

IkeaDocuScan V3 - Business Test Plan: PUBLISHER ROLE

Version: 1.0 Date: 2025-11-14 Test Role: Publisher (Content Manager)

Publisher Role Overview

Capabilities

The **Publisher** role has **create/edit** access with the following capabilities:

Includes All Reader Capabilities (see BUSINESS_TEST_PLAN_READER.md)

Plus: - Register new documents (without PDF) - Edit existing documents (within permissions) - Check-in scanned PDF files and link to documents - Send emails with document attachments or links - View and export action reminders

Cannot Do: - Delete documents (SuperUser only) - Manage user permissions - Create/edit/delete reference data - Access system configuration - View audit trail

Permission Filtering

Publisher sees ONLY documents matching their UserPermission records (same as Reader).

Critical Test Scenarios

Document Registration

TC-P-001: Register New Document (Happy Path)

Objective: Verify Publisher can register a new document successfully

Pre-conditions: - Logged in as Publisher - Know next available barcode

Test Steps: 1. Navigate to “Register Document” 2. Enter Barcode: 2025001234 3. Select Document Type: Invoice 4. Select Counter Party: ACME Corp (autocomplete) 5. Select Country: Sweden 6. Enter Document No: INV-2025-001 7. Enter Amount: 1500.00 8. Select Currency: SEK 9. Set Receiving Date: Today 10. Add Comment: Test invoice registration 11. Click “Save”

Expected Result: - Success message: “Document saved successfully” - Redirect to search or document details - Document appears in search results - Audit trail entry created - Real-time update sent to other users

Actual Result: [To be filled]

Status:

TC-P-002: Register with All Optional Fields

Objective: Verify all fields save correctly

Test Steps: 1. Register document with ALL fields populated: - All mandatory fields - Third Party (multi-select) - Document Name - All dates (Contract, Action, Sending Out,

Forwarded to Signatories) - Version Number - Action Description - All boolean flags (Fax, Original, Confidential, Bank Confirmation)

Expected Result: - All fields save correctly - All data displays in view mode - No truncation or data loss

Actual Result: [To be filled]

Status:

TC-P-003: Duplicate Barcode Detection

Objective: Verify system prevents duplicate barcodes

Pre-conditions: - Document exists with Barcode: 12345678

Test Steps: 1. Attempt to register new document 2. Enter existing Barcode: 12345678 3. Fill other required fields 4. Click “Save”

Expected Result: - Validation error: “Barcode already exists” - Document NOT saved - User can correct barcode

Actual Result: [To be filled]

Status:

Critical: This prevents data corruption

TC-P-004: Similar Document Warning

Objective: Verify warning for similar documents (same type + number + version)

Pre-conditions: - Document exists: Type=Invoice, DocNo=INV-001, Version=1

Test Steps: 1. Register new document 2. Select Type: Invoice 3. Enter DocNo: INV-001 4. Enter Version: 1 5. Attempt to save

Expected Result: - Warning modal: “Similar documents exist” with list of matching barcodes - User can: “Continue Anyway” or “Cancel” - If continue, document saves with new barcode

Actual Result: [To be filled]

Status:

TC-P-005: Invalid Data - Missing Required Fields

Objective: Verify validation for required fields

Test Steps: 1. Navigate to Register 2. Leave Barcode empty 3. Leave Document Type unselected 4. Click “Save”

Expected Result: - Validation errors display - Fields with red asterisk (*) are required - Document NOT saved - Error messages clear and helpful

Actual Result: [To be filled]

Status:

TC-P-006: Invalid Data - Special Characters in Barcode

Objective: Verify barcode accepts only valid characters

Test Steps: 1. Attempt to enter Barcode: ABC-123@## 2. Attempt to save

Expected Result: - Validation error or character rejection - Only numeric barcodes accepted (based on system rules)

Actual Result: [To be filled]

Status:

TC-P-007: SQL Injection Attempt in Registration

Objective: Verify input sanitization

Test Steps: 1. Register document 2. Enter in Document No: ' ; DROP TABLE Documents; -- 3. Enter in Comment: ' OR '1'='1 4. Save

Expected Result: - No SQL error - Data saved as literal strings - No database corruption

Actual Result: [To be filled]

Status:

Critical: Security test

TC-P-008: XSS Attempt in Registration

Objective: Verify XSS protection

Test Steps: 1. Register document 2. Enter in Comment: <script>alert('XSS')</script> 3. Save 4. View document

Expected Result: - Script tag stored as text (HTML encoded) - No script execution when viewing - Display shows literal <script> text

Actual Result: [To be filled]

Status:

Critical: Security test

Document Editing

TC-P-020: Edit Existing Document

Objective: Verify Publisher can edit documents within permissions

Pre-conditions: - Document exists within Publisher's permissions: Barcode 12345678

Test Steps: 1. Search for document 12345678 2. Click Edit 3. Change Amount from 1000 to 1500 4. Change Comment 5. Click "Save"

Expected Result: - Success message - Changes saved to database - Audit trail entry created (old value → new value) - Real-time update sent to other users

Actual Result: [To be filled]

Status:

TC-P-021: Cannot Edit Document Outside Permissions

Objective: Verify permission boundary in edit mode

Pre-conditions: - Document exists OUTSIDE Publisher's permissions: Barcode 99999999

Test Steps: 1. Attempt to navigate to /documents/edit/99999999 2. Or attempt API call:
PUT /api/documents/99999999

Expected Result: - Access Denied - Cannot edit document outside permissions - No data leaked

Actual Result: [To be filled]

Status:

TC-P-022: Concurrent Edit Detection

Objective: Verify behavior when two users edit same document

Pre-conditions: - Two Publishers logged in (Browser 1 & 2)

Test Steps: 1. Both open same document for edit 2. Publisher 1: Change Amount to 1500, Save 3. Publisher 2: Change Comment, attempt to Save (without refreshing)

Expected Result: - Option A: Last write wins (Publisher 2 overwrites Publisher 1's changes - potential issue) - Option B: Concurrency conflict detected, error message - Option C: Real-time lock prevents second user from editing

Document Expected Behavior:

Actual Result: [To be filled]

Status:

Critical: Potential data corruption issue

Check-In PDF

TC-P-030: Check-In PDF - Link to Existing Document

Objective: Verify check-in workflow links PDF to pre-registered document

Pre-conditions: - Scanned PDF file in CheckinDirectory: 12345678.pdf - Document pre-registered with Barcode: 12345678 (no file attached)

Test Steps: 1. Navigate to "Check-in Scanned" 2. Scanned file list displays 12345678.pdf 3. Click "Check-in" next to file 4. System extracts barcode 12345678 from filename 5. System finds matching document in database 6. Document details display (pre-populated) 7. Verify details are correct 8. Click "Save"

Expected Result: - PDF linked to document 12345678 - File moved from CheckinDirectory to ScannedFilePath - Renamed to permanent barcode-based name - Document now has PDF attachment - Audit trail entry created - Real-time update sent

Actual Result: [To be filled]

Status:

Critical: Core workflow

TC-P-031: Check-In PDF - Barcode Not Found

Objective: Verify handling when barcode doesn't exist in database

Pre-conditions: - PDF file: 99999999.pdf in CheckinDirectory - No document with

Barcode 99999999 in database

Test Steps: 1. Navigate to “Check-in Scanned” 2. Click “Check-in” next to 99999999.pdf

Expected Result: - Error message: “Document with barcode 99999999 not found” - OR System prompts to create new document - PDF NOT moved until document exists

Actual Result: [To be filled]

Status:

TC-P-032: Check-In PDF - Invalid Barcode Format

Objective: Verify handling of invalid filename

Pre-conditions: - PDF file: invalid_file.pdf in CheckinDirectory

Test Steps: 1. Navigate to “Check-in Scanned” 2. Attempt to check-in invalid_file.pdf

Expected Result: - Error: “Cannot extract barcode from filename” - File NOT processed - Remains in CheckinDirectory

Actual Result: [To be filled]

Status:

TC-P-033: Check-In PDF - Overwrite Existing File

Objective: Verify behavior when document already has PDF attached

Pre-conditions: - Document 12345678 already has PDF attached - New file 12345678.pdf in CheckinDirectory

Test Steps: 1. Attempt to check-in 12345678.pdf

Expected Result: - Warning: “Document already has file attached. Overwrite?” - User chooses: Yes/No - If Yes: Old file backed up or deleted, new file attached - If No: Check-in cancelled

Actual Result: [To be filled]

Status:

Critical: Prevents accidental file loss

TC-P-034: Check-In PDF - File Size Limit

Objective: Verify handling of oversized PDFs

Pre-conditions: - PDF file: 12345678.pdf size = 60MB (over 50MB limit)

Test Steps: 1. Attempt to check-in oversized file

Expected Result: - Error: “File exceeds maximum size of 50MB” - File NOT processed

Actual Result: [To be filled]

Status:

TC-P-035: Check-In PDF - Invalid File Type

Objective: Verify file extension validation

Pre-conditions: - File: 12345678.exe in CheckinDirectory

Test Steps: 1. Attempt to check-in .exe file

Expected Result: - Error: "Invalid file type. Only PDF files allowed" - File NOT processed

Actual Result: [To be filled]

Status:

Critical: Security - prevents malicious file upload

TC-P-036: Check-In PDF - Path Traversal Attempt

Objective: Verify protection against path traversal

Pre-conditions: - File: ...\\12345678.pdf in CheckinDirectory

Test Steps: 1. System attempts to process file with path traversal characters

Expected Result: - Path sanitized or rejected - File saved to correct directory only - Cannot escape ScannedFilesPath

Actual Result: [To be filled]

Status:

Critical: Security test

Email Functionality

TC-P-040: Send Email with Attachments

Objective: Verify email sending with PDF attachments

Pre-conditions: - Search results with 3 documents (all have PDFs) - SMTP configured

Test Steps: 1. Search for documents 2. Select 3 documents (checkboxes) 3. Click "Send Email" 4. Enter recipient: test@company.com 5. Select "Attach PDFs" 6. Click "Send"

Expected Result: - Email sent successfully - Recipient receives email with 3 PDF attachments - Email contains document details (barcodes, types, etc.) - Uses configured email template - Success confirmation message

Actual Result: [To be filled]

Status:

TC-P-041: Send Email with Links

Objective: Verify email with document links (no attachments)

Test Steps: 1. Select documents 2. Choose "Send as Links" option 3. Send email

Expected Result: - Email contains clickable links to documents - Links format: <https://server/documents/edit/{barcode}> - No file attachments - Recipient can click links to view (if they have access)

Actual Result: [To be filled]

Status:

TC-P-042: Email - Invalid Recipient

Objective: Verify validation of email addresses

Test Steps: 1. Attempt to send email 2. Enter recipient: invalid-email 3. Click Send

Expected Result: - Validation error: “Invalid email address” - Email NOT sent

Actual Result: [To be filled]

Status:

TC-P-043: Email - SMTP Failure

Objective: Verify handling of email delivery failure

Pre-conditions: - SMTP server unreachable or credentials invalid

Test Steps: 1. Attempt to send email

Expected Result: - Error message: “Failed to send email: [reason]” - User notified of failure - No silent failure

Actual Result: [To be filled]

Status:

Action Reminders

TC-P-050: View Action Reminders

Objective: Verify Publisher can view action reminders

Pre-conditions: - Documents exist with ActionDate = today

Test Steps: 1. Navigate to “Action Reminders” 2. View list of due actions

Expected Result: - List displays documents with ActionDate = today - Filtered by Publisher’s permissions - Shows: Barcode, Type, Action Date, Description - Can export to Excel

Actual Result: [To be filled]

Status:

TC-P-051: Action Reminder Edge Case - ActionDate Before ReceivingDate

Objective: Verify validation of date logic

Pre-conditions: - None

Test Steps: 1. Register or edit document 2. Set ReceivingDate: 2025-11-14 3. Set ActionDate: 2025-11-01 (earlier than receiving) 4. Save

Expected Result: - Validation error: “Action date cannot be before receiving date” - OR System allows but doesn’t show in action reminders - Document expected behavior

Actual Result: [To be filled]

Status:

Critical: Data quality check

Edge Cases & Data Corruption Scenarios

TC-P-060: Very Long Text Fields

Objective: Verify handling of maximum field lengths

Test Steps: 1. Register document 2. Enter Comment: 5000 characters 3. Enter DocumentNo: 500 characters 4. Enter ActionDescription: 2000 characters 5. Save

Expected Result: - Fields either truncate with warning OR - Validation error if over limit - No database error - Data saved correctly or rejected cleanly

Actual Result: [To be filled]

Status:

TC-P-061: NULL Values in Optional Fields

Objective: Verify handling of NULL/empty values

Test Steps: 1. Register document with only required fields 2. Leave all optional fields empty 3. Save

Expected Result: - Document saves successfully - NULL or empty values stored correctly - No errors when viewing/editing later

Actual Result: [To be filled]

Status:

TC-P-062: Delete In-Use Counter Party

Objective: Attempt to delete counter party referenced by documents

Note: Publisher cannot delete reference data, but test via API or SuperUser

Test Steps: 1. Counter Party “ACME” used by 10 documents 2. Attempt to delete “ACME”

Expected Result: - Error: “Cannot delete - in use by X documents” - Deletion blocked (foreign key constraint)

Actual Result: [To be filled]

Status:

Critical: Prevents referential integrity violation

TC-P-063: Rapid Successive Saves

Objective: Test concurrent save operations

Test Steps: 1. Edit document 2. Click Save button rapidly 5 times

Expected Result: - Only one save processed - Button disabled after first click - No duplicate audit entries - No database deadlock

Actual Result: [To be filled]

Status:

TC-P-064: Network Interruption During Save

Objective: Verify data integrity if network fails mid-save

Test Steps: 1. Edit document 2. Click Save 3. Immediately disconnect network (WiFi off)

Expected Result: - Save either succeeds (already sent) OR - Error message: "Network error - please retry" - No partial save / data corruption - User can retry when network returns

Actual Result: [To be filled]

Status:

Critical: Data integrity

Test Results Summary

Category	Total	Pass	Fail	Blocked	Not Run
Registration	8				
Editing	3				
Check-In	7				
Email	4				
Action Reminders	2				
Edge Cases	5				
TOTAL	29				

Plus: All Reader tests (32) should also pass for Publisher

Sign-Off:

Tested By: _____ **Date:** _____

Next: BUSINESS_TEST_PLAN_SUPERUSER.md