### Test Script M&R/CLARA/L&E/2022/008/0005

### Reports(008)/L&E MATTER(0005)

***General Information***

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| --- | --- | --- | --- |
| **Tester Details** | |  |  |
| **Name** | **User ID** | **Tested Environment** | **Tested Date** |
|  |  | Pre-Production |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Expected Results:**  Report L&E Matter 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 |  |  |
| L&E Matter | 2 | Choose Menu, navigate to Reports and then Click Matter Management followed by L&E-Matter | Has to display the report generation page |  |  |
|  | 3 |  | New screen should open with below fields |  |  |
|  | 4 |  | Class ID-Auto Populate-Non-Editable |  |  |
|  | 5 |  | Case Categories - select the Case Category from dropdown - Optional |  |  |
|  | 6 |  | Case Sub Categories - select the Case Sub Category from dropdown - Optional |  |  |
|  | 7 |  | Billing Mode - select the Billing Mode from dropdown - Optional |  |  |
|  | 8 |  | Date Opened - select the start date and end date from calendar for opened date - Mandatory |  |  |
|  | 9 |  | Date Closed - select the start date and end date from calendar for closed date - Optional |  |  |
|  | 10 |  | Status - select the Status from dropdown - Mandatory |  |  |
|  | 11 |  | Referred By - select the Referred By from dropdown - Optional |  |  |
|  | 12 |  | Case Sold By - select the Case Sold By from dropdown - Optional |  |  |
|  | 13 |  | Partner - select the Partner from dropdown - Optional |  |  |
|  | 14 |  | Main Attorney - select the Main Attorney from dropdown - Optional |  |  |
|  | 15 |  | Assigned TK - select the Assigned TK from dropdown - Optional |  |  |
|  | 16 |  | Legal Assistant - select the Legal Assistant from dropdown - Optional |  |  |
|  | 17 |  | Law clerks - select the Law clerks from dropdown - Optional |  |  |
|  | 18 |  | On Clicking Execute button will display the below tabs and fields in the new screen |  |  |
|  |  |  | **L&E Matter** |  |  |
|  | 19 |  | Matter File |  |  |
|  | 20 |  | Client ID |  |  |
|  | 21 |  | Active/Inactive |  |  |
|  | 22 |  | Case Sub Category |  |  |
|  | 23 |  | Case Category |  |  |
|  | 24 |  | Matter Description |  |  |
|  | 25 |  | Billing Mode |  |  |
|  | 26 |  | Matter Opened Date |  |  |
|  | 27 |  | Matter Closed Date |  |  |
|  | 28 |  | Created By |  |  |
|  | 29 |  | Updated by |  |  |
|  | 30 |  | Referred by |  |  |
|  | 31 |  | Corp. Name/Client Name |  |  |
|  | 32 |  | Case Sold By |  |  |
|  | 33 |  | Assigned Assistant |  |  |
|  | 34 |  | Atty. Handling case |  |  |
|  | 35 |  | Attorney's Notes |  |  |
|  | 36 |  | Matter Type |  |  |
|  | 37 |  | Reference |  |  |
|  | 38 |  | Location of the File |  |  |
|  | 39 |  | Defendant |  |  |
|  | 40 |  | Cause Number |  |  |
|  | 41 |  | Opp. Party- Name |  |  |
|  | 42 |  | Plaintiff |  |  |
|  | 43 |  | Opp. Party - Email |  |  |
|  | 44 |  | Opp. Party - Phone |  |  |
|  | 45 |  | Opp. Counsel- Name |  |  |
|  | 46 |  | Opp. Counsel - Email |  |  |
|  | 47 |  | Opp. Counsel - Phone |  |  |
|  | 48 |  | Judge Name |  |  |
|  | 49 |  | Court Email |  |  |
|  | 50 |  | Court Phone |  |  |
|  | 51 |  | Agency Name |  |  |
|  | 52 |  | Agent Name |  |  |
|  | 53 |  | Agent Email |  |  |
|  | 54 |  | Agent Phone |  |  |
|  | 55 |  | Schedule Date |  |  |
|  | 56 |  | Task Date |  |  |
|  | 57 |  | Task To Do |  |  |
| Options | 58 | Click Options button | Will display the required options for this screen |  |  |
| 59 | Click Download icon from Options | Will down the list page records in Xlsx format |  |  |

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

**Overall Testing Status:**

Pass and accepted

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

Failed

**Comments:**

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

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

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