* **Script Details:**

Name: **TR\_Reviewer-Dashboard\_Document**

Server: **10.2.10.124**

Config File Path: **C:\Automation Team\Lotus Scrum\Reviewer Dashboard - Document\Config.xlsx**

**Test data file: C:\Automation Team\Lotus Scrum\Reviewer Dashboard - Document\TestData\_Template.xlsx**

* **Pre-requisite for Review Dashboard Document Functionality Script Execution:**

1. Binder should be created with using **Roll forward** tax client id.
2. Binder Status should be **Blank or Custom** Status.
3. Binder should content minimum **5 Missing, Received & New** Entity.
4. Binder should not be content any notes in it.

* **Binder Creation Process for Review Dashboard Document Functionality:**

1. Create tax client for 2021 - (Taxpayer info, proforma details in Income, Dividend, Interest forms)
2. Use **Roll forward** functionality on previous year (2021) tax client to create new tax client for 2022.
3. Edit some data fields to created missing entities. Also, add some new data in fields to create new entities.
4. Create binder using roll forward client id i.e. – 2022.
5. Complete all wizard’s verification process.
6. Process binder till SP Binder.
7. Same binder will appear in Review Dashboard.

* **Coverage of manual TC’s:**

We have incorporated the below mentioned test cases in the deployed automation script:

1. Sequence 1 TC’s Covered:

* Dashboard link should display only if domain level flag is enabled (TaxCaddy enable)
* Dashboard link should display only if domain level flag is enabled (non-TaxCaddy)
* Verify Missing/Received/New/(N/A) Documents for that client and binder id.
* Verify Missing Documents data when any form's entity is only with proforma d’s identifier with or without prior year data.
* Verify Received Documents data when any form's entity have reference value with or without prior year value.
* Verify data for Proforma d’s, OCR values, XML data and manually entered.
* Verify documents section when there are no records for Missing.

1. Sequence 2 TC’s Covered:

* Verify Document Pages when pages are associated to Received and New Documents.
* Verify Document Pages when pages are shortcut to Received and New Documents.
* As a CPA user, I should be able to see the Container and document info on documents checklist item second view, so that I get more information about the document.
* As a CPA, I should be able to see the full screen of pdf viewer in documents checklist item second view, so that I can see the full documents.

1. Sequence 3 TC’s Covered:

* Verify Received Documents data when page is associated or page shortcut for a missing entity.
* Verify transaction of Received entity in Missing entity when we remove references /remove associated document/remove page shortcut.

1. Sequence 4 TC’s Covered:

* Verify N/A Documents data when we cleared missing note of Missing entity.
* Verify N/A documents data when we mark missing entity as inactive.
* Verify transaction of N/A data in missing data to show in Missing documents section.

1. Sequence 5 TC’s Covered:

* Verify notes which are linked to Missing/Received/New/(N/A) entities.
* Verify single note linked with multiple documents.
* Verify multiple note and responses linked with single page.

1. Sequence 6 TC’s Covered:

* Verify Missed Documents data when we unclear missing note of received entity notes.
* Verify missing note of Missing entity.
* Verify update of existing notes.
* Verify delete or delink of any note and response with any entities.
* Verify cleared notes on Reviewer Dashboard.
* Verify Document Pages when page is associated to missing entity.

1. Sequence 7 TC’s Covered:

* Verify New Documents data when we manually create entity in binder.
* Verify New Documents data when we create entity without references.
* Verify updating of any Missing/Received/New/(N/A) entities.
* Verify modified data when we move entities in any form and change categories of any missing/ received/new and (N/A) document.
* Verify Document Pages when references are put on different pages for Received and New entities.

1. Sequence 8 TC’s Covered:

* Verify deletion of any Missing / Received/ New / (N/A) entities.
* **Logs:**

You can see the logs in the Orchestrator after execution.

**Steps to see the logs:**

Login to URL in chrome browser.

* URL: <https://cloud.uipath.com/>A screenshot of a computer

  Description automatically generated
* Click on Icon:

A screenshot of a computer

Description automatically generated

* Click on Automation Folder:

A screenshot of a computer

Description automatically generated

* Click on Process:

A screenshot of a computer

Description automatically generated

* Search process Name: TR\_Aut\_Reviewer-Dashboard\_Document

A screenshot of a computer

Description automatically generated

* click on Logs.