

## **Test Script for Storage and Organization Module**

Test Case	Objective:	Test Steps:	Scenario/User Action	Expected Results	Comments
<b>1: Centralized Document Repository:</b>	<p>1. To provide users with a dedicated section within the Document Management System for accessing and managing all documents in a centralized location.</p> <p>2. To support easy navigation and provide a clear overview of available documents, facilitating efficient document management processes.</p>	<p>1. Navigate to the repository section.</p> <p>2. Access the document listing</p> <p>3. Verify documentdisplay</p> <p>4. Perform a document search</p> <p>5. View documentdetails</p>	<p>Task: A user needs to store documents in a repository.</p> <p>Actions/Scenario:</p> <ol style="list-style-type: none"> <li>1. The user begins their session by logging into the system using their credentials.</li> <li>2. They navigate to the left-hand side menu and click on the "repository tab".</li> <li>3. Upon clicking the "repository tab", a dynamic navigation bar unfolds, displaying the option labeled "List View".</li> <li>4. The user clicks the "List View" tab which displays documents organized within nested folders on the interface periphery.</li> <li>5. The user clicks on a folder to view the folder content.</li> <li>6. Optionally, the user can click on the search icon andquickly search for a specific document or folder</li> <li>7. If a user clicks the search icon it triggers a modal.</li> <li>8. The User enters search content in the field.</li> <li>9. Next, the user clicks button “apply” to get results.</li> </ol>	<p>1. The User should find the interface layout user- friendly, with intuitive navigation options that provide a clear overview ofavailable documents.</p> <p>2. The user should have a comprehensive list of all documents stored in the repository, facilitating easyaccess and management of documents.</p> <p>3. The user should efficiently locate a specific document using the search function, demonstrating the repository's support for easynavigation and retrieval of documents.</p> <p>4. The user should gain a clear overview of the document details, includingmetadata, enhancing her understanding of the document's context and relevance.</p>	

<b>2: Folder Organization</b>	<p>To verify that users can create and manage folders within the document repository, supporting a hierarchical structure to accommodate complex organizational needs.</p> <p>To enhance document management efficiency and organization within the system.</p>	<ol style="list-style-type: none"> <li>1. Navigate to the repository section</li> <li>2. Access folder creation feature.</li> <li>3. Verify folder creation</li> <li>4. Create nested folders</li> </ol>	<ol style="list-style-type: none"> <li>1. The user begins by logging into the system using their credentials.</li> <li>2. They then navigate to the left-hand side menu and select the "repository tab".</li> <li>3. Upon selecting the "repository tab", a dynamic navigation bar appears, revealing the option labeled "New".</li> <li>4. The user clicks "New" option, which triggers a modal window offering various choices.</li> <li>5. The user selects the option to create New Folder.</li> <li>6. The user clicks "New Folder" which triggers a modal pop up.</li> <li>7. The user proceeds to click select Cabinet where they want to create a folder.</li> <li>8. Next, the user enters the folder name.</li> <li>9. Finally, the User clicks the "Create Folder"</li> </ol>	<ol style="list-style-type: none"> <li>1. Users should successfully navigate to the repository section and access the folder creation feature without encountering any errors.</li> <li>2. The folder creation process should be straightforward, allowing users to enter a name for the new folder.</li> <li>3. Upon confirming the folder creation, the newly created folder should be visible within the folder structure, confirming successful creation.</li> <li>4. Nested folders should be created correctly within their respective parent folders, facilitating hierarchical organization for complex document management needs.</li> </ol>		
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<b>3.Categorization of Documents</b>	<p>To verify that users can effectively assign categories to documents within the document repository and ensure that categories are customizable to meet specific organizational needs.</p>	<ol style="list-style-type: none"> <li>1. Navigate to the document categorization feature.</li> <li>2. Create a new category.</li> <li>3. Verify category creation.</li> <li>4. Assign categories to documents.</li> </ol>	<p>Task: The user needs to organize documents based on their content and relevance within the system.</p> <p>Actions:</p> <ol style="list-style-type: none"> <li>1. The user begins their session by logging into the system using their credentials.</li> <li>2. They navigate to the left-hand side menu and click on the "repository tab".</li> <li>3. Upon clicking the "repository tab", a dynamic navigation bar unfolds, displaying the option labeled "List View".</li> <li>4. The user clicks the "List View" tab which displays documents organized within nested folders on the interface periphery.</li> <li>5. To initiate actions on a specific folder, the user right-clicks on the folder of interest, triggering the emergence of a modal window with various options.</li> <li>6. Within the modal window, the user clicks "properties", prompting the display of a contextual sidebar on the right-hand side of the screen, featuring a tab labeled "Metadata Fields".</li> <li>7. The user clicks "Metadata Field" which triggers a modal with input fields.</li> </ol>	<ol style="list-style-type: none"> <li>1. Users should successfully access the document categorization feature within the document management interface without encountering any errors.</li> <li>2. The category creation process should be intuitive, allowing users to enter a name for the new category and description.</li> <li>3. Upon confirming the category creation, the newly created category should be visible and selectable within the category list or dropdown menu.</li> <li>4. Users should be able to assign categories to documents seamlessly, facilitating efficient classification based on specific attributes and content.</li> </ol>	
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			8. The User clicks “Field Name” and enter the “Name” 9. Next, the user clicks “Field Data Type” and selects field Category or from the drop down. 10. The user clicks the “Add Field” button to save metadata field in the database			
<b>4.Metadata Assignment</b>	1. To ensure that users can assign metadata to documents within the document repository, enhancing search and retrieval capabilities.	1. Navigate to the metadata assignment feature. 2. Assign metadata to a document. 3. Verify metadata assignment.	Task: The User needs to enhance document search and retrieval capabilities by assigning metadata to documents. Actions. 11. The user begins their session by logging into the system using their credentials. 12. They navigate to the left-hand side menu and click on the "repository tab".	1. Users should successfully access the metadata assignment feature within the document management interface without encountering any errors. 2. The metadata assignment process should be straightforward, allowing users to enter relevant metadata fields		

		<p>4. To improve document organization and retrieval efficiency within the system</p>	<p>13. Upon clicking the "repository tab", a dynamic navigation bar unfolds, displaying the option labeled "List View".</p> <p>14. The user clicks the "List View" tab which displays documents organized within nested folders on the interface periphery.</p> <p>15. To initiate actions on a specific folder, the user right-clicks on the folder of interest, triggering the emergence of a modal window with various options.</p> <p>16. Within the modal window, the user clicks "properties", prompting the display of a contextual sidebar on the right-hand side of the screen, featuring a tab labeled "Metadata Fields".</p> <p>17. The user clicks "Metadata Field" which triggers a modal with input fields.</p> <p>18. The User clicks "Field Name" and enter the "Name"</p> <p>19. Next, the user clicks "Field Data Type" and selects field type such as Category or serialization from the drop down.</p> <p>20. The user clicks the "Add Field" button to save metadata field in the database</p>	based on		
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<p>5. <b>Efficient Retrieval</b></p>	<p>To verify that users can sort documents based on various criteria and apply filtering options to narrow down document lists effectively.</p>	<ol style="list-style-type: none"> <li>1. Navigate to Document Sorting Options.</li> <li>2. Perform Document Sorting.</li> <li>3. Navigate to Document Filtering Options.</li> <li>4. Apply Document Filtering.</li> </ol>	<p>Task: A user needs to organize project documents and filter them based on specific attributes. User Actions:</p> <ol style="list-style-type: none"> <li>1. A user logs into the system and accesses the document management interface by clicking "Repository tab menu".</li> <li>2. The user then clicks the "List View" tab which displays documents organized within nested folders on the interface periphery.</li> <li>3. The user navigates through folders to locate the document by following the project's folder structure.</li> <li>4. The User clicks on the search button as an option to retrieve documents and folders located on the Top navbar.</li> <li>5. After clicking search it will trigger a modal pop up with input fields.</li> <li>6. The user clicks on the input field to enter the search term.</li> <li>7. Next the user clicks on the next field to select whether they want to search using metadata, folder or documents.</li> <li>8. The user then clicks apply to get the search results.</li> <li>9. On the interface there is also an icon to filter the document based on the specific option that the user wants.</li> </ol>	<ol style="list-style-type: none"> <li>1. Users should successfully access multiple options for retrieving documents, including search, folder navigation, and category filtering.</li> <li>2. The search feature should accurately retrieve documents based on the keywords or phrases entered.</li> <li>3. Folder navigation should allow users to easily locate documents within the designated folders.</li> </ol>	
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			<ol style="list-style-type: none"><li>10. The user clicks on the filter button.</li><li>11. After the user clicks the filter button it will trigger a modal popup with input fields.</li><li>12. The user clicks on the input fields to enter details they want to use to filter.</li><li>13. The user clicks apply button to get results</li></ol>			
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6. Permission for Folder Organization	To ensure that user roles and permissions are properly managed to control access to folder creation, category assignment,	1.Login and Access Permissions. 2. Create Folder. 3. Assign Category to Folder. 4. and organizational structure modification within the system.	<p>Actions</p> <ol style="list-style-type: none"> <li>1. User logs into the system with valid credentials.</li> <li>2. Upon selecting the "repository tab", a dynamic navigation bar appears, revealing the option labeled "New".</li> <li>3. The user clicks "New" option, which triggers a modal window offering various choices.</li> <li>4.</li> <li>5. The user proceeds to create a New Folder if I have permission.</li> <li>6. A user who has no permission will get an “authorized error popup”</li> </ol>	Users are successfully logged in and granted access to the system based on their assigned role and permissions. Only authorized users can proceed to perform administrative tasks related to folder organization and document categorization.		
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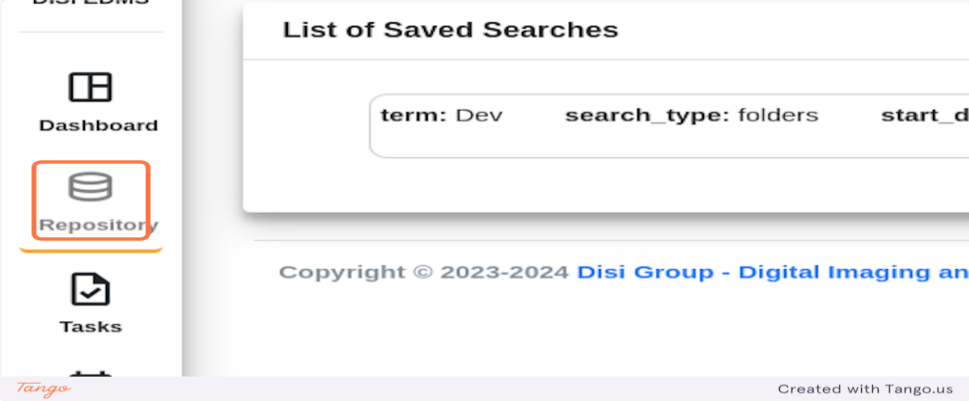
<b>7. Integration with Workflow</b>	<p>To Ensure seamless integration between the organizational structure, including folders and categories, and the Workflow Automation feature to maintain consistency in document management processes</p>	<ol style="list-style-type: none"> <li>1. Create Workflow with Folder Dependencies.</li> <li>2. Trigger Workflow Based on Folder Action.</li> <li>3. Update Workflow to Reflect Organizational Changes.</li> <li>4. Document Routing and Approval Process.</li> </ol>	<p>Actions.</p> <ol style="list-style-type: none"> <li>1. User creates a new workflow that depends on specific folders</li> <li>2. A document is added by a user to a folder that triggers a workflow.</li> <li>3.</li> <li>4. A document enters a workflow that involves routing through multiple folders for review and approval.</li> </ol>	<p>The user can define the workflow and specify folder dependencies.</p> <p>The system properly integrates with the organizational structure to enforce workflow requirements based on folder conditions. The document triggers the associated workflow automatically. The system updates all associated workflows to reflect the changes in the organizational structure.</p> <p>The document follows the predefined workflow path, routing through each designated folder or category for appropriate actions. Workflow automation accurately tracks the document's progress through the defined stages, ensuring timely reviews and approvals.</p>		
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<p><b>8. Document Sorting and Filtering</b></p>	<p>To verify that users can sort documents based on various criteria and apply filtering options to narrow down document lists effectively.</p>	<p>Navigate to Document Sorting Options Perform Document Sorting: Navigate to Document Filtering Options. Apply Document Filtering:</p>	<p>Task: The user needs to organize project documents and filter them based on specific attributes. User Action</p> <ol style="list-style-type: none"> <li>1.A user logs into the system.</li> <li>2.The user clicks on “listing” to display a list of available documents starting with the most recent.</li> <li>3.The user clicks on the filter button located within the interface on the top-left side.</li> <li>4.After clicking the button this action will trigger a modal pop up with input field.</li> <li>5.The user can choose whether to filter via document or metadata. If a user chose filter via document, they perform following actions               <ol style="list-style-type: none"> <li>1. Click the document tab of the modal.</li> <li>2. Next, click on the field to enter document id.</li> <li>3. Click on version field to enter document version.</li> <li>4. Next click on created by to select author of the document from the drop down.</li> <li>5. Click created by and select the creation date.</li> <li>6. Click apply button to apply filtering</li> </ol> </li> <li>6.If a user chose to filter via metadata, the user performs the following actions:               <ol style="list-style-type: none"> <li>1. Click the Metadata tab of the modal.</li> <li>2. Next, click on value, and type the metadata value.</li> <li>3. click on the Field Name and enter the field name.</li> <li>4. Click Field Data type and enter the metadata field type.</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>1.Users should successfully access options for sorting documents based on various criteria within the document management interface.</li> <li>2. Document sorting should rearrange the document list accurately according to the selected criteria, such as date, name, or category.</li> <li>3. Users should access filtering options within the interface and be able to apply filters based on specific metadata attributes.</li> </ol>	
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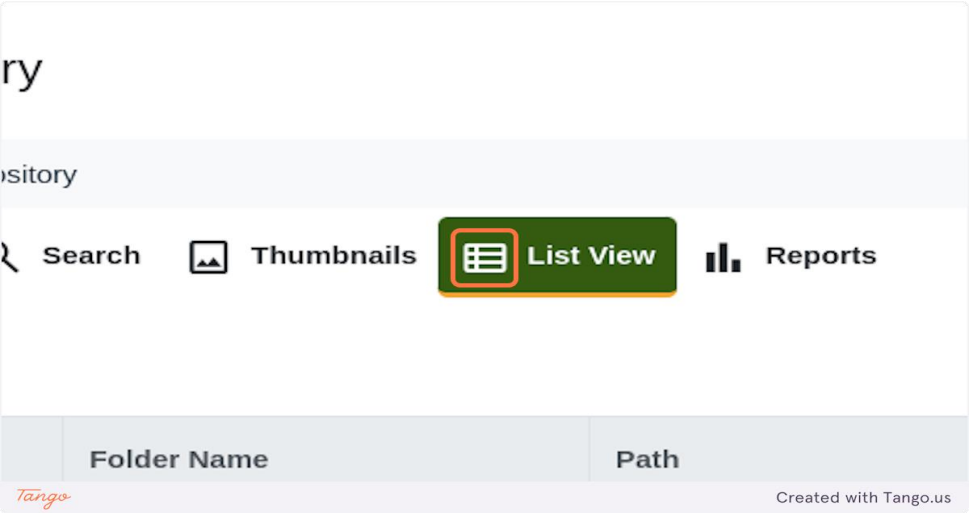
			5. Then, click on apply to filter			
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# CREATING A CENTRALIZED REPOSITORY AND EFFICIENT RETRIEVAL

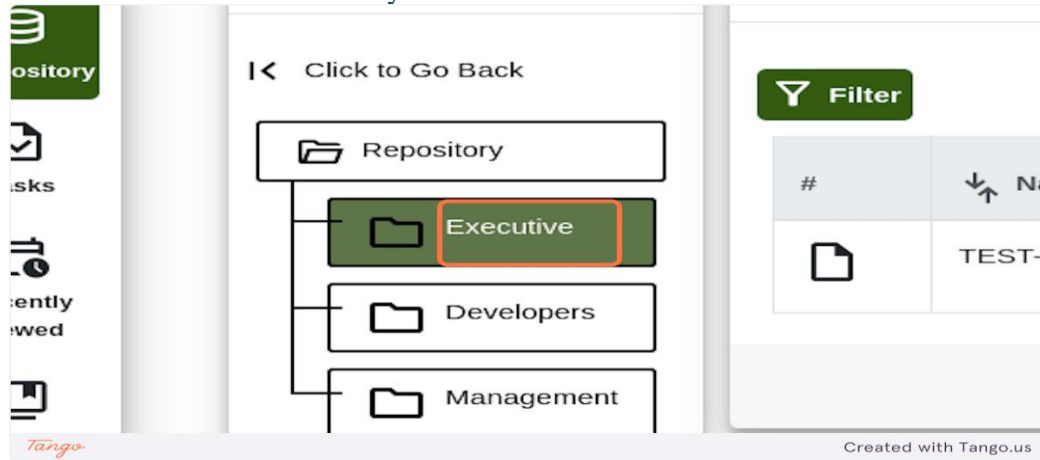
1. Click on "Repository tab"



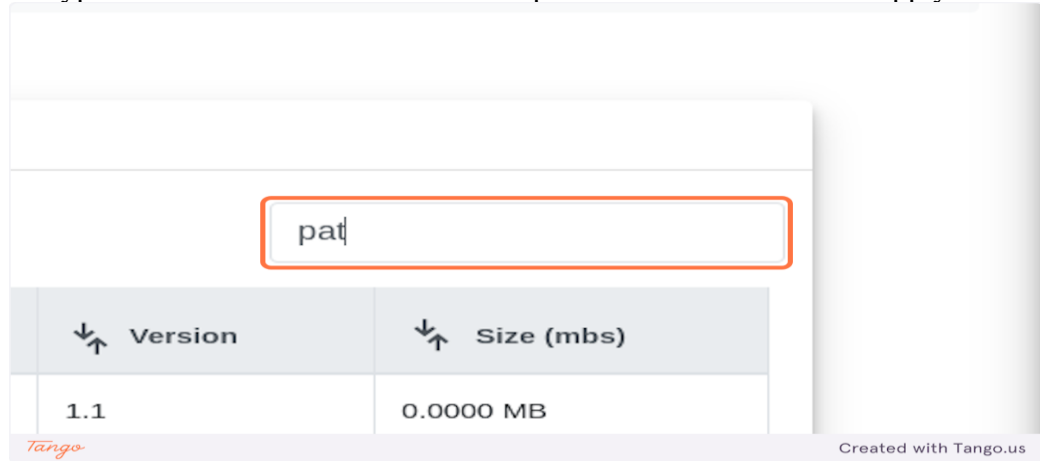
2. Click on "List View" to view document and folders



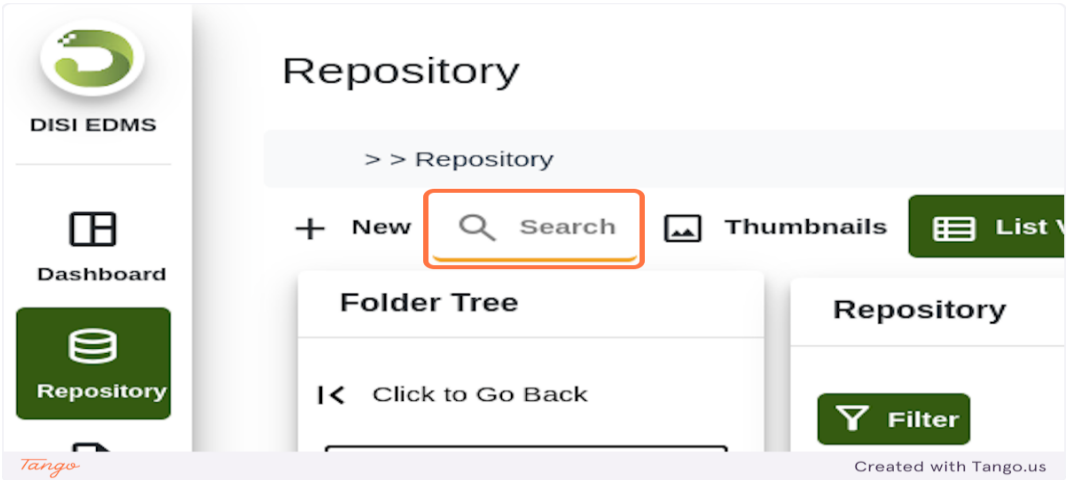
3. select and click a folder of your choice to view nested folders and documents inside them



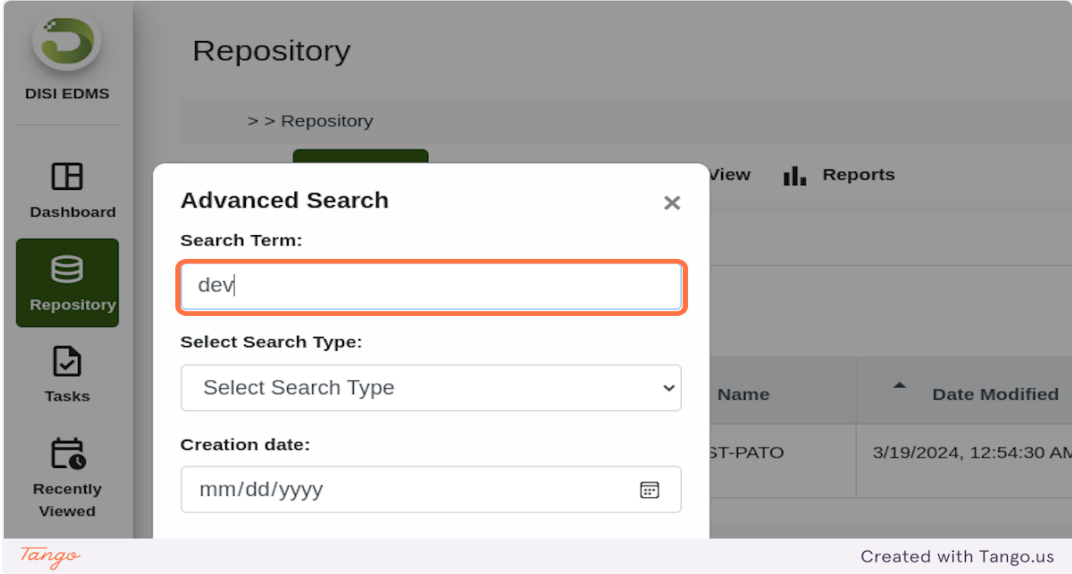
4. Type "the document name in search input field and click enter to apply document search



5. Optionally, the user can click the general search button



6. The user types the search term they want in the modal.





7. Click on the Apply button to apply general search.

Recently Viewed

Bookmarks

Saved Searches

Settings

mm/dd/yyyy

Creation date range:

mm/dd/yyyy

to

mm/dd/yyyy

Apply

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8. The results will be displayed.

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+ New

Search

Thumbnails

List View

Reports

Folders

#	Folder Name	Path
	Developers	/Repository/Developers

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Tango

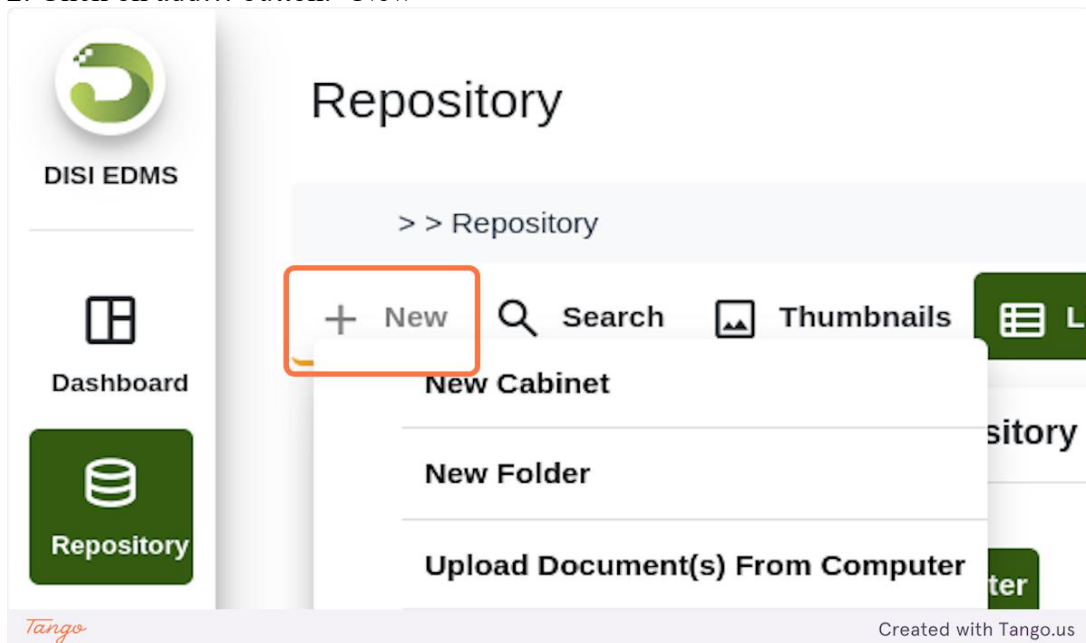
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## CREATING A FOLDER ORGANIZATION

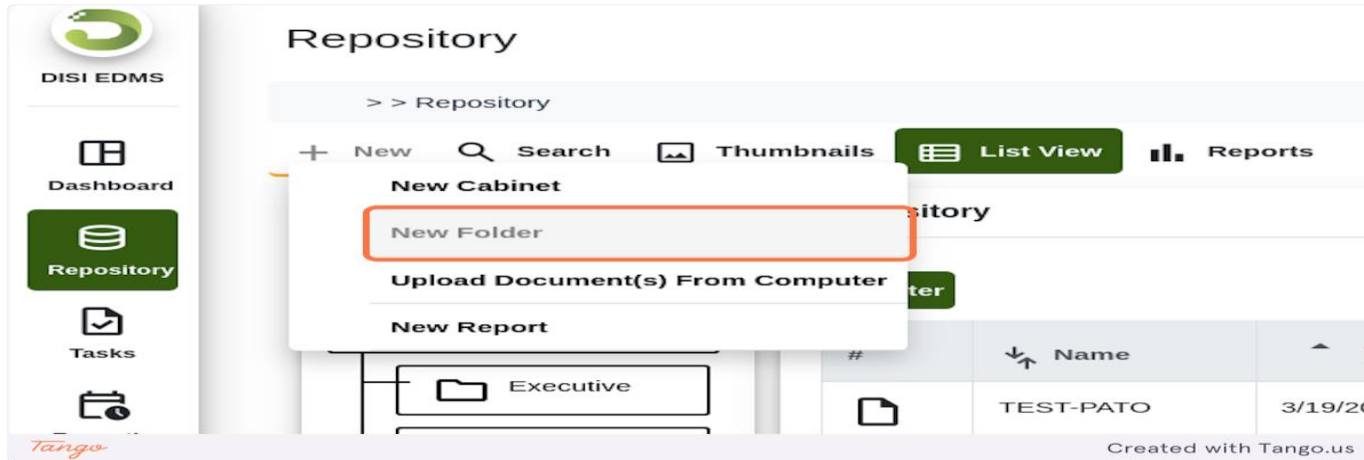
1. Click on "Repository tab"



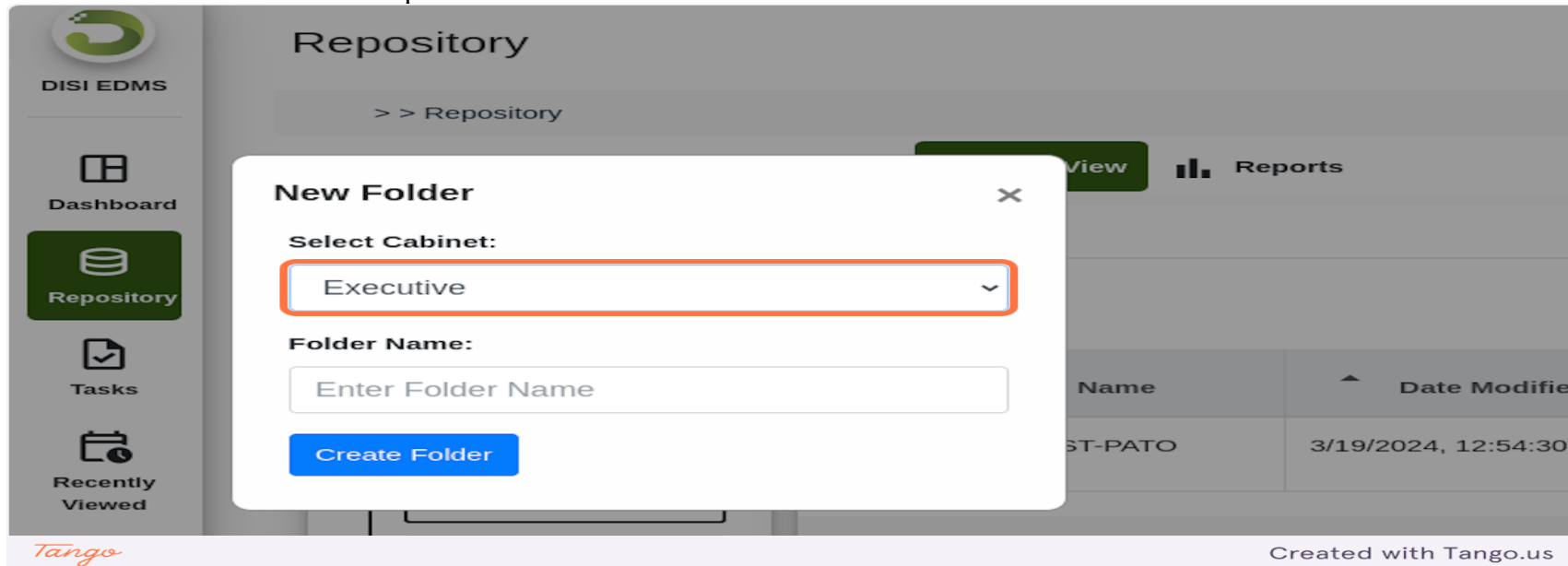
2. Click on add... button. "New"



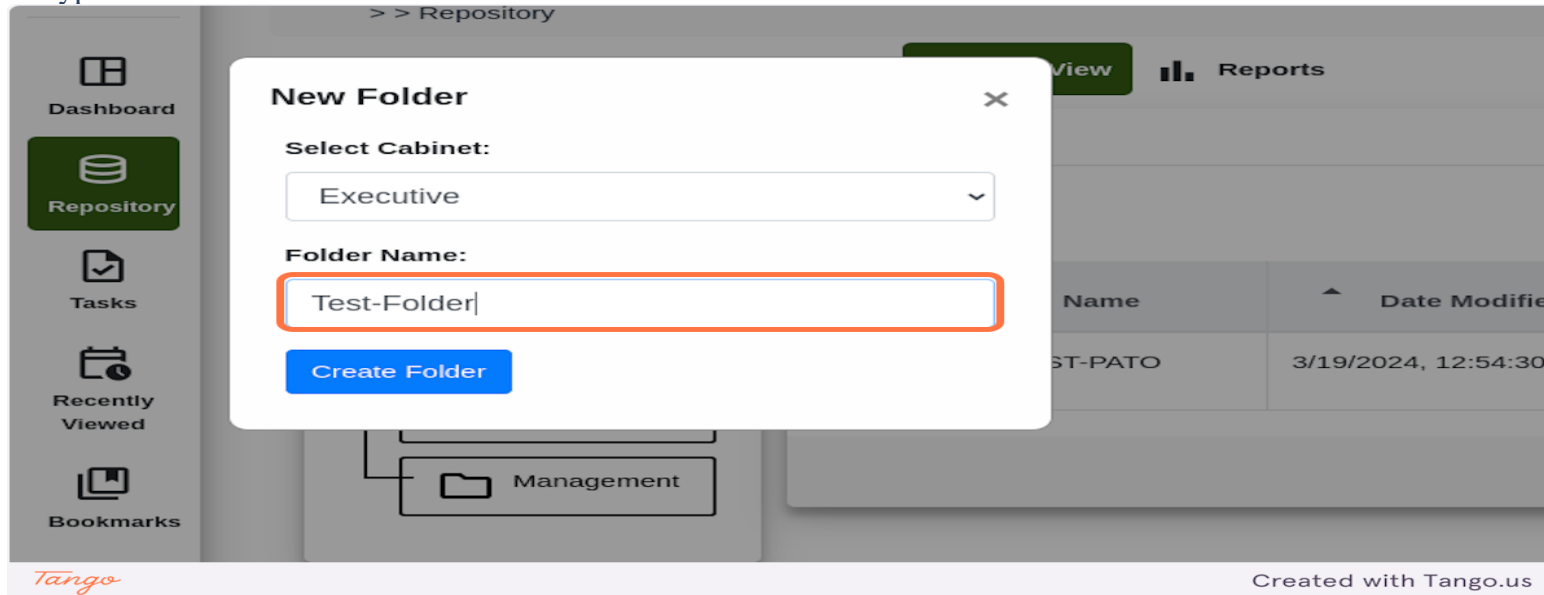
3. Click on New Folder



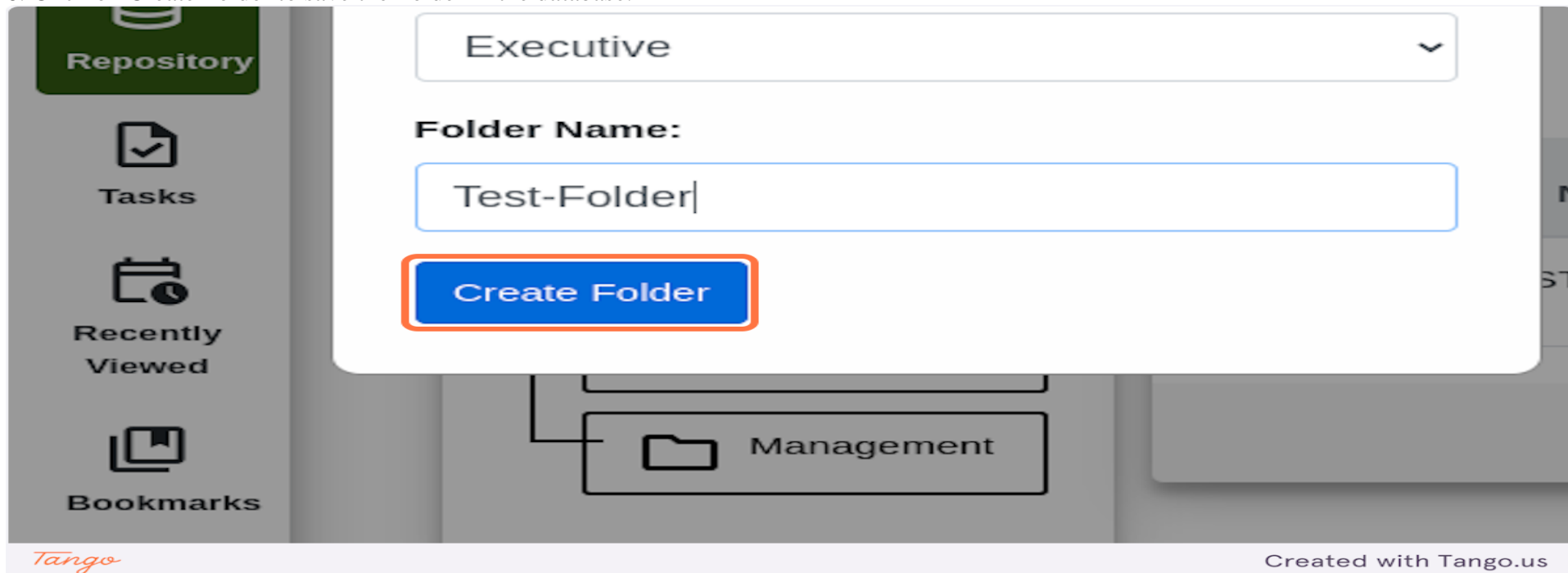
4. Select the Cabinet from the drop down.



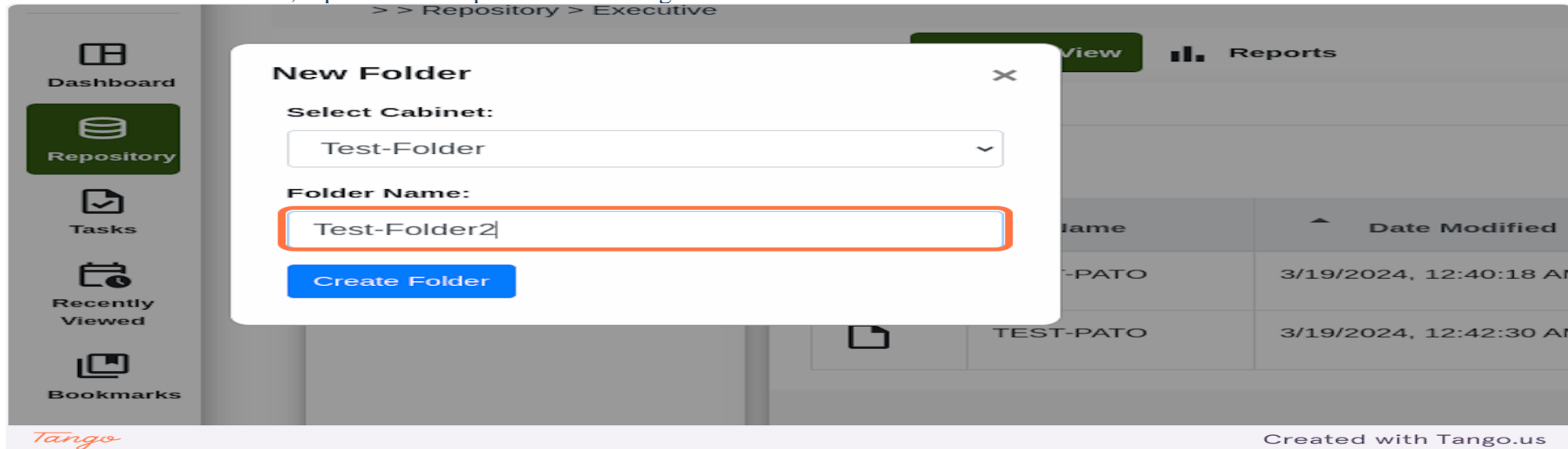
5. Type the Folder Name.



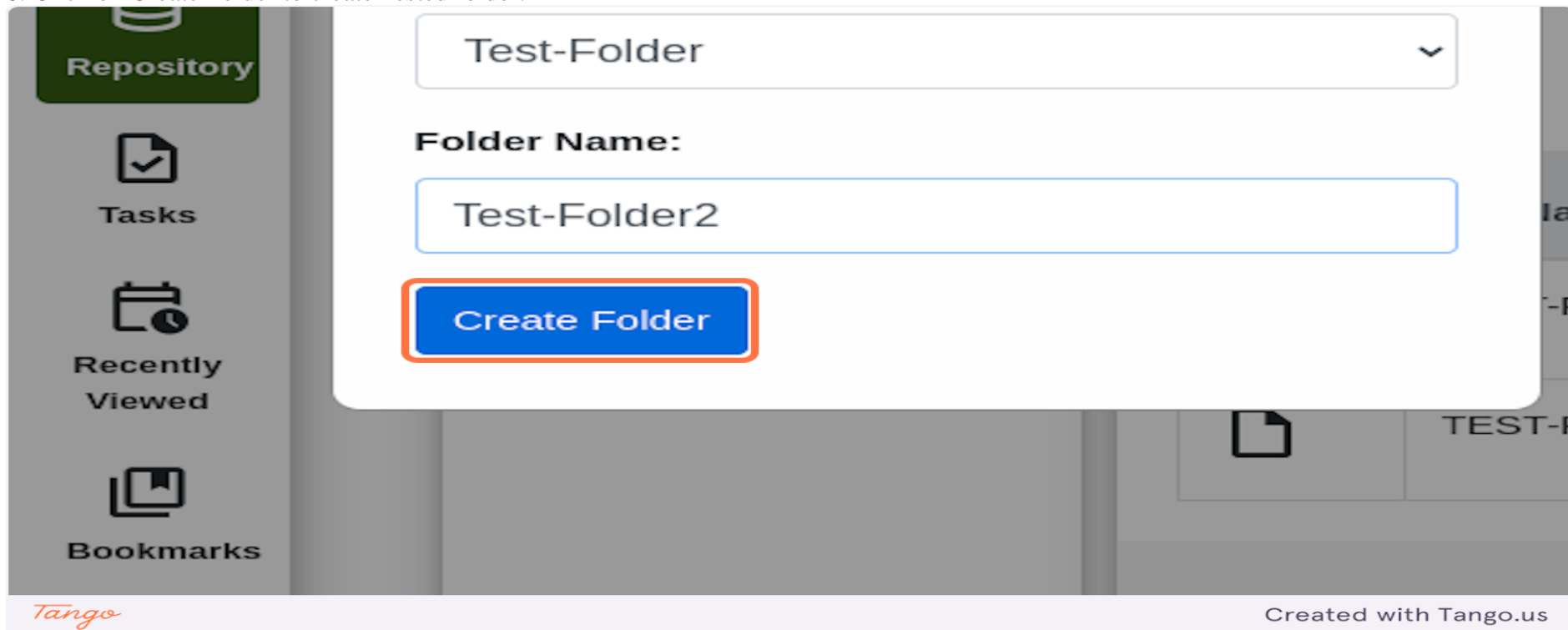
6. Click on Create Folder to save the Folder in the database.



7. To create a nested folder, repeat the same process of creating a new folder.

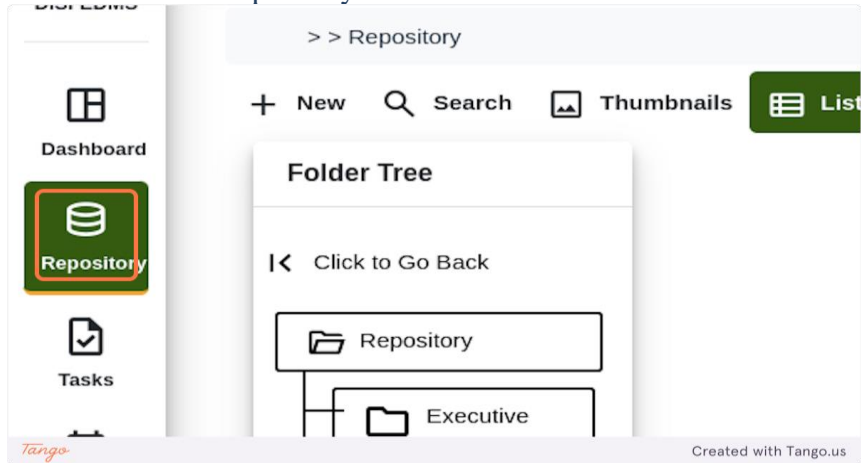


8. Click on Create Folder to create nested folder.

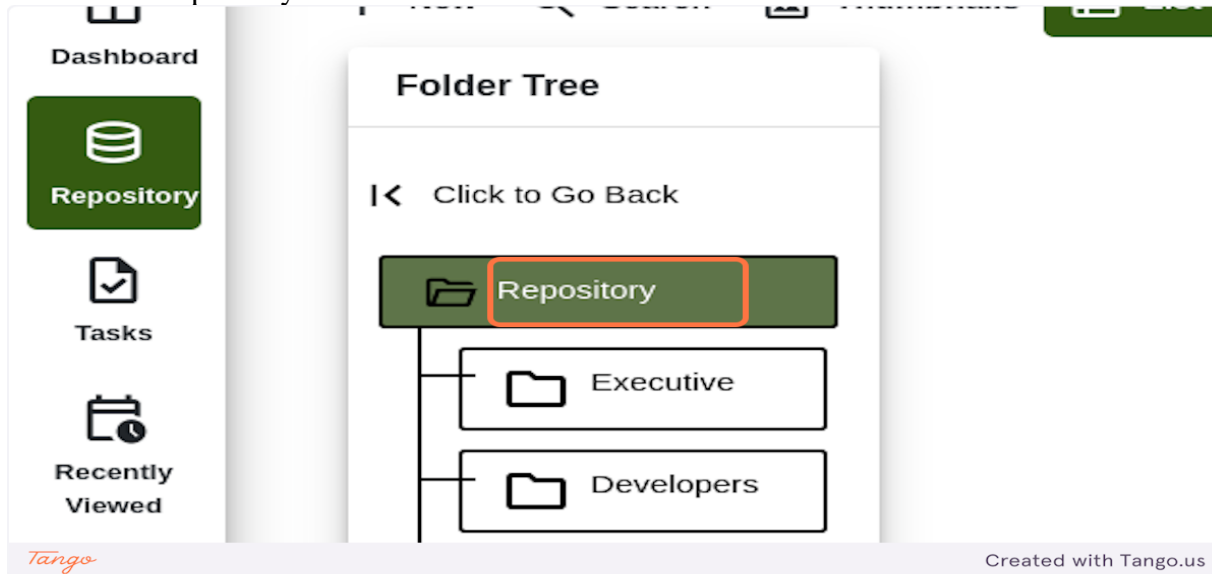


# CATEGORIZING A DOCUMENT AND ASSIGNING METADATA

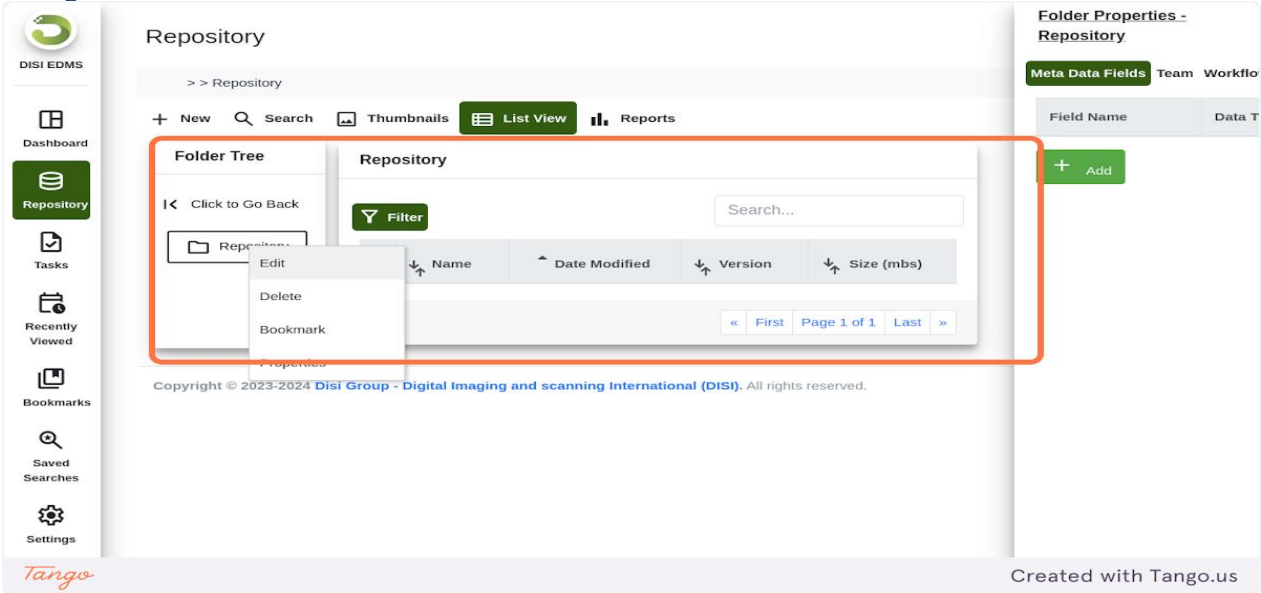
1. Click on the "Repository" tab.



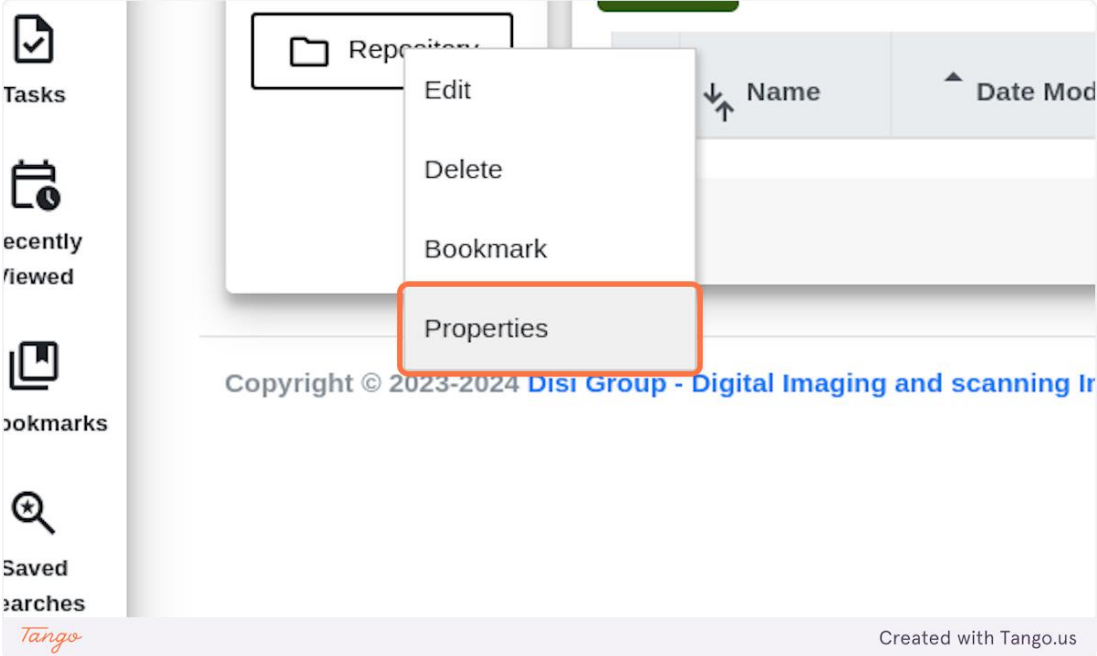
2. Click on Repository Folder



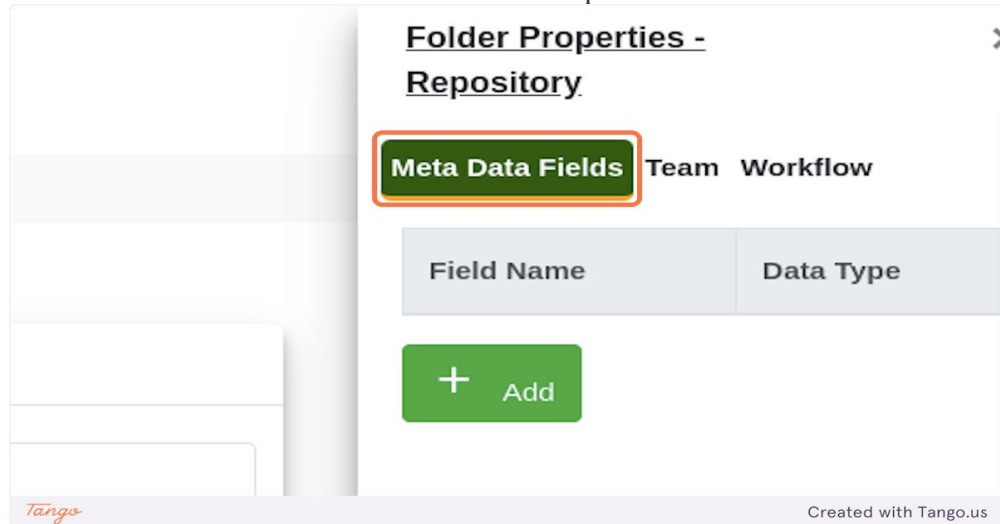
3. Right click on Folder



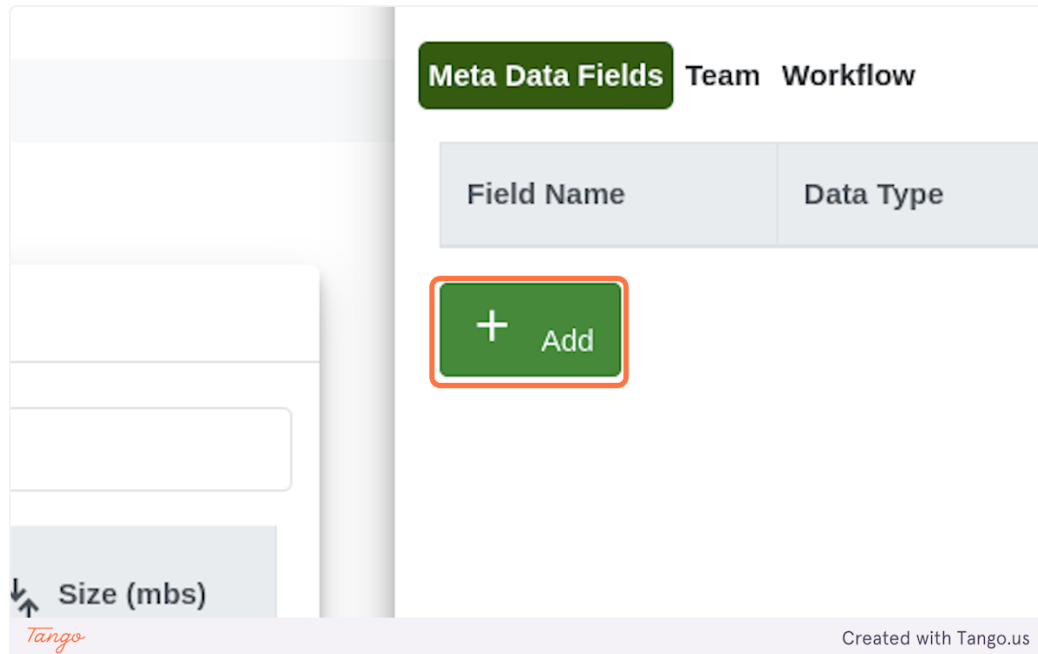
4. Click on Properties



5. Click on Meta Data Fields on Side bar Properties

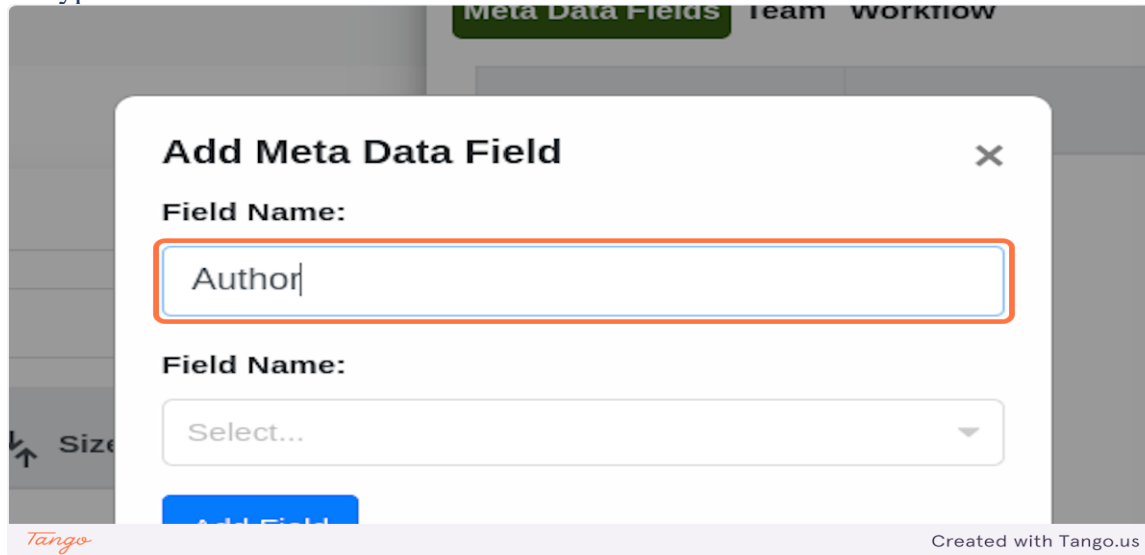


6. Click on the add button.





## 7. Type Field Name



**Add Meta Data Field** ×

**Field Name:**

Author

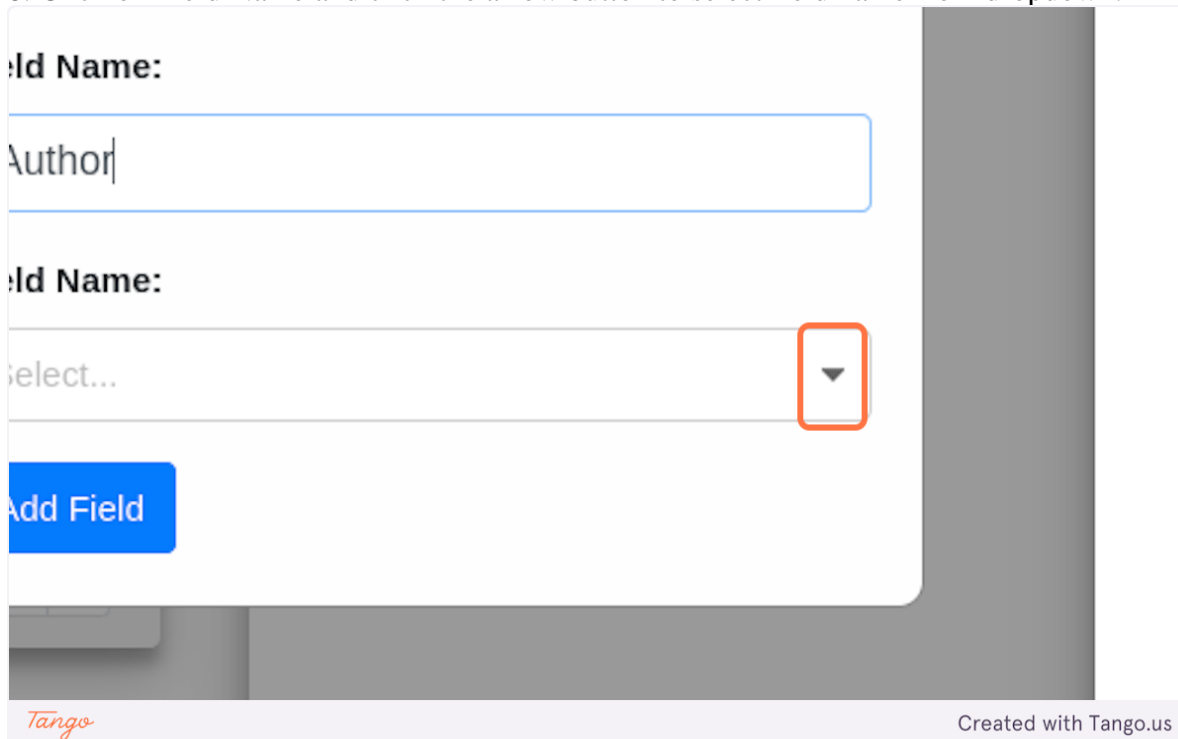
**Field Name:**

Select... ▼

**Add Field**

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## 8. Click on Field Name and click the arrow button to select field name from dropdown.



**Field Name:**

Author

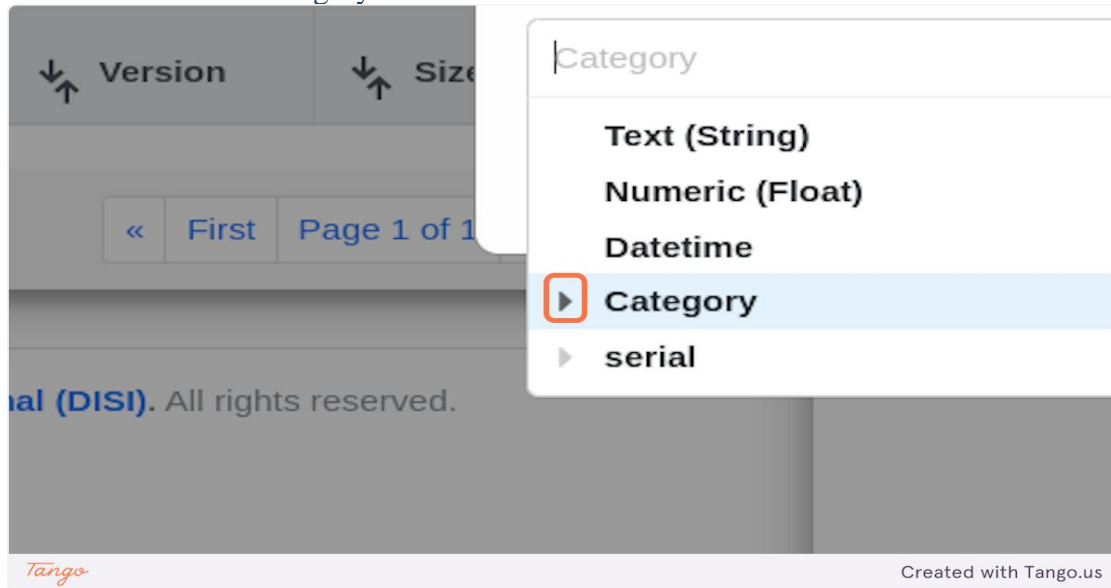
**Field Name:**

Select... ▼

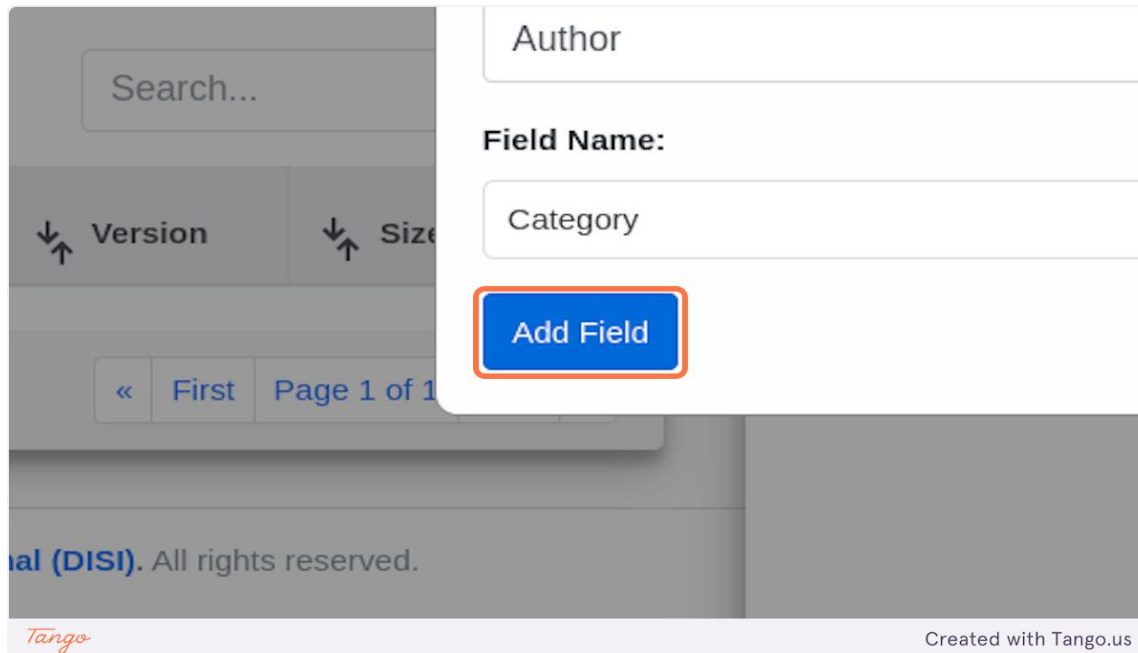
**Add Field**

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#### 9. Click and Select Category

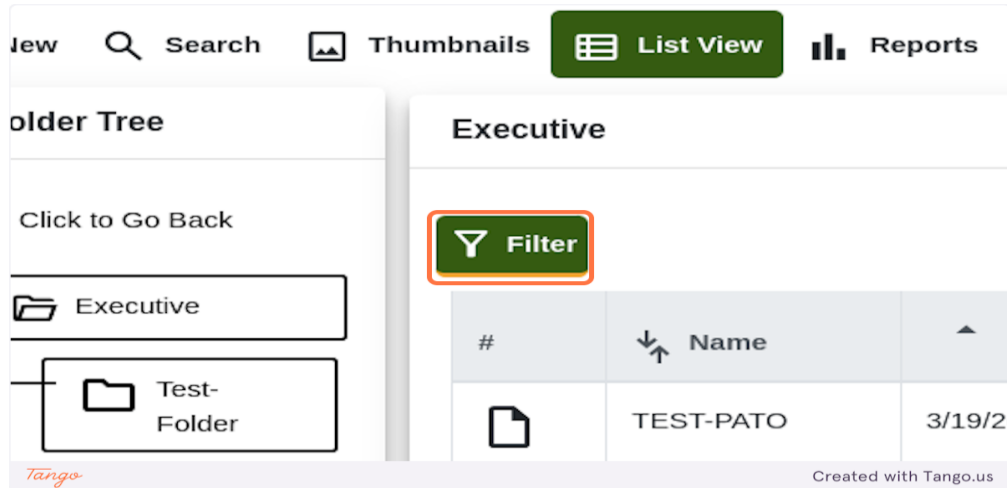


#### 10. Click on Add Field to enter Metadata Field

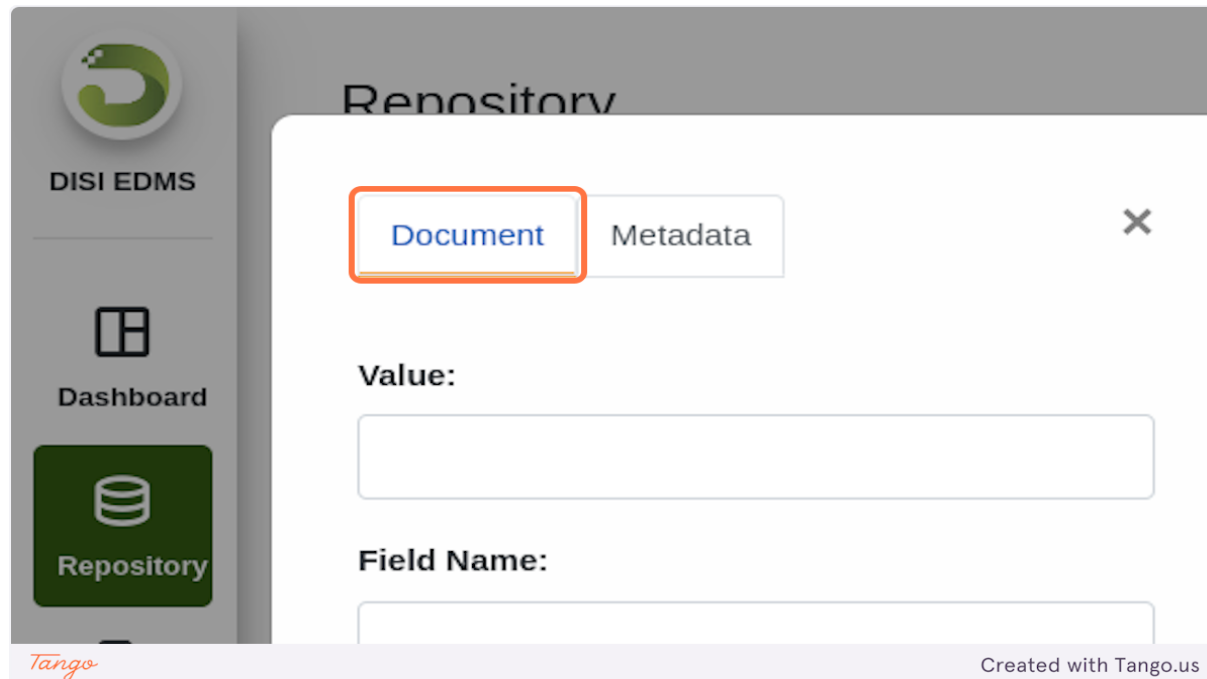


## APPLYING FILTERING FOR EFFICIENT RETRIEVAL

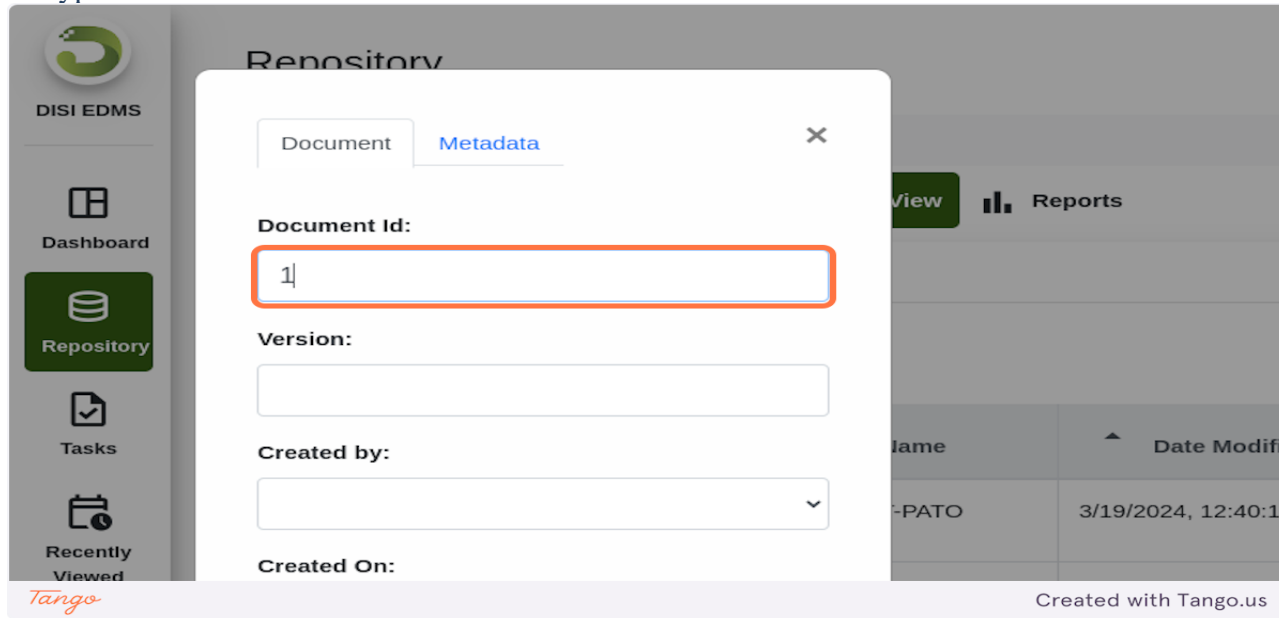
1. Click on the filter button on the left-side of the interface.



2. Click on the "Document" tab.



3. Type the document id



The screenshot shows the 'Repository' metadata form in the DISI EDMS system. The 'Document' tab is selected. The 'Document Id' field, containing the value '1', is highlighted with an orange border. Other fields include 'Version', 'Created by' (a dropdown menu), and 'Created On'. The background shows a sidebar with navigation options like Dashboard, Repository, Tasks, and Recently Viewed, and a table with columns for Name and Date Modified.

DISI EDMS

Dashboard

Repository

Tasks

Recently Viewed

Repository

Document Metadata

Document Id: 1

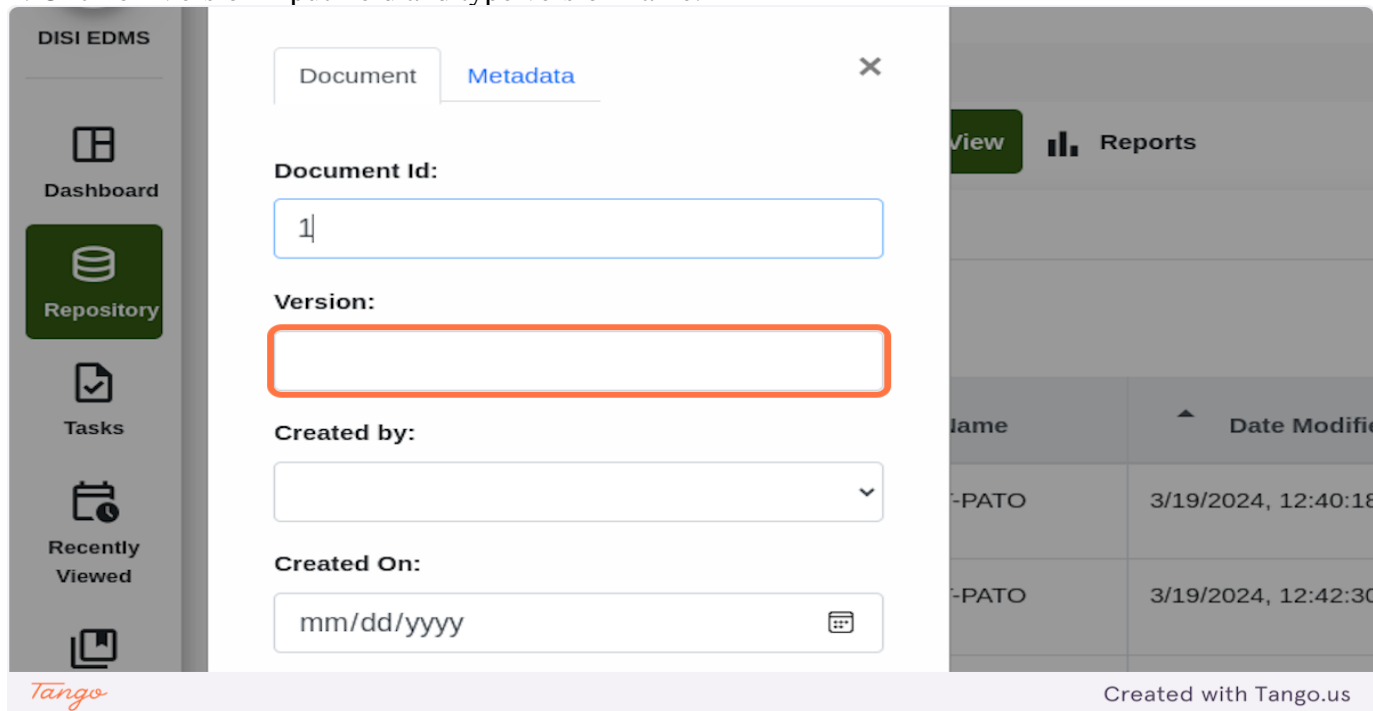
Version:

Created by:

Created On:

Created with Tango.us

4. Click on Version input field and type version name.



This screenshot is similar to the previous one, but the 'Version' input field is now highlighted with an orange border. The 'Document Id' field still contains '1'. The 'Created On' field now shows a date format 'mm/dd/yyyy' with a calendar icon. The background elements remain the same.

DISI EDMS

Dashboard

Repository

Tasks

Recently Viewed

Repository

Document Metadata

Document Id: 1

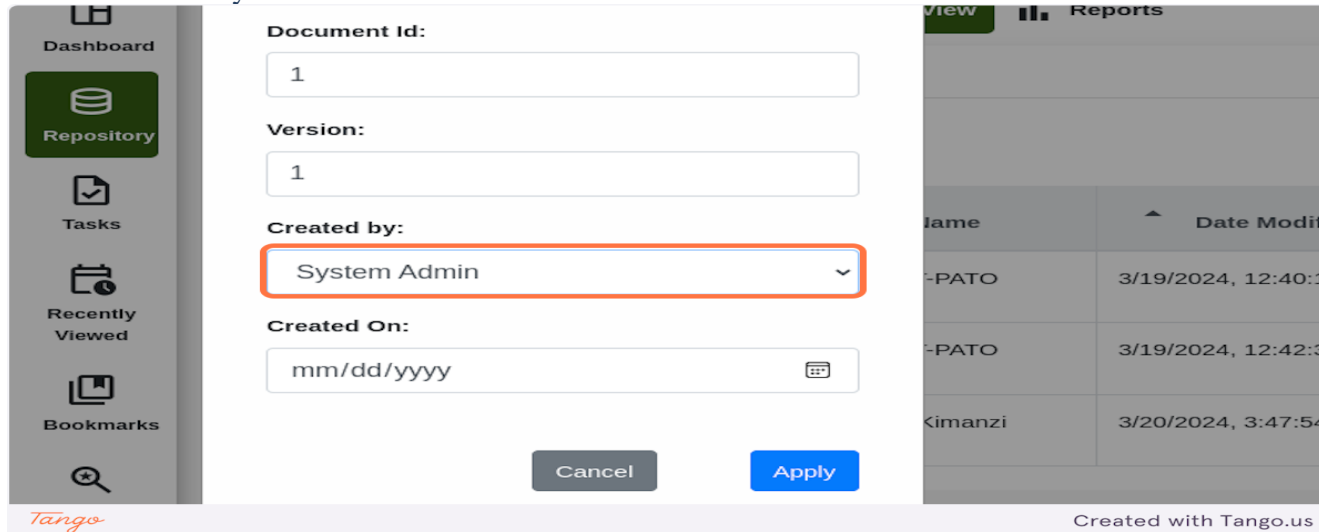
Version:

Created by:

Created On: mm/dd/yyyy

Created with Tango.us

5. Click created by and select the Author of the document



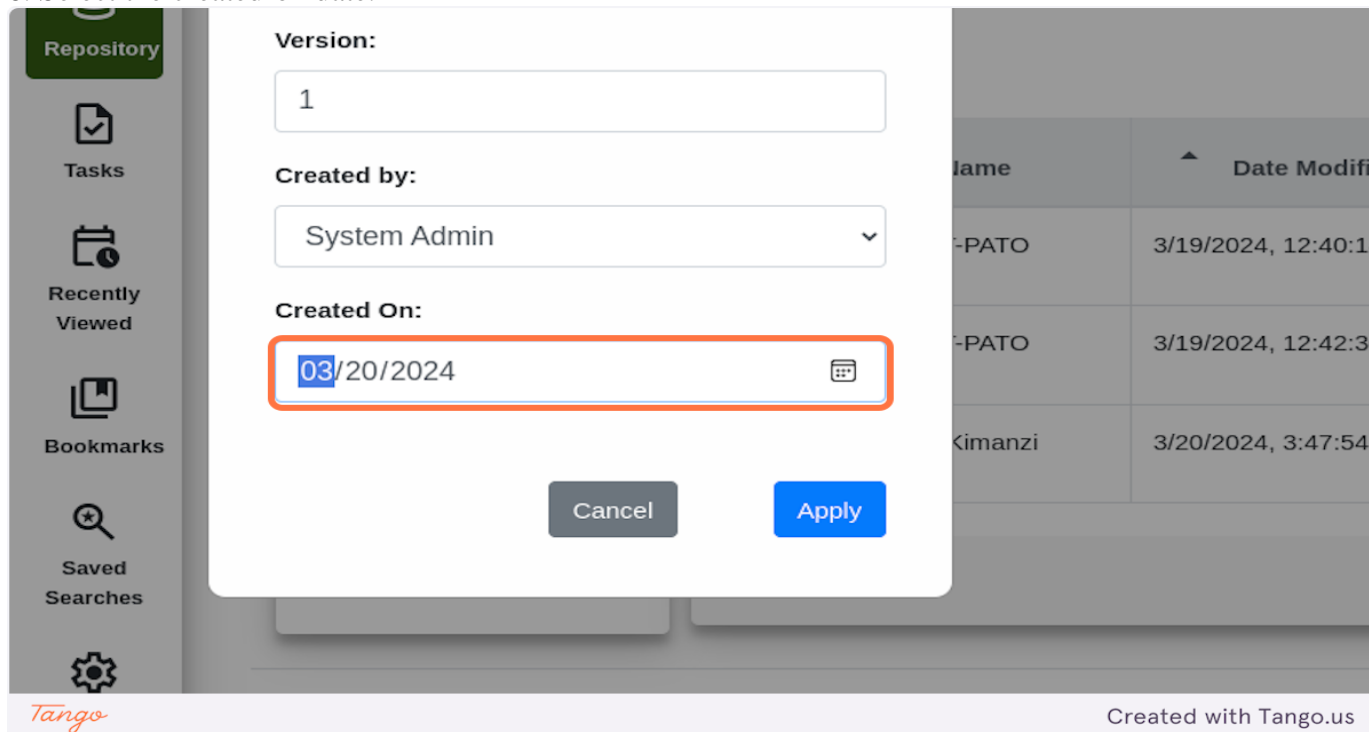
The screenshot shows a document creation modal with the following fields:

- Document Id:** 1
- Version:** 1
- Created by:** System Admin (highlighted with a red box)
- Created On:** mm/dd/yyyy

Buttons: Cancel, Apply

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6. Select the created-on date.



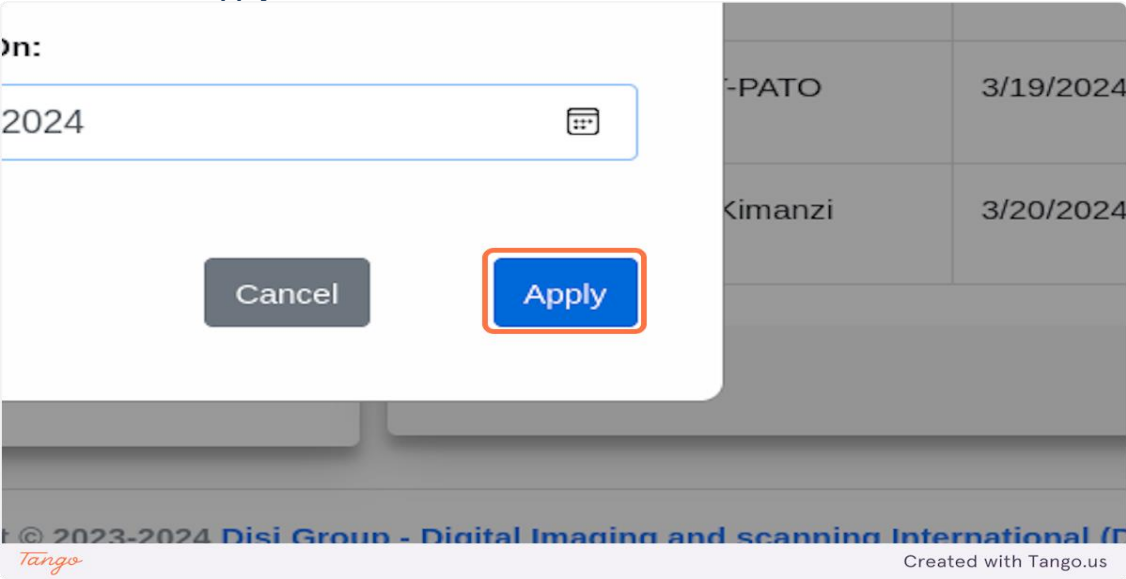
The screenshot shows the same document creation modal, but with the date field updated:

- Version:** 1
- Created by:** System Admin
- Created On:** 03/20/2024 (highlighted with a red box)

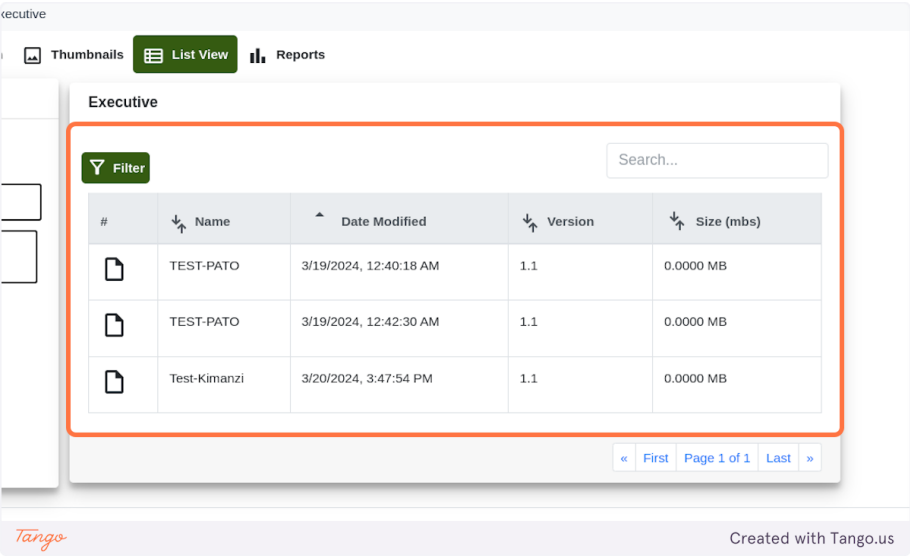
Buttons: Cancel, Apply

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7. Click on the Apply button to filter.



8. View Results



Name: .....

Date: .....

Signoff: .....











