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| **Protocol #** | **Description** | **Purpose** | **Reqt/Spec** | Author |
|  | Periodic Reviews – Owned documents | To verify   * The Owner can perform periodic review only when not waiting on others. * Periodic reviewers can be bypassed when permissions are available to do so. * Periodic reviews set in the web interface and bypassed periodic reviews are available in audit logs. |  |  |

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| **Prerequisites** | 1. Standard System Configuration 2. Three test user logins exist. 3. The test users must have Read Write permission. | | | |
| **Procedure** | 1. Login to the web interface as the first test user 1. 2. Create a new document. 3. Add a main file, approvers and other required fields. 4. Set the document owner as the current test user if not set already. 5. Go to the periodic review section. 6. Enter days per review (for eg: 365) 7. Set the target release date to the current date. 8. Click on “Edit Periodic Reviewers” link.   **ER 1 – The Edit periodic reviewer’s popup screen is displayed.**     1. Select location. 2. Select two reviewers. 3. Click on save.   **ER 2 – The selected periodic reviewers are listed.**     1. Check in the document and route the document for approval.   **ER 3 – The document is checked in and route for approval.**     1. Login with approver’s login and approve the document.   **ER 4 – The document is approved successfully and displays the successful message.**     1. Login with Test user1 2. Run jobs to move the document to the effective cabinet.   **ER 5 – The document Status is changed to effective.**     1. Go to: Wizard > Review.   **ER 6 - The document for which periodic review has been set is available.**     1. Click on the document.   **ER 7- The document is not ready to sign (as it is waiting for others to review) and the Change/Don’t Change buttons are not available.**     1. Click on the context menu for one of the periodic reviewers.   **ER 8 – Bypass option is available.**     1. Click on ‘Bypass’ to bypass the test user 2. (1st periodic reviewer added in step(10)).   **ER 9 – The bypass confirmation popup is displayed.**     1. Click on yes button.   **ER 10 – The bypass action is updated against the second test user**     1. Logout from Test user 1 (Owner). Login to the Test user 2 (1st periodic reviewer added in step(8)) checks the periodic reviews list of the second user.   **ER 11 – The periodic review is removed from the second test user’s list**     1. Logout from the Test user 2. Login to Test user 1. 2. Click on the context menu and Click on ‘Clear Bypass’ for the Test user 2 who was bypassed in step 18 and confirm.     **ER 12 – The bypass action is cleared against the second test user**     1. Logout and login as the Test user 2 and check the periodic review list.   **ER 13 – The periodic review is available to the second test user again after the bypass is cleared.**     1. Perform the periodic review by clicking on view document. 2. Click on Either Change or Don’t Change.   **ER 14 – The periodic review decision popup is displayed.**     1. Enter pin and comment. 2. Click on confirm button. 3. Logout and login again as the Test user 1 and select the document in the user’s periodic reviewer’s list.   **ER 15 – The periodic review action performed by the second test user is updated.**     1. Bypass the Third test user (Test User 3 from Prerequisite 2). 2. Click on ‘View Document’.   **ER 16 – The document is displayed in a new tab and the periodic review Change/Don’t Change buttons are available.**     1. Click on ‘Don’t Change’, then sign by providing a pin and comments. Click Confirm. 2. View the list of periodic reviews awaiting the first test user.   **ER 17 – The document is removed from the list**     1. Log in to the local admin user and view the audit logs (administration> Audit log) 2. Select type Bypass required reviewer and click on confirm.   **ER 18 – The Bypass on Test user 2 and final bypass action on the Test user 3 is available in the audit log**     1. Select type Cleared Bypass of Required Reviewer and click on confirm.   **ER 19 – Clear bypass on the second test user is available in the audit log.**     1. Select type Enter/Update Review and click on confirm.   **ER 20 – The periodic review actions performed by the Test user 1 and Test user 3 are 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:** |