**\*\*Summary\*\***

Navatar Investor is the next-generation LP Portal for fund marketing and investor relations. It combines all the features of a sophisticated virtual data room with a top-notch cloud solution for investor relations, allowing users to expand their reach to more LPs, help market funds, and manage relationships. It eliminates all the manual tedious tasks associated with investor management.

\* Investor Portal 1.8.4 automation test scripts which is covered CRM & Investor side end to end scenarios.

**\*\*Setup\*\***

\* Import Investor Portal project in your local system through big bucket credentials.

\* import that project in eclipse as Git project to maintain collaboration in between remote repository and your local copy of remote repository.

\* Java 1.8 or above & Environment variable should be set for JDK.

\*Eclipse marsh or higher version should be available in machine.

\*Automation script execution required minimum i3 processer with 8GB Ram & 64 bit windows operating system.

\*3 PE orgs are required with Investor Portal 1.8.4 or above version for running Investor Portal automation script.

\*Use flashback player for recording script execution.

**\*\*Run Test Suite\*\***

\* To execute the test case, run the “Executioner.java” file which is available in “com.navatar.launcher” package.

\* Before executing the test cases, select the execution status (Yes/No) from Testcase.xlsx sheet. Test case are always executing on basis of execution status set in excel sheet. If you got select execution status

“Yes” in excel sheet, then only those test case will execute.

\*Complete Investor Portal automation script can be run together.

\*We can also run each modules of Investor Portal separately.

\*Each module test script can be run separately but required below setup:-

1:-Super Admin User should be registered for Investor Portal.

2:-Same folder template should be created as given in FolderTemp

Sheet of TestCase.xlsx file.

3:-Provide CRM User1, CRM User2 & CRM User3 details in User sheet of

TestCase.xlsx file.

\*Manual setup for running module modules separately can be skip though running below scenarios of module 1 & Module 2 :-

M1tc001, M1tc002, M1tc003, M1tc005, tc0010 & M2tc002.

**\*\*Configuration\*\***

\* Change "SuperAdminUsername", SuperAdminUsernameOrg2, SuperAdminUsernameOrg3 and "password" according to your Org credentials in credentials.properties file. Complete execution will be required 3 PE orgs.

\* Change “SuperAdminRegistered”, “SuperAdminRegisteredOrg2” & “SuperAdminRegisteredOrg3” No if Admin registration steps has not been Done in credentials.properties file.If you are using old org then “SuperAdminRegistered” should be Yes.

\*Test data can be change as per as the requirement through TestCases.xlsx file.

\* Before running test case make sure you have to clear email id under Email column & set "Not Registered" value in Registered column of Contact sheet.

\*Remove red color highlighted file name from Filepath sheet of Testcases.xlsx

\*Change InvestorUrl & InvestorRegistrationUrl as per as connected hub in credentials.properties file.

\*Change GmailUserName & gmailPassword As per as requirement.

\*Please don’t make changes on BoxUserName & Password in credentials.properties file we are using this box account for Online Import functionality.

\*Set outlook as a default app for email in Script running machine.

**### Points to be remember before running script ###**

\*Add all Navatar IP (203.122.29.142, 182.156.72.94, 203.92.35.234) in network access so that verification process can be skip at the time of Login.

\*At least 35 high volume customer portal license should be available in the testing Hub.

\*At least 3 Salesforce licenses should be available in Org.

\*At least 3 user space should be available in install package.

\*Duplicate data should not be exist in system.

\*If you want to update Folder Name then you need to update in file path sheet under Testcases.xlsx also.

\*Use provided gmail id or decrease security of gmail account set less secure apps access your account.

\*Don’t change variable & header name in TestCases.xslx file.

\*Clear all highlighted file name from Filepath sheet of TestCases.xlx file.

\*Date format in filter logic test cases should be same as written in filter logic test data excel sheet.

**### Check Result & output of Script ###**

\*Check test case result from TestCases.xlsx file.

\*Check execution report “emailable-report.html” under ‘test-output’ folder.

\*Check execution Logs under Reports→Logs folder.

\*Check screenshot of failed test cases under “screenshot” folder.

* **Investor Portal Automation scripts are divided into 3 phases**
* **Investor Portal Phase 1 contains seven modules – Module 1, Module 2, Module 3, Module 4, Module 5, Module 6 & Module 7.**
* **Investor Portal Phase 2 contains eight modules- Module 8, Module 9, Module 10, Module 11, Module 12, Module 13, Module 14 & Module 16.**

**Scope of Investor Portal Phase 1:-**

**Module 1:-**

1. IP PE CRM Side- Registration
2. IP PE CRM side - Internal users

**Module 2:-**

1. IP Investor Side -Login Page
2. IP Investor Side -Registration
3. IP Investor Side - My Profile
4. IP Investor Side - My Firm's Profile

**Module 3:-**

1. IP All Document Investor Side
2. IP Investor Side - Firm Alerts
3. IP Investor Side – Dashboard

**Module 4:-**

1. IP Disclaimer investor side Test Cases
2. IP Disclaimer CRM Side Test Cases

**Module 5:-**

1. IP PE CRM Side - Workspace(Manage Folder)
2. IP PE CRM Side - Contact Grid
3. IP PE CRM Side - Account Grid
4. IP PE CRM Side - Commitment Grid
5. IP Investor Side Investments
6. IP Investor Side Bulk Download

**Module 6:-**

1. IP PE CRM Side - Workspace(Manage Target)
2. IP PE CRM Side - Workspace (Filters)
3. IP PE CRM Side - Contact Grid
4. IP PE CRM Side - Account Grid
5. IP PE CRM Side - Commitment Grid
6. IP Investor Side Investments

**Module 7:-**

1. IP PE CRM Side - Workspace(Upload & Update Documents)
2. IP PE CRM Side - Contact Grid
3. IP PE CRM Side - Account Grid
4. IP PE CRM Side - Commitment Grid
5. IP Investor Side Investments
6. IP Investor Side Bulk Download

**Scope of Investor Portal Phase 2:-**

**Module 8:-**

1. IP PE CRM Side - Build Workspace
2. IP PE CRM Side - Build Workspace (Filters)

**Module 9:-**

1. IP PE CRM Side - Manage Approvals Fund Page
2. IP PE CRM Side - Manage Approval Setting

**Module 10:-**

1. IP PE CRM Side - Manage Emails

**Module 11:-**

1. IP PE CRM Side - Folder Templates
2. IP PE CRM Side - My Profile
3. IP PE CRM Side- My Firm's Profile

**Module 12:-**

1. IP PE CRM Side - Home Alerts

**Module 13:-**

1. IP PE CRM Side -watermarking

**Module 14:-**

1. PE IP Analytics Test Cases

**Module 16:-**

1. IP PE CRM Side - File Distribution

**Scope of Investor Portal Phase 3:-**

**Module 15:-**

1. IP PE CRM Side - Bulk Testing