#222457 - 15a. Progress View - Accounts Table Views - Investor

## Test Scenarios on Firefox

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| **Test Case ID** | **Scenario Description** | **Result** |
|  | **Progress View** |  |
| 1 | Ensure that On Investor Portal view >> Progress View – Investor page is displayed UI correctly. |  |
| 2 | Ensure that if user don’t has permission “View Tax Progress”, then on Investor Portal view don’t show Progress View tab. |  |
| 3 | Ensure that if user has permission “View Tax Progress”, then on Investor Portal view should be shown Progress View tab. |  |
| 4 | * Ensure that when user clicks on Progress View, then Progress View page should be displayed with default Financial Year 2017/18 and displayed data correctly within Financial Year 2017/18. |  |
| 5 | * Ensure that on Financial Year list show from Financial Year 2017/18 to Current Financial Year. |  |
| 6 | Ensure that when clicks on Search button the data should be displayed accordingly within selected financial year. |  |
| 7 | * Ensure that columns: Account Code and Account Name display data correctly (mapping from legal\_entity.code and legal\_entity.name) |  |
| 8 | * Ensure that all columns in Progress view is Read only. |  |
|  | * **Annual Report** |  |
| 9 | * For Annual Report, Ensure that Report Status column displays status correctly (mapping from annual\_report\_pack.status). * + Status = In progress if annual\_report\_pack.status in (Not Started, In progress, Admin issue, Admin review, Client Review, Reject, Query O/S, Query in progress, Query View, Query Reject). * + Status = Complete if annual\_report\_pack.status in (Sent, Query Complete). |  |
| 10 | * For Annual Report, Ensure that Estimated Completion Date column displays data correctly (mapping from annual\_report\_pack.estimated\_completion\_date). |  |
| 11 | * For Annual Report, Ensure that the link PDF and Excel should be available for use if below conditions are met:  1. 1. Report status = Complete 2. 2. Account Receiving Tax Report in Linear Super Admin Progress View = Yes 3. 3. Report Sent To Client in Advisor Progress View = Yes |  |
| 12 | * For Annual Report, Ensure that if any account that has **Account Receiving Tax Report**=**NO**, the investor won't see that account. |  |
| 13 | * For Annual Report, Ensure that if any account that has **Account Receiving Tax Report = YES,** but**Report Sent To Client = NO**, then: * + Record of this account is listed under Progress View table of Investor. * + Report status is always = In Progress. * + In report link, there only icon PDF, or Excel displayed disable. |  |
| 14 | For Annual Report, Ensure that when clicks on PDF icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
| 15 | For Annual Report, Ensure that when clicks on Excel icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
|  | **Tax Report** |  |
| 16 | * For Tax Report, Ensure that Report Status column displays status correctly (mapping from tax\_pack.status). * + Status = In progress if tax\_pack.status in (Not Started, In progress, Admin issue, Admin review, Client Review, Reject, Query O/S, Query in progress, Query View, Query Reject).   + Status = Complete if tax\_pack.status in (Sent, Query Complete). |  |
| 17 | For Tax Report, Ensure that Estimated Completion Date column displays data correctly (mapping from tax\_pack.estimated\_completion\_date). |  |
| 18 | * For Tax Report, Ensure that the link PDF and Excel should be available for use if below conditions are met:  1. 1. Report status = Complete 2. 2. Account Receiving Tax Report in Linear Super Admin Progress View = Yes   3. Report Sent To Client in Advisor Progress View = Yes |  |
| 19 | For Tax Report, Ensure that if any account that has **Account Receiving Tax Report**= **NO,** the investor won't see that account. |  |
| 20 | * For Tax Report, Ensure that if any account that has **Account Receiving Tax Report = YES,** but**Report Sent To Client = NO**, then: * + Record of this account is listed under Progress View table of Investor. * + Report status is always = In Progress.   + In report link, there only icon 'PDF', or ‘Excel’ displayed disable. |  |
| 21 | For Tax Report, Ensure that when clicks on PDF icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
| 22 | For Tax Report, Ensure that when clicks on Excel icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
|  | * **Show #Items & Paging** |  |
| 23 | * Ensure that number of records per page is 20. |  |
| 24 | * Ensure that Paging is always displayed and shown data correctly for every page. |  |
| 25 | * Ensure that user is able to click on any paging as well as previous, next and display data correctly for every page. |  |
| 26 | * Ensure that show correct #Items as well as the entire records are displayed on Progress View page. |  |

## Test Scenarios on Chrome

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| **Test Case ID** | **Scenario Description** | **Result** |
|  | **Progress View** |  |
| 27 | Ensure that On Investor Portal view >> Progress View – Investor page is displayed UI correctly. | **Pass** |
| 28 | Ensure that if user don’t has permission “View Tax Progress”, then on Investor Portal view don’t show Progress View tab. | **Pass** |
| 29 | Ensure that if user has permission “View Tax Progress”, then on Investor Portal view should be shown Progress View tab. | **Pass** |
| 30 | * Ensure that when user clicks on Progress View, then Progress View page should be displayed with default Financial Year 2017/18 and displayed data correctly within Financial Year 2017/18. | **Pass** |
| 31 | * Ensure that on Financial Year list show from Financial Year 2017/18 to Current Financial Year. |  |
| 32 | Ensure that when clicks on Search button the data should be displayed accordingly within selected financial year. |  |
| 33 | * Ensure that columns: Account Code and Account Name display data correctly (mapping from legal\_entity.code and legal\_entity.name) |  |
| 34 | * Ensure that all columns in Progress view is Read only. |  |
|  | * **Annual Report** |  |
| 35 | * For Annual Report, Ensure that Report Status column displays status correctly (mapping from annual\_report\_pack.status). * + Status = In progress if annual\_report\_pack.status in (Not Started, In progress, Admin issue, Admin review, Client Review, Reject, Query O/S, Query in progress, Query View, Query Reject). * + Status = Complete if annual\_report\_pack.status in (Sent, Query Complete). |  |
| 36 | * For Annual Report, Ensure that Estimated Completion Date column displays data correctly (mapping from annual\_report\_pack.estimated\_completion\_date). |  |
| 37 | * For Annual Report, Ensure that the link PDF and Excel should be available for use if below conditions are met:  1. 1. Report status = Complete 2. 2. Account Receiving Tax Report in Linear Super Admin Progress View = Yes 3. 3. Report Sent To Client in Advisor Progress View = Yes |  |
| 38 | * For Annual Report, Ensure that if any account that has **Account Receiving Tax Report**=**NO**, the investor won't see that account. |  |
| 39 | * For Annual Report, Ensure that if any account that has **Account Receiving Tax Report = YES,** but**Report Sent To Client = NO**, then: * + Record of this account is listed under Progress View table of Investor. * + Report status is always = In Progress. * + In report link, there only icon PDF, or Excel displayed disable. |  |
| 40 | For Annual Report, Ensure that when clicks on PDF icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
| 41 | For Annual Report, Ensure that when clicks on Excel icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
|  | **Tax Report** |  |
| 42 | * For Tax Report, Ensure that Report Status column displays status correctly (mapping from tax\_pack.status). * + Status = In progress if tax\_pack.status in (Not Started, In progress, Admin issue, Admin review, Client Review, Reject, Query O/S, Query in progress, Query View, Query Reject).   + Status = Complete if tax\_pack.status in (Sent, Query Complete). |  |
| 43 | For Tax Report, Ensure that Estimated Completion Date column displays data correctly (mapping from tax\_pack.estimated\_completion\_date). |  |
| 44 | * For Tax Report, Ensure that the link PDF and Excel should be available for use if below conditions are met:  1. 1. Report status = Complete 2. 2. Account Receiving Tax Report in Linear Super Admin Progress View = Yes   3. Report Sent To Client in Advisor Progress View = Yes |  |
| 45 | For Tax Report, Ensure that if any account that has **Account Receiving Tax Report**= **NO,** the investor won't see that account. |  |
| 46 | * For Tax Report, Ensure that if any account that has **Account Receiving Tax Report = YES,** but**Report Sent To Client = NO**, then: * + Record of this account is listed under Progress View table of Investor. * + Report status is always = In Progress.   + In report link, there only icon 'PDF', or ‘Excel’ displayed disable. |  |
| 47 | For Tax Report, Ensure that when clicks on PDF icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
| 48 | For Tax Report, Ensure that when clicks on Excel icon, then the file will be downloaded into user computer with file name, format follow current standard of Annual Report Pack. |  |
|  | * **Show #Items & Paging** |  |
| 49 | * Ensure that number of records per page is 20. |  |
| 50 | * Ensure that Paging is always displayed and shown data correctly for every page. |  |
| 51 | * Ensure that user is able to click on any paging as well as previous, next and display data correctly for every page. |  |
| 52 | * Ensure that show correct #Items as well as the entire records are displayed on Progress View page. |  |

## Execution Parameters

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| --- | --- |
| **Test Environment** |  |
| **Build** |  |
| **Tester** | Hieu Thai |
| **Member/Account(s)** |  |
| **Scheme(s)** |  |
| **Execution Date(s)** |  |