docx`, open the reference review section.
- Confirm reference order is shown.
- Confirm normalized reference text is shown.
- Confirm extracted metadata fields appear when available: authors, year, title, DOI, and PMID.

Expected result:

- References are reviewable without needing database-level knowledge.
- Missing extracted fields, when present, are visible as review signals rather than silent loss.

## Scenario 6 - Reference-Centered Citation Review And External Validation

Objective: Confirm that a reviewer can inspect local citation matching and external validation outcomes.

Steps:

- In File 2, File 5, File 6, or `celecoxib.docx`, open the `Reference list and validation` section.
- Confirm each reference row shows normalized reference text and extracted metadata.
- Expand matched or possible in-text citation details under a reference row.
- Confirm each reference row shows DOI, PMID, and PubMed/DOI validation status when available.
- Confirm explicit external outcomes can appear, such as `Validated`, `Probable`, `Ambiguous`, `Not found`, `Not applicable`, and `Pending`.

Expected result:

- The distinction between local match and external validation is understandable.
- `Ambiguous` and `Not found` are visible to the reviewer.
- The page does not imply that those items can already be corrected in-app.

## Scenario 7 - In-Text Citation Navigation And Highlighting

Objective: Confirm that parsed citations in the document body connect to the reference review section.

Steps:

- In File 2, File 5, File 6, or `celecoxib.docx`, inspect the parsed document body.
- Click one or more highlighted in-text citations.
- Confirm matched citations jump to their reference row and unmatched/problem citations jump to open citation issues.
- Confirm validated citations and review-needed/problem citations are visually distinguishable.

Expected result:

- Navigation works.
- Citation highlighting is visually consistent between the document body and reference review section.

## Scenario 8 - Warning-Grade Review Case

Objective: Confirm that a warning-grade manuscript remains reviewable and understandable.

Steps:

- Upload File 3 with `OAR Guidelines Template v4` selected.
- Confirm the result is `Warning` rather than `Reject`.
- Confirm there are no open citation issues for the earlier false date phrase.
- Review the warning list.

- Confirm the warnings are understandable as fix-in-Word items rather than fatal ingestion failures.

Expected result:

- File 3 is reviewable.
- The user is not blocked by the earlier false citation `As of April 30, 2025`.

## Scenario 9 - Template Contract / Baseline Artifact

Objective: Confirm that the team understands the baseline template file is not a normal manuscript UAT case.

Steps:

- Upload File 1 with `OAR Guidelines Template v4` selected.
- Observe the top-level outcome.
- Confirm with the BA/QA reviewer that the file is being interpreted as a template/baseline artifact, not as a normal chapter manuscript.

Expected result:

- The team records this as a baseline/template contract scenario.
- A rejection-like outcome is not treated as a Milestone 2 manuscript failure.

## Questions QA And BA Should Answer

For each scenario, capture answers to these questions:

- Was the result understandable to a non-developer reviewer?
- Did the top-level decision feel justified by the evidence shown?
- Was the selected Template Profile visible and correct?
- Were citations, references, tables, figures, and lists easy enough to inspect?
- Were any labels or statuses confusing or too technical?
- Did the page make clear what still requires Milestone 3 editing/remediation?

## Defect Logging Guidance

Classify findings into these buckets:

- `Milestone 2 blocker`
- `upload flow broken`
- `Template Profile selection or snapshot is wrong`
- `review page unusable`
- `citations/references/tables/figures not inspectable`
- `wrong top-level decision due to an obvious parser failure`
- `Milestone 2 warning-grade issue`
- `confusing label/copy`
- `localized parsing imperfection that does not block review`
- `external validation nuance that is visible but not yet editable`
- `Milestone 3 backlog`
- `requests for editing/correction workflows`
- `requests for manual overrides`
- `requests for richer editorial history or remediation actions`

## Suggested UAT Sign-Off Rule

Milestone 2 can be considered UAT-ready if:

- upload and review succeed for the core manuscript files
- the correct Template Profile is selected, displayed, and snapshotted for each template family
- expected `Pass` / `Warning` outcomes are reproducible
- citations, references, tables, figures, and lists are inspectable
- external validation outcomes are visible to reviewers
- no new manuscript-grade blocking parser failures are found