### Test Script M&R/CLARA/L&E/2022/006/0011

### Matter(006)/Case assignment(0011)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Matter Case Assignment Created/updated/deleted Successfully | | | |

***Process***

| **Process** | **Step #** | **Steps** | **Expected Results** | **Actual Results** | **Pass/Fail/**  **Not executed** |
| --- | --- | --- | --- | --- | --- |
| Login | 1 | Enter the User ID and Password in the login page | Should be able to Login successfully and open the landing page |  |  |
| Case assignment | 2 | Click the Menu and navigate to MATTER and click CASE MANAGEMENT button | Has to open the Case Management List page |  |  |
|  | 3 | Should display all the Assigned case records based on L&E and Immigration |  |  |
| Search | 4 | Click Search button | Has to open the search criteria fields |  |  |
| 5 | Search Options can be single or multiple. Enter the required search field values and click search. This will update the list page records according to the search |  |  |
| 6 | Click Reset button | On Clicking reset will clear the search field values and will make all the fields as blank & Click search again will provide the unfiltered list |  |  |
| Options | 7 | Click Options button | Will display the required options for this screen |  |  |
| 8 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |
| List search / filter | 9 | Enter the required values in the Search field on the top of list page | Will filter the records according to search criteria in the list page |  |  |
| New Assignment | 10 | Select a Matter from Matter Management page and Click Options button and then click Assign icon | Has to open the Case Assignment screen with below tabs and fields |  |  |
|  |  |  | **General tab** |  |  |
|  | 11 |  | Client ID- Auto filled for the selected Matter |  |  |
|  | 12 |  | matter ID- Auto filled for the selected Matter |  |  |
|  | 13 |  | Case Category - Auto filled for the selected Matter |  |  |
|  | 14 |  | Case Sub Category - Auto filled for the selected Matter |  |  |
|  | 15 |  | Partner - Select the Partner for the case from dropdown |  |  |
|  | 16 |  | Case Open Date- Auto filled for the selected Matter |  |  |
|  |  |  | **Fee Details** |  |  |
|  | 18 |  | Fees type - Auto filled from the Accounting details of the Matter |  |  |
|  | 19 |  | Flat fee rate - Auto filled from the Accounting details of the Matter |  |  |
|  | 20 |  | Admin Cost - Auto filled from the Accounting details of the Matter |  |  |
|  |  | Will display the list of Timekeepers in this tab | **Resource Details** |  |  |
|  | 21 |  | Assign Originating, Responsible, Assigned timekeepers for the timekeeper type Attorney |  |  |
|  | 22 |  | Assign Legal Assistant for the time keeper type Legal assistant |  |  |
|  | 23 |  | Assign Law clerk for the time keeper type Law Clerk |  |  |
|  | 24 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 25 |  | On Clicking Assign button, 1. will assign the timekeepers for the selected Matter 2. Receive success Message |  |  |
| Cancel Assign | 26 |  | On Clicking cancel button, Close the Pop-up screen and go back to Matter List page |  |  |
| Update Assignment | 27 | Select a Matter from Case Assignment list page and Click Assign button | Has to open the Case Assignment update screen with below tabs and fields 1. Validation: If Case status is Closed, Assignment update is not possible |  |  |
|  |  |  | **General tab** |  |  |
|  | 28 |  | Client ID - Non-Editable |  |  |
|  | 29 |  | matter ID- Non-Editable |  |  |
|  | 30 |  | Case Category - Non-Editable |  |  |
|  | 31 |  | Case sub Category - Non-Editable |  |  |
|  | 32 |  | Partner - Non-Editable |  |  |
|  | 33 |  | Case Open Date- Non-Editable |  |  |
|  |  |  | **Fee Details** |  |  |
|  | 34 |  | Fees type - Non-Editable |  |  |
|  | 35 |  | Flat fee rate - Non-Editable |  |  |
|  | 36 |  | Admin Cost - Non-Editable |  |  |
|  |  | Will display the list of Timekeepers in this tab | **Resource Details** |  |  |
|  | 37 |  | Change Assignment for Originating, Responsible, Assigned timekeepers for the timekeeper type Attorney |  |  |
|  | 38 |  | Change Assignment for Legal Assistant for the time keeper type Legal assistant |  |  |
|  | 39 |  | Change Assignment for Law Clerk for the time keeper type Law Clerk |  |  |
|  | 40 |  | validation - Error message will be Popped up if Mandatory fields are not filled |  |  |
|  | 41 |  | On Clicking Assign button, 1. will re assign the timekeepers for the selected Matter 2. Receive success Message |  |  |
| Display Assignment | 42 | Select a Matter and Click Assignment button and then click display icon | Has to display the Assignment details for the selected matter |  |  |
| Delete Matter | 43 | Select a Matter from Assignment page and Click Options button and then click delete icon | Should not allow when the Case status is closed |  |  |

***Confirmation / Approval of Testing Results***

**Overall Testing Status:**

Pass and accepted

Passed with note \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Failed

**Comments:**

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**Approved by :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date :** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_