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| **Protocol #** | **Description** | **Objective** | **Reqt/Spec** | Author |
|  | Read and sign training | To verify:   * Read and Sign training can be created and scheduled through the index card. * Schedule Training: on/before promotion to cabinet works as expected. * Training Due: on/before date works as expected. * Promotion settings work as expected.   Selected entities are assigned training as expected.   * An entry is made to the audit log when a read and sign is complete through the web interface. |  |  |

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| **Prerequisites** | 1. Standard System Configuration 2. The user must be logged In to the web interface 3. The group that the user is a member of should have “Read and write” permissions. 4. The group that the user is a member of should have Training related permissions. 5. Signature routes or document routes are configured. | | | |
| **Procedure** | **Part 1**   1. Login to the web interface as “Test User”. 2. Create a new document. 3. Add a main file, approvers and other required fields. 4. Click on the “Training” tab. 5. Change the training type to “Read and Sign”.      1. Click on save button. 2. Set “Schedule training: On promotion to the following cabinet” to “Approved”. 3. For “Training due,” select the radio button “before promotion to next cabinet”. 4. For “Select entities subject to training,” select the radio button “Read/Write from cabinet”.   **ER 1 – The Read and Sign Training is setup.**     1. Check in the document and route the document for approval.   **ER 2 – The document is checked in and route for approval.**     1. Login with approver’s login and approve the document.   **ER 3 – The document is approved successfully and displays the successful message.**     1. Go to: Wizard > Training.   **ER 4 - The Read and Sign training created is available.**     1. Select training 2. click on begin training   **ER 5 – Details about the training document are visible**     1. Click on Document   **ER 6 – The document should be available in a new tab with options to Sign**     1. Click on “Sign”   **ER 7 – The electronic signature dialog is presented**     1. Enter the pin and click on confirm button.   **ER 8 – User is informed that the training item is completed, and the training item details are visible with the “Signed On” date updated.**     1. Login as admin and navigate to audit log section. 2. Search the audit log for the signature entry by the test user   **ER 9 – The audit log entry for the read and sign training performed through the web interface is recorded**    **Part 2**   1. Create a new document. 2. Ensure the document is open in edit mode.   **Note**: Edit mode On/Off is indicated on the top of the form and form fields are editable when it is enabled.   1. Add the main file, approvers, and all the required fields. 2. Set the Target Release Date to one day after the current date.   **ER 10 – Target release date is set.**     1. Click on the “Training” tab. 2. Select or change the training type to “Read and Sign”. 3. Set “Schedule training: On promotion to the following cabinet” to “Approved”. 4. For “Training due,” select the radio button “before promotion to next cabinet”. 5. For “Promotion Settings”, select the checkbox “Item may be promoted to next cabinet with open training items”. 6. For “Require the following percentage of training to be completed,” select the checkbox and add “50” % in the text box. 7. For “Select entities subject to training,” select the “From Selection” radio button. Click on “Entities” link. Select two entities and click on “Update”.   **ER 11 – The Read and Sign Training is scheduled.**     1. Check in the document and route it for approval. 2. Logout and login with an approver. 3. Approve the document 4. Logout and login with the same user used in step 22. 5. Move document between cabinets through the database. 6. Go to document approved in Step 35.   **ER 12 – Approved document from Step 35 should not move to the effective cabinet as 50% of required training is not completed yet.**     1. Logout and login as one of the entity noted in Step 30. 2. Navigate to Wizard > Training.   **ER 13 - The Read and Sign training created in ER-11 appears.**    **ER 14 – Training due date is same as Target release date noted in Step 20.**     1. Begin training. 2. Sign/complete the training. 3. Log out 4. Run Jobs and Move document between cabinets through the database. 5. Log in to a user used in Step 1   **ER 15 - Approved document from Step 35 should move to the effective cabinet as 50% of required training is completed.**      **Part 3**   1. Create a new document. 2. Ensure the document is open in edit mode. 3. Note: Edit mode On/Off is generally indicated on the top of the form and form fields are editable when it is enabled. 4. Add the main file, approvers, and all the required fields. 5. Click on the “Training” tab. 6. Select or change the training type to “Read and Sign”. 7. Set “Schedule training: On promotion to the following cabinet” to “Approved”. 8. For “Training due” select radio button “by date” and set that date. 9. For “Promotion Settings” select the checkbox “Item may be promoted to next cabinet with open training items”. 10. For “Require the following percentage of training to be completed” select the checkbox and add “50” % in the text box. 11. For “Select entities subject to training” select the “From Selection” radio button. Click on “Entities” link. Select two entities and click on “Update”.   **ER 16 – Read and Sign Training is setup as described in previous steps.**     1. Check in the document and route the document for approval. 2. Approve the document. 3. Log out. 4. Log in as one of the entities noted in Step 56. 5. Navigate to Wizard > Training   **ER 17 - The Read and Sign training created in Step 56 appears and the due date is the same as “Training due by date” noted in step 53.** | | | |
| **Pass/Fail** | Pass:  Fail: | Type of Execution: | |  |
| Automation: | Manual: |
|  | **Date of Execution:** | | | |
| **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:** |