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| **Protocol #** | **Description** | **Purpose** | **Reqt/Spec** | Author |
|  | Document details on checkout | To verify:   * Approvers, Training entities, linked documents, Codes, Attachments, Periodic reviewers are retained on a document form on the checked-out revision (and based on options in the checkout dialog) |  |  |

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| **Prerequisites** | 1. Standard Configuration 2. The user is logged into the web interface. 3. An effective document exists and is available to be checked out by the test user and has the following:    1. At least 1 required periodic reviewer.   **Screenshot 1 - At least 1 required periodic reviewer**     * 1. At least 1 attachment.   **Screenshot 2 - At least 1 attachment**     * 1. At least 1 linked document.   **Screenshot 3 – At least 1 linked document**     * 1. At least 1 document approver.   **Screenshot 4 – At least 1 document approver**     * 1. Read and Sign training with one or more entities.   **Screenshot 5 – Read and Sign training with one or more entities**     * 1. At least 1 code tagged   **Screenshot 6 – At least 1 code tagged** | | | | |
| **Procedure** | 1. Login to the web interface as a test user. 2. Find the effective document satisfying prerequisite. 3. Check out the document.   **ER 1 – Checkout dialog is displayed**     1. Ensure that the checkboxes ‘Document Approvers (if any)’, ‘Attachments (if any)’ and ‘Training items’ are not checked.   **Note:** Checkbox ‘Open document after checkout’ is checked  **ER 2 – Options are unchecked**     1. Click on confirm button. 2. Check the attachment control of the document checked out.   **ER 3 – There are no attached document.**     1. Check the approval tab of the document.   **ER 4 – There are no approvers listed**     1. Check the training tab of the document.   **ER 5 – There is no read and sign training scheduled and no entities selected**     1. Undo checkout (from the context menu).     **ER 6 – Undo checkout is complete**     1. Try to check out the document from Prerequisite 3 but this time, ensure that the checkboxes ‘Document Approvers (if any)’, ‘Attachments (if any)’ and ‘Training items’ are checked   **ER 7 – Checkboxes are checked**     1. Confirm checkout. 2. Check the periodic review control of the document checked out and compare it with the effective document (Prerequisite 3 screenshots).   **ER 8 – Periodic reviewer(s) match**     1. Check the attachment control of the document checked out and compare it with the effective document (Prerequisite 3 screenshots).   **ER 9 – Attachment(s) match**     1. Check the linked document control of the document checked out and compare it with the effective document (Prerequisite 3 screenshots).   **ER 10 – Linked document(s) match**     1. Check the training control of the document checked out and compare it with the effective document (Prerequisite 3 screenshots).   **ER 11 – Read and sign training details and entities selected match**     1. Check the Approval control of the document checked out and compare it with the effective document (Prerequisite 3 screenshots).   **ER 12 – Approver(s) match**     1. Check the Codes control of the document checked out and compares it with the effective document (Prerequisite 3 screenshots).   **ER 13 – Codes(s) match** | | | | |
| **Pass/Fail** | | Pass:  Fail: | Type of Execution: | |  |
| Automation: | Manual: |
| **Notes/Deviations** | |  | | | |
| **Additional Remarks in case of Manual Execution** | |  | | |  |
| **Name of Tester(if Manual)** | |  | | |  |
| **Test Case Review/Approval** | | Signature of  Reviewer/Approver: | | | **Date of Approval:** |