Automation Proof Pack

Check the outcome of one automated job.

A request can be accepted while a later step fails. Use this pack to record four separate checks before deciding that a job is complete. Apply it to a test enquiry, a scheduled report or another small workflow with a clearly defined result.

Four stages, four kinds of proof

Stage	Evidence to look for	What it does not prove
1. ACCEPTED	The intended system received this request, with a matching test reference and time.	The worker ran or the result was saved.
2. EXECUTED	The worker reached the expected final state for this request. Inspect any failed or skipped steps.	Every downstream action succeeded.
3. PERSISTED	Read the intended record or file back from its destination. Check its identity and required values.	A notification arrived or someone acted on it.
4. DELIVERED	Check the required destination or receipt for this result, within the agreed time window.	A human read it, understood it or completed a follow-up.

These are proof categories, not a required technical order. A workflow may branch. If it must save a record and send a notice, check both. An HTTP success response, a green dashboard or a process starting is only evidence for the step it actually measures.

Set up a controlled test

Agree before testing	Record privately
The intended outcome	One sentence, required destinations and the completion deadline
The permitted test	Invented details, business-owned destinations and an isolated test mode
The person responsible	Test owner, person allowed to stop or restore it, and review time

Do not replay an old live webhook or disable a production connection to create a failure. Ask the system owner to isolate anything that sends messages, creates bookings, changes records or causes charges. Keep customer data, credentials and sensitive payloads out of this pack.

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Trace one test from start to finish

Use one test reference across the available records. If a system assigns a new reference, record the link between them. Include the date, time and timezone so another person can find the same evidence.

Define this test

Field	Your record
Test reference / attempt	_____
Workflow / version / environment	_____
Expected business result	_____
Required destinations	_____
Start time / timezone / deadline	_____
Test owner / stop or restore owner	_____

Check each required stage

Stage	Actual result and evidence reference	Status
ACCEPTED	_____	_____
EXECUTED	_____	_____
PERSISTED	_____	_____
DELIVERED	_____	_____

PASS: the agreed result has matching evidence. FIX: evidence shows an incorrect result or missed deadline. NOT TESTED: evidence is missing or the check has not been completed. NOT APPLICABLE: the stage is outside this workflow's agreed scope; write the reason.

For more than one saved record or delivery destination, add a row for each in the CSV. A partial result stays partial. A queued message is not a delivered message, and a provider's delivery receipt may not prove inbox placement or human reading. State the level actually checked.

Use short evidence references. Keep the underlying records in your own approved storage. This worksheet records your assessment; it does not independently verify the evidence.

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Check failure and recovery paths

Run the ordinary successful case first. Then agree the relevant failure cases with the system owner. Use a sandbox, test fixture or supported simulation. Never break a live dependency just to test it.

Check	Controlled test	Evidence to inspect
Missing required input	Submit an invented request without one required field.	Rejection or agreed handling is visible. No unintended record or message is created.
Worker cannot finish	Simulate one failed step in an isolated run.	Failure is recorded, the responsible person can find it and no final success is claimed.
Repeated request	Repeat the same synthetic request only where the test is safe.	Record count and delivery count match the agreed duplicate-handling rule. Do not assume retries are harmless.
One destination fails	Simulate a saved record with an unsuccessful notification.	Saved and delivered states remain separate. The missing destination stays owned.
Evidence is absent or old	Review a run with a missing receipt or an expired evidence window.	It stays unverified. An unrelated green check does not close the failure.

If a required step fails

1. Mark the affected stage FIX or NOT TESTED, according to the evidence. Record the impact and keep the original attempt.

2. Name one owner and a review time. Stop unsafe repeat attempts. Check the destination before retrying so a retry does not create a duplicate.

3. Retest after the change with a new attempt and the current version. Link it to the original failure, then recheck the ordinary successful case.

4. Close only the matching failure that the new evidence resolves. A skipped check, a restarted process or an old success does not prove recovery.

Follow-up	Your record
Failure reference / impact / owner	_____
Next safe action / review time	_____
Retest reference / outcome	_____

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Make the decision explicit

Synthetic example: a saved enquiry with no confirmed notice

This invented example uses test reference DEMO-01. The agreed result is one saved enquiry and one notice in a business-owned test inbox within five minutes. It is not a result from a customer system.

Stage	Observation	Assessment
ACCEPTED	The request receipt matches DEMO-01 and the test time.	PASS
EXECUTED	The run finished; its notification step returned a failure.	FIX
PERSISTED	Read-back shows one test enquiry with the expected values.	PASS
DELIVERED	The test inbox has no notice after the deadline.	FIX

Decision: HOLD. The saved enquiry is useful, but the required notification has failed. The owner investigates that step, checks for a delayed or duplicate notice before retrying, and records a new attempt. A successful retest does not erase DEMO-01.

Your release or handover record

Decision field	Your record
GO / HOLD / LIMITED PILOT	_____
Approved scope / version / exclusions	_____
Decision owner / review date	_____
Monitoring / stop or restore owner	_____

Choose GO only when required results have current evidence. Choose HOLD when a required result is wrong, missing or untested. A LIMITED PILOT needs an explicitly reduced scope, tested fallback and an owner who accepts the remaining limits. A status count cannot make this decision for you.

Before closing: required destinations checked; unresolved items owned; monitoring assigned; retest or review date recorded. The pack is a working aid, not certification or a guarantee of business results.

Get the editable CSV evidence log. For phone workflows, use the AI Phone Go-live Test Pack.

Need help with a failing connection? View consultation options or send an enquiry.

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