

Batch Share User Search Process Documentation

Overview

This document outlines the process for validating customer support users during the Batch Share workflow by searching and verifying users against the CustomerDB dataset.

Preconditions

- Access to Cozeva CERT or PROD environment
- Pre-created batch with patients available in Batch List
- CustomerDB dataset containing valid customer support usernames

Open Batch List

1. Navigate to the Batch List page.
2. Verify that a pre-created batch with patients is available.

Initiate Batch Share

1. Click on the menu icon corresponding to the selected batch.
2. Select the Share option from the menu.

Search User in Share Screen

1. Locate the user search field in the Share screen.
2. Enter a customer support username present in the CustomerDB dataset.

Validate Search Result

1. Verify that the searched user appears in the results list.
2. Confirm that the displayed username matches the searched username.

Expected Outcome

The searched customer support user should appear in the share user list and exactly match the username used for the search.

