

Case Management User Search Process Documentation

Overview

This document describes the process for validating assignee user search functionality within Case Management by editing an existing task and verifying searchable users.

Preconditions

- Access to Cozeva CERT or PROD environment
- Access to Case Management module
- Existing Case Management task available
- Predefined users available for assignment

Open Existing Case Management Task

1. Navigate to the Case Management module.
2. Open an existing case management task.

Edit Task

1. Click on the kebab (three-dot) icon at the top-right of the open task.
2. Select the Edit Task option.

Search User in Assignee Field

1. Navigate to the Assignee field.
2. Enter a predefined user name (as not all users are searchable).

Validate Search Result

1. Verify that the searched user appears in the assignee list.
2. Confirm that the displayed user name exactly matches the searched user.

Expected Outcome

The predefined user should appear in the Assignee list and exactly match the username used for the search.

