**Open Bite: Full System Testing Plan**

7/29/2014

**Functions to be Tested**:

* SMS: Enrolling participants
* SMS: Activating participants
* SMS: Training participants
* SMS: Creating participant CICS accounts and notifying users
* CICS: Changing passwords
* CICS: Activating patients
* CICS: Uploading images
* CICS: Marking images as unavailable
* SMS: RC accept images
* SMS: RC rejects images
* SMS: RC indicates image cropping required
* SMS: Westat crops and uploads edited image
* SMS: Adding more patients
* SMS: Activating a new CICS account
* SMS: Deactivating a CICS account
* SMS: Extract images for export to PI

**Test Environment**

SMS demo environment.

Note the test PIDs and Patients on the worksheet.

The test system automatically intercepts emails and directs to configured tester email boxes. The test email indicates the email address it was ‘intended for’, to aid testing. Set all email templates to direct test emails to the testers.

All testing will be performed in the demo SMS/CICS site

CICS demo web site: **openbitedemo.wesdemo.com**

**Test Cases/Outline**: All testing will be performed on a single Location, single lead PID with multiple patients. One exception: at the end of the test, create participants at a location with two Leads and one Assist – test the CICS account access.

Choose a Location with at least 4 network members.

Note the Location and PID for this test

|  |  |
| --- | --- |
| Location |  |
| PID |  |
| Location-2: test multiple Leads |  |

|  |  |
| --- | --- |
| Test # | Scenario |
| S-1 | Enroll participants at a single location |
| S-2 | Activate lead practitioner, initialize patients |
| S-3 | Train participants |
| C-1 | Login to CICS, create new password |
| C-2 | Change Password |
| C-3 | Activate patients |
| C-4 | Upload images, mark one or more as unavailable, make one patient visit incomplete |
| C-5 | Upload image for incomplete visit |
| S-4 | RC rejects images, accepts images, indicates images need cropping |
| S-5 | Westat crops images and uploads and marks as verified |
| S-6 | Westat adds more patients |
| S-7 | RC creates new non-participating account for network member |
| S-8 | RC creates new account for a non-network member |
| S-9 | RC deactivates an account |
| S-10 | RC reactivates an account |
| C-5 | ‘Forgot Password’ for non-network member |
| C-6 | Upload image for rejected |
| S-11 | Export |
| C-7 | Upload images for next round for one or more patients – TIF and DICOM and JPG |
| S-12 | RC accepts images |
| S-13 | Export |
| S-14 | For a new Location with at least 3 PIDs, assign two leads and an Assist |

**Test Process**

S-1: Enroll participants at a single location

Process: Create one Lead, one Assist, one Consent in the Study Participation page.

Verification: Study Participation page should operate as usual.

S-2: Activate lead practitioner, initialize patients

Process:

* Go to Open Bite Study Tracking for the lead practitioner
* Activate and indicate ‘1’ additional Patient

Verification:

* Study Tracking screen should show the practitioner status = ‘Active’
* Patient Grid should show 6 patient records (5 + 1 additional)
* Email generated to DM indicating PID is active
* CRF Shipping report should indicate 6 binders (5 + 1 additional)

S-3: Train participants

Process:

* Add a training session
* Enter data for the Training Sign-in Sheet – indicate CICS account needed for the Lead and Assist (not Consent)
* Enter data for one non-network member – indicate CICS account needed

Verification:

* For non-network members First and Last Name is required and email address should be unique.
* Able to create CICS account for non-network member
* Email should be generated to both PIDs and non-network member indicated to get a CICS account (not for the third PID).
* Note the UserID and initial Password

C-1: Login to CICS, create new password

Process:

* Go to demo CICS site
* Enter login ID and password for the Lead that were in the email
* Change password

Verification:

* Logout and log in again with the new password

C-2: Change Password

Process:

* Login with the Assist account
* Change password when prompted
* Change password

Verification

* Should be able to login with the new password

C-3: Activate patients

Process:

* Activate patients 1, 2, and 3

Verification:

* Should display the link to ‘upload image’ for both images for the first visit for the first three patients.

C-4: Upload images, mark one or more as unavailable, make one patient visit incomplete

Process:

* For Patient 1: upload both images
* For Patient 2: upload one image, mark the other image as Unavailable
* For Patient 3: upload one image only.

Verification:

* In CICS comments should be required for Patient 2 image marked as Unavailable
* Should see the uploaded images and the one marked as Unavailable
* Should see Patient 1 in the Study Management 🡪 Patient Images 🡪Received grid
* Should see Patient 2 in the Study Management 🡪 Patient Images 🡪Unavailable grid
* Should see Patient 3 in the Study Management 🡪 Patient Images 🡪 Incomplete grid

C-5: Upload image for incomplete visit

Process:

* Upload the second image for Patient 3

Verification:

* New image should be visible in the SMS Study Tracking Patient Grid.

S4: RC rejects images, accepts images, indicates images need cropping

Process:

* For Patient 1: RC-Verify both images
* For Patient 2: Reject image, RC-Verify-Unavailable the unavailable image
* For Patient 3: RC-Verify-Crop one image, RC-Verify the other

Verification:

* In CICS, for Patient 1, should be able to upload images for End of Active Treatment Visit, but not for Patients 2 and 3.
* In CICS, all accepted images should appear in green border, and rejected images should appear in red border
* In CICS, updated status values should appear
* In SMS Image Tracking screen, should see the ‘Cropping’ link for Patient 3 image that is RC-Verify-Crop.
* In SMS, Rejected image should appear in the Study Management 🡪 Patient Images 🡪 Rejected grid
* In SMS, RC-Verify-Crop image should appear in the Study Management 🡪 Patient Images 🡪 Crop grid
* In SMS, RC-Verify should appear in green border, RC-Verify-Crop in Orange, Received in yellow, Rejected in Red

S5: Westat crops images and uploads and marks as verified

Process:

* Login into the CICS site as a Westat user (admin or ImageOperator)
* In the SMS, select ‘Cropping’ to link to the CICS site
* From CICS, download the image, upload a replacement image in its place (may but does not have to be a real cropped image from PhotoShop)
* From SMS, set the status = ‘Westat-Verified’

Verification:

* From SMS, verify can see the new image.
* After uploading the replacement image and Westat-Verified, from CICS should see that it is accepted and be able to upload images for ‘End of Active Treatment’ visit.

S6: Westat adds more patients

Process:

* From the SMS Study Tracking screen, click ‘Add Patient’ twice to add two new patients – total of 8 patients.

Verification:

* From SMS, should be able to see the two new patients in the grid after refreshing the page.
* From CICS, should be able to see the two new patients in the grid.

S7: RC creates new non-participating account for network member

Process:

* In the Study Tracking screen, in the Additional Location Members section, select Non-Participating and ‘Create Account’ for an additional member.

Verification:

* Should receive invitation email for new account.
* Should be able to log into CICS with new account.

S8: RC creates new account for a non-network member

Process:

* In the Study Tracking screen, in the Additional Location Non-Members section, select ‘Add New’ and provide contact information.
* Make the email address ‘real’ for testing of the Forgot Password feature (see below)

Verification:

* Should receive invitation email for new account.
* Should be able to log into CICS with new account.

S9: RC deactivates an account

Process:

* In the study tracking screen, deactivate the account for non-network member created above

Verification:

* Should not be able to log into CICS with that account.

S10: RC reactivates an account

Process:

* In the Study Tracking screen, reactivate the account for non-network member created above

Verification:

* Should be able to log into CICS with that account again.

C5: ‘Forgot Password’ for non-network member

Process:

* On the CICS login screen, indicate ‘Forgot Password’ and enter the email address (real) of the non-network member account created above. Note: the Forgot Password email is ‘live’ and not intercepted in demo.
* Use the new password to log into CICS.

Verification:

* Should receive Forgot Password email with new password
* Should be able to login with the new password and get to the screen to change password and then proceed with regular CICS processing.

C6: Upload image for rejected

Process:

* From CICS, upload an image to replace the rejected one

Verification:

* From the SMS, the new image should be ready to be reviewed

S11: Export

Process:

* Launch the Export process from the NDPBRN virtual desktop

Verification:

* Verify the ZIP file was uploaded to the SFTP server
* Inspect the contents of the ZIP file against the specifications in the design document.
* Comments field should be included
* Patient 1 & 3 baseline visit should be exported.
* Patient 2 Baseline visit should not be exported (RC did not verify one of the images)
* In the SMS, verify the images and their respective statuses cannot be changed (locked after Export)

C7: Upload images for next round for one or more patients – TIF and DICOM and JPG

Process:

* Activate the two new patients (patients 7 & 8)
* Upload images for Patient 1, Visit 2 (End-Of-Active-Treatment visit)
* Upload images for Patient 8
* Upload one image for Patient 9, make second image Unavailable
* Then override the Patient 9 Unavailable with a real image.

Verification:

* In SMS, uploaded images should be reviewable.

S12: RC accepts images

Process:

* Accept all images that are ready for review

Verification:

* In CICS, all accepted images should not be overridable

S13: Export

Process:

* Launch the Export process from the NDPBRN virtual desktop

Verification:

* Verify the ZIP file was uploaded to the SFTP server
* Inspect the contents of the ZIP file against the specifications in the design document.
* All images should be exported as .JPG
* All Patient 7 & 8 patients baseline visit images should be exported
* All Patient 1 visit-2 images should be exported.
* In the SMS, verify the images and their respective statuses cannot be changed (locked after Export)

S14: For a new Location with at least 3 PIDs, assign two leads and an Assist

Process:

* Choose a Location with at least 3 PIDs
* In Study Participation, assign 2 Leads and one Assist.
* In Study Tracking, Activate the 2 Leads, creating default 5 patient records for both
* Create a Training session
* In the Training Worksheet, assign a CICS account to each of the three and ‘Save’.

Verification:

* Should receive Account Notification emails for each of the three
* From CICS, login as Lead-1. Should only see patients for Lead-1
* From CICS, login as Lead-2. Should only see patients for Lead-2
* From CICS, login as the Assist. On the Home page, should be able to choose between Lead-1 and Lead-2.