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| **Protocol #** | **Description** | **Purpose** | **Reqt/Spec** | Author |
|  | Periodic Review – Delegate | To verify   * Periodic reviews can be delegated * Delegated periodic reviews can be undelegated * Delegated periodic reviews are available to the delegate and can be reviewed by the delegate * Audit log entries are present for delegated & undelegated actions |  |  |

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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. Create new documents with periodic reviewers set for them. 4. Approve the documents and make it effective. | | | |
| **Procedure** | 1. Login as Test user 1 2. Go to Wizard>Review 3. Click on the document to view the required periodic reviewer of the document   **ER 1 – The list of required reviewers is available, and the logged in test user is a required reviewer on the list**     1. Click on the reviewer context menu next to the test user’s name.   **ER 2 – The Delegate option is available**     1. Click on ‘Delegate’, and view the list of users in the “Delegate to” field.   **ER 3 – The “Delegate To” list does not contain any of the reviewers already in the Required Reviewer list of the document**     1. Select Test User 2’s name (from Prerequisite 2) from the list and click ‘Confirm’.   **ER 4 – The second test user’s name is updated in the ‘Delegated To’ field**     1. Logout from Test user 1 and log in with the Test user 2 (User added as delegate user in step(5)). View the list of documents in the second test user’s review wizard.   **ER 5 – The delegated periodic review is available in the review wizard of the second test user**     1. Logout and login again as the original reviewer (Test User 1 from Prerequisite 2). Navigate to the review wizard. 2. Select the document which was delegated in Step 4 and click on View Document.   **ER 6 – The Change and Don’t Change options are not available**     1. Close the document. 2. Navigate to the periodic review list for the document and click on ‘Undelegate’ from the reviewer options. Confirm ‘Yes’.   **ER 7 – The delegation action is removed and the Delegated To column shows “N/A”**     1. Logout, and log in again as the second test user (Test User 2 from Prerequisite 2). 2. Navigate to the review wizard, and look for the periodic review for which the delegation was removed.   **ER 8 – The periodic review is not available for the second test user**     1. Logout, and log in again as the first test user (Test User 1 from Prerequisite 2). 2. Delegate the document again to the second test user. 3. Logout, and log in again as the second test user (Test User 2 from Prerequisite 2). 4. Click on the periodic review which was delegated in Step 14.   **ER 9 – The periodic review is available and ‘Delegated To’ field in the reviewer list is updated with the second test user’s name**     1. Click on View Document, and complete the periodic review by clicking on the Change or Don’t Change button. 2. Enter pin and comment 3. Click on confirm. 4. Check the periodic review wizard, by clicking on the Reviews link in the left navbar under wizard.   **ER 10 – The document is removed from the list after the periodic review is performed**       1. Logout from Test user 2. 2. Log in as local or system admin. 3. Navigate to Audit Log. 4. Select Test user 1 from username dropdown (Test User 1 from Prerequisite 2).   **ER 11 – The initial delegate action, the clear delegate and another delegate action which were performed by the first test user is available in the audit log**     1. Select Test user 2 from username dropdown (Test User 2 from Prerequisite 2). 2. Select type as “Enter/Update Review”   **ER 12 – The periodic review action performed by the second test user is available in the audit logs** | | | |
| **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:** |