

Document Snapshot

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DSM V2 Workflow Verification

Feature Overview

The Document Management System (DMS) has been upgraded to V2, introducing:

- Multi-Stage Reviews:** Assign multiple reviewers across different stages.
- Folder Permissions:** Granular access control for folders.
- Comments:** Discuss documents directly within the application.
- Acknowledgements:** Track user acknowledgement of approved documents.
- Withdrawal:** Creators can withdraw documents from review.

Verification Steps

1. Standard Review Flow

- Create Document:** Go to "New Document" and create a draft.
- Upload Version:** Upload a file to create version 1.0.
- Start Review:**
 - Click "Submit for Review".
 - In the modal, search for users and add them.
 - Assign different stages (e.g., User A -> Stage 1, User B -> Stage 2).
 - Click "Start Review".
- Verify Status:**

- Document status should change to SUBMITTED.
- "Reviews" tab should show the reviewers.

5. Reviewer Action (User A):

- Log in as User A.
- Go to the document.
- In "Reviews" tab, click "Approve".
- Status remains SUBMITTED (if Stage 2 exists).

6. Reviewer Action (User B):

- Log in as User B.
- Approve the document.
- Document status changes to APPROVED.

2. Rejection Flow

1. Start Review: Submit a document with a reviewer.

2. Reject:

- Log in as Reviewer.
- Click "Reject" in "Reviews" tab.
- Enter a rejection reason.

3. Verify:

- Document status changes to REJECTED.
- Audit log records the rejection reason.

3. Withdraw Flow

1. Start Review: Submit a document.

2. Withdraw:

- As the creator, click "Withdraw" in the document header actions.

3. Verify:

- Document status changes back to DRAFT.

- Reviews are cancelled.

4. Comments & Acknowledgements

1. Comments:

- Open any document.
- Go to "Comments" tab.
- Post a comment and verify it appears.

2. Acknowledgements:

- Open an APPROVED document.
- Check the "About" tab (Right Column).
- Click "I Acknowledge".
- Verify the banner updates to "Acknowledged on [Date]".