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| **Protocol #** | **Description** | **Purpose** | **Reqt/Spec** | Author |
|  | Periodic Review – Actions required by doc Owner | To verify a document Periodic Review requires action by the document owner changing settings |  |  |

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| **Prerequisites** | 1. Standard System Configuration. 2. Two test user logins exist. For e.g Test user 1 and Test User 2. 3. Go to administrator > document types > select event type as index card>Edit document type (For eg ANT-FORM)> ensure that the checkbox ‘Document Author/Owner is NOT required to review/sign-off on completed reviews in the event Required Reviewers declare that changes to document are required’ is checked.   **Screenshot 1**     1. Go to administrator > document types > select event type as index card > Edit document type (For eg ANT-SOP)> ensure that the checkbox ‘Document Author/Owner is NOT required to review/sign-off on completed reviews in the event Required Reviewers declare that NO changes to document are required’ is checked.   **Screenshot 2** | | | |
| **Procedure** | 1. Login as Test user 1(Owner). 2. Create a new document with the document type used in prerequisite 3. 3. Add a main file, approvers and other required fields. 4. Go to the periodic review section. 5. Enter days per review (for eg: 7). 6. Add one periodic reviewer by clicking on “Edit Periodic Reviewers” link. 7. Check-in the document and rout in for approval. 8. Approve the document and make it effective.      1. Logout as Test user 1. 2. Login as Test user 2 (periodic reviewer added in step 6) 3. Open the periodic review wizard to view a list of documents awaiting the user’s review.   **ER 1 – Periodic review of the document is available in Test User 2’s wizard**     1. Click to view the document and perform the periodic review with a review decision as ‘Change’/’Changes Required’ 2. Open the periodic review wizard again and hit refresh.   **ER 2–periodic review for the next due date is available in Test User 2’s wizard.**     1. Logout. 2. Login as Test user 1. (Owner ) 3. Open the periodic review wizard to view a list of documents awaiting your review.   **ER 3 – The periodic review for the current due date is available in Test user 1’s review window as owner review is not required.**     1. Again Create a new document with the document type used in prerequisite 4. 2. Add a main file, approvers and other required fields. 3. Go to the periodic review section. 4. Enter days per review (for eg: 7). 5. Add one periodic reviewer by clicking on “Edit Periodic Reviewers” link. 6. Check-in the document and rout in for approval. 7. Approve the document and make it effective.      1. Logout as Test user 1 2. Login as Test user 2(periodic reviewer added in step(21) ) 3. Open the periodic review wizard to view a list of documents awaiting the user’s review.     **ER 4 – Periodic review of the document is available in Test User 2’s wizard**     1. Click to view the document and perform the periodic review with a review decision as ‘Don’t Change’/’Changes Not Required’ 2. Open the periodic review wizard again and hit refresh.   **ER 5 – Periodic review for the next due date might be available in Test User 2’s wizard.**     1. Logout. 2. Login as Test user 1 (Owner) 3. Open the periodic review wizard to view a list of documents awaiting your review.   **ER 6 – Periodic review for the current due date is not available (as owner review is not required ), but the periodic review for the next due date is available in the Test user 1’s review window..** | | | |
| **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:** |