Information Management Research Applications Development

EDMS RightSite 4.3 Upgrade

Validation Protocol

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| --- | --- |
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| **Version:** | 0.1 |
| **Date:** | May 9, 2002 |

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Document History

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Updated By | Comments |
| Draft V1 | mm/dd/yyyy | John Doe |  |
| 0.1 | 5/09/2014 | Hedrick | Created using Requirements document. |
| 0.2 | 8/16/2014 | Portman | Reconciled with Validation Plan |

Document Approval

The following signatures indicate approval of this document and its content.

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[INSTRUCTIONS - To update these fields, click on the item(s) and press F9.]

Acronyms

|  |  |
| --- | --- |
| Acronym | Description |
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# Introduction

## Document Purpose

You may keep the text below as is.

The Validation Protocol document contains the Validation Procedures and will conducted according to the corresponding Validation Plan.

You can start the Validation Protocol document early in the project life cycle (during detailed requirements definition) in conjunction with the System Test Protocol document. This provides the time needed to analyze the breadth of the required testing activities and plan for test design, execution, and completion.

## Document Organization

You may keep the text below as is.

The remainder of this document is organized as follows:

* Section 2 , Validation Strategy, contains the test levels and objectives, hardware and software required for validation, Resource and training requirements
* Section 3 contains a summary of the completed System Testing
* Section 4, Validation Methodology, explains the scope of validation, the organization and sequencing of validation procedures
* Section 5, Validation Procedures, contains the actual validation procedures

## Project Background

This document contains the Validation Protocol for the RightSite 4.3 Server Upgrade. The RightSite Server is being updated to the latest version, 4.3, in order to address several known problems in the user community. These are:

* The current version does not work correctly with any Internet Explorer Versions greater than 5.0.
* The system cannot view the PDF Rendition as the default view (RightSite Bug).
* PDF files with long character names cannot be viewed (RightSite Bug).

This validation is being done to ensure that the modifications are working correctly and that the functionality of the system is not broken with any changes made or the upgraded software.

This section contains general information including a functional description of the system, how it supports the business activities, and similar information. How this system relates to other existing and future systems should be discussed.

Target begin and end dates for validation activities, and of system operational status should be indicated, if possible.

## Related Documents

List documents referenced in or related to this document. The versions of the Detailed Requirements and/or Detailed Design Document(s) that this protocol has been written against should be indicated.

|  |  |  |
| --- | --- | --- |
| Document Name | Version # | Location |
| EDMS RightSite 4.3 Upgrade  Validation Plan |  |  |
| EDMS Detail Functional Requirements |  |  |

# Validation Strategy

## Testing Levels and Objectives

### Testing Objectives

This protocol is written to accomplish the following testing objectives to ensure:

* Off-the-shelf RightSite functionality works as intended;
* Customized RightSite functionality works as intended;
* RightSite testing considers variation in user location and desktop environment.

### Testing Levels

There are various levels of testing being done. Three different types of users are being tested. These are the Consumers, Contributors and Coordinators. Different functionality is being tested at each of these levels.

#### Consumers

The Consumers Script contains the following functions:

* Login
* check wrong password
* navigate
* view of all document types (xml, word, excel, power point, microsoft project, html, pdf, xml, sas output?, visio?)
* no edit capability,
* no permissions,
* external web pages links & queries,
* searching for documents (verify all attributes appear on search pages.

#### Contributors

The Contributors Script is validating the following functionality:

* Log In,
* create new sdm document,
* import pdf dociument,
* import report??, clinical minutes,
* creating new folders, setting permissions
* setting attributes – all required ones, missing required ones
* Editing documents,
* check out
* check in
* cancel checkout
* linking objects
* delete when first import
* delete in draft
* csf files imported by glims

#### Coordinators

* Issuing documents
* Navigate
* Delete old copies
* Change acls
* Check properties set
* Move document to issued
* Render PDF
* Clinical Protocol Change
* Check out in issued
* modify, try to check in as same version-> gets error
* Export from issued & reimport to draft
* modify in draft, Move to Issued and render
* Export,
* No delete in final except when 1st placed there
* Official delete process when not owner

Login, check wrong password, navigate**, view of all document types (xml, word, excel, power point, microsoft project, html, pdf, xml, sas output?, visio?), no edit capability, no permissions, external web pages links & queries, searching for documents (verify all attributes appear on search pages**Define the testing levels and objectives as needed for your project.

Example Text:

Validation will be performed in the production environment. The validation will follow the logical order of the business process of entering and updating Projects and Milestones. The system testing will include all error testing; therefore, there is no need to perform stress testing and test field limits on this system.

## System Requirements

System Requirements involve duplicating the various desktops present within the User Community, duplicating the current production environment as best as is possible.

This section contains a description of the system and Validation environment. The Validation environment should represent the eventual production environment as closely as possible. The descriptions that follow should indicate any deviations in the Validation environment from the expected production environment.

### Hardware Configuration

The testing will occur using standard desktop PCs connecting to the servers containing the

Docbases through the internal network.

List any hardware required to be in place for the testing to take place, including host computer, desktop workstations, servers, disk drives, etc. Any hardware limitations of the system (such as what monitors the system can **not** function with) should be listed.

Indicate the physical and logical configuration of the hardware. For new hardware installations, include any environmental requirements, wiring needed, and installation qualifications. Incorporate by reference an Acceptance plan for the hardware and its installation.

Include any figures or diagrams that clarify the relationship between the different components of the system. Reference can be made to other documents such as the Application Technical Architecture document, or the appropriate technical architecture document, provided they contain this information and they are current and approved documents.

### Software Configuration

The testing will occur on three different desktops:

* Desktop 1
* Desktop 2 Version 1
* Desktop 2 Version 2

Describe the configuration of the software required to execute the test/validation procedures, particularly any system or third party product required. Include version numbers for all software, including vendor software.

### Software Developer

The software being validated was developed by Documentum. Several modifications were made by the in-house development team headed by Vincent Heenan.

Indicate the department(s) developing the software. If multiple departments are involved, specify the development responsibilities of each department.

If the software or some part of it is being developed by a contractor/vendor to Wyeth-Ayerst, include this information along with the name and telephone number of the contact person at the contractor/vendor. Reference any appropriate vendor-provided documentation, and any Vendor Evaluation documentation that may have been developed.

### Source Code

N/A

Identify the source code language used for the system. If the software was written to operate in a particular implementation of a language, this should be indicated.

### Libraries/Directories

N/A

Identify the program and data libraries where the software files, data files, and databases will be stored. Identify the security requirements for the environment and ensure testers will have the proper security access to perform validation.

### Migration of Software and Data

The upgrade was done to the server. Existing enhancements are on the Intranet client interface.

Document procedures for migrating software and data into the Validation environment.

Example text:

Normal Configuration Management procedures will be followed.

Determine the types of data and sources that will be needed to validate the system. Examples of types of data are:

* data that needs to be sent to and received from interfacing applications
* types and amount of data that will be required from the existing system
* new data not currently found in the enterprise database

Identify how data will be established for the Validation environment. Options to consider include:

* Copy data from the Production environment
* Manual data entry
* Custom load/conversion

### Backup and Recovery Needs

N/A

Document the Backup and Recovery requirements for the Validation environment. Consider all aspects of the Validation environment (software libraries, data files, databases, etc.) and the potential impacts of downtime in Testing. .

Example text:

All program libraries, data files, and databases will be stored on a server that is backed up daily.

## Resource Types and Training Needs

Several resources are being used in the testing.

Document the resource types that will be needed to successfully validate the application. As you identify specific resources, identify any training needed for those resources to be able to test effectively. Possible areas of training to consider include testing tools, systems software, support software, operating system, database structure, and standard operating procedures.

The specific resources and their training needs are documented below:

|  |  |  |
| --- | --- | --- |
| **Resource** | **Location** | **Training Needs** |
| Mary Hedrick | Glassboro, NJ | None |
| Dawn Anthony - | Owego, NY | None |
| Barbara Jacoby - | Owego, NY | None |
| Caroline O'Leary - | Boston, MA | None |
| Lindsay Foulks - | Baulkam Hills, Australia | Application |
| Karen Darling - | Rochester, NY | None |

# System Test Evaluation

Include a statement about the evaluation of the System Test activities. This statement should indicate how the evaluation was performed (review of documents, meeting/discussion), and if the results of the System Test are acceptable.

# validation Methodology

## General Information

Explain the general methodology to be used in the validation efforts. Include, if applicable, a description of the strategy/general approach used to develop the test procedures. This may include a description of the depth of testing being performed on the system and areas of the system that are being excluded from testing (such as screen navigation possibilities or field limits not tested for every screen).

## Organization of Validation Procedures

Describe the way the procedures are to be organized. Frequently, the structure of the testing procedures or the software itself creates dependencies that influence the timing and ordering of the execution of procedures. For example, often one function of a system uses as input the output of another function of the system. The validation procedures should require that the first function be verified and is functioning properly before moving onto the second function. Interdependencies such as this should be identified here and accounted for in the overall validation plan.

|  |  |
| --- | --- |
| Test Procedures | |
| Test Procedure Number | Test Cases/Scripts Included |
| GUI Test Procedure #3 | Customer Entry, Customer Update, Customer Delete |
|  |  |
|  |  |
|  |  |

## Validation Data Files

There are various validation data files used inside of the docbase.

Define the form and content of any data files to be used for the validation effort. Testing involving data limits, exceptional data cases, boundary conditions, or user input errors should be oriented towards those situations that are relevant to the user’s functional use of the system within their business environment.

## Statistical Methods for Evaluating Results

There are no statistical methods being used to evaluate results.

List any statistical methods that will be used to evaluate the results of the procedures. If any methods that will be used will be specific to a procedure, indicate this here.

## Test Case/Requirements Traceability

See traceability matrix

# validation Procedures

This section contains the test cases and scripts needed to verify that the requirements are met. A test case describes what is being tested and a test script is the detailed procedures for executing a test case. See the forms that follow this page for the test cases/scripts.

## Validation Cases

## Validation Scripts for Test Case IC-RS43-AR4-IE5

Working with Docbases

Working with Documents

Linking Objects

Deleting Objects

Moving Objects

Copying Objects

Creating Link References

Lifecycles

Routing Objects

Using the Inbox

Working with Cabinets and Folders

Navigating the Hierarchy of Cabinets and Folders

Virtual Documents

Assemblies

Searching the Docbase

Object Properties (a.k.a. Attributes)

Permission Sets (a.k.a. ACLs)

Task Manager

Renditions

Reporting Requirements

Interfaces with Other Systems

Conversion Requirements

Non-Functional Requirements

Data Requirements

21 CFR Part 11 Requirements

Security Requirements

Transaction Requirements

Service and Support Requirements

System Administration

Documentum Administrator

4.10.2 RightSite Administrator 3.1.20 User Interface There are three formats available to use for recording test procedures: Procedure Form Format 1, Procedure Form Format 2, and Text Outline. Using one of the Procedure Forms, list each procedure and the information required. Use of a Procedure Form is recommended as it provides a uniform method for designing and documenting the results of the system testing effort. The tables may be included in an appendix and referenced in this section.

Alternatively, each procedure may be described in outline format as shown below.

### [Using Your Inbox](#contents_inbox)Consumers Script

#### Logon

* Logging on with invalid user id/password,
* Logging on with valid user id and password
* Logging on from failed logon screen

#### Permissions

* Navigate
* Verify user without write access cannot edit a docoment.
* Verify permissions

#### Viewing Documents

* View document of all format types (Word, PDF, XML,HTML, GIF, Excel, PowerPoint)
* Default View is PDF if available, otherwise Native format.

#### Linking to documents

#### Web Page

#### Searching

#### External Links on Web Pages

#### Log Out

### Contributors Script

#### Logon

#### Create New Folder & document

* Create New Folder
* Create New Document

#### Import

#### Permissions

#### Setting Attributes

* Set attributes for all document types; ensure all work correctly.

#### Editing

#### Cancel Checkout

#### Link Document

#### Export

#### Log Out

### Coordinators Script

#### Log In

#### Move to Issued

#### Export Final Document

#### Import Final Document

#### Delete

#### Move Folder

#### Copy

#### Log Out

Important: During Validation, any failed procedures must be retested after the problem has been addressed. **. Failed tests and subsequent retests must be included in either in the executed Validation Protocol, or the Validation Report. They must be included as either as descriptions of the problem, resolution and retest results, or an additional copy of the procedure form showing the results of the retest.**

Use the form that follows to document your test cases, customizing it as needed for your project. When the procedures are executed, the table is used to record the results. The completed tables are then incorporated into the Validation Report, as appropriate.

**Field Description**

Tested System Name of the system being tested/validated

Test Type The type of test being performed, and/or the portion of the system being tested. Usually, the procedure can be categorized as type System, Module, Unit, Integration, or Validation

Test Plan Version The Version number of the individual procedure

Test Object The name function of the system being exercised in the procedure.

Version For Validation, enter N/A

Validation ID Description of the procedure, or a unique number identifying the procedure.

Type and Purpose The type of procedure and a short description of what the procedure tests/validates.

Input Special data sets ort other test data and location.

Procedure The action the person executing the procedure should perform, specified either by function(“Select the Open function”) or by keystroke/action(“Move the cursor to the Open icon and press the mouse button”). A functional description is preferred for Validation Testing.

Expected Results Indicate what should happen in response to the actions listed in the Procedure section. This description should clearly state what system response(s) are necessary for the procedure to be considered successful.

**Recording Testing/Validation Procedure Results-Form Format #1**

1. For each step of a procedure, note the actual results in the **Actual Results** field. If the Procedure for that step indicates a particular action such as recording a result, copying a screen, etc. make sure that action is performed.
2. Insert the initials of the person executing the procedure and the Date/Time it was run.
3. If any documents must be attached to the table to show the results of that procedure step (Screen prints, reports, etc.) the attachments should be numbered or otherwise uniquely identified, and that identifier inserted in the **Attachment Ref.**  field. If the procedure fails and a Test Incident Report Form is used, insert the number assigned to that form in this field.
4. Indicate the acceptance of the procedure step results in the **Pass/Fail** column. Any failed entries in this column should be retested after the problem has been addressed.
5. Once all the procedures have been executed and passed, the Validation Report can be created.

Use the form that follows to document your test cases, customizing it as needed for your project. Copy/paste to create one test procedure per form. The form is set up so that each new form/test procedure starts on a new page and so that the requirement/use case description is added to the Table of Contents when it is recalculated. If you are using an automated testing capture/playback tool, the tool may be capable of reporting some or all of this information.

**Field Description**

Tested System Name of the system being tested/validated

Test Type The type of test being performed, and/or the portion of the system being tested. Usually, the procedure can be categorized as type System, Module, Unit, Integration, or Validation

Test Plan Version The Version number of the individual procedure

Test Object The name of the component function of the system being exercised in the procedure.

Version For Validation, enter N/A

Test Goal # n The purpose of the procedure Example: To exercise the reporting function. The n should be replaced with the sequence number assigned to requirement from the Detailed Requirements and Preliminary Design Document

Description More detailed information about the purpose of the procedure, if needed.

Test Case # n For procedures that must be executed repeatedly with different test data, replace the n with sequential numbering to these cases and describe them on separate forms.

Description Describe the test data used for this procedure

Step # Procedure Step Number

Test Prerequisites/Data Indicate any prerequisite conditions or input data needed for this procedure step

Test Execution The action the person executing the procedure should perform, specified either by function(“Select the Open function”) or by keystroke/action(“Move the cursor to the Open icon and press the mouse button”). A functional description is preferred for Validation Testing.

Expected Results Indicate what should happen in response to the actions listed in the Test Execution field. This description should clearly state what system response(s) are necessary for the procedure to be considered successful.

**Recording Testing/Validation Procedure Results –Form Format #2**

1. For each step of a procedure, note the actual results in the **Test Results** field. If the Procedure for that step indicates a particular action such as recording a result, copying a screen, etc. make sure that action is performed.
2. If any documents must be attached to the table to show the results of that procedure step (Screen prints, reports, etc.) the attachments should be numbered or otherwise uniquely identified, and that identifier inserted in the **Documentation** field. If the procedure fails and a Test Incident Report Form is used, insert the number assigned to that form in this field.
3. The person executing the procedure must complete the **Tester Name, Initials** (actual handwritten initials), and **Date/Time**.
4. If another person reviews this form that person must complete the **Reviewer Name, Initials** (actual handwritten initials), and **Date/Time**.
5. Once all the procedures have been executed and passed, the Validation Report can be created.

## Test Summary Report

### IC-RS43-AR4-IE5

This test cases tests the Intranet Client to EDMS using RightSite 4.3, Acrobat Reader 4.0, and Internet Explorer 5.0.

Logging in

Create new word document in draft cabinet-sdm type; sdm template

Have someone try to edit document when checked out

Checkin as same version

Request PDF rendition

Edit document, try to check in as same version – ok

Create new word sdm document in issued

Checkin as same version

Use the Test Summary Report form to capture the summary results of all the test cases. This form is designed to be used as a high level summary for review of test results with management. Ensure that each entry in this document is tied back to the related test case and requirement/use case from the Validation Protocol document.

#### Consumers Script

| **ID** | **Step** | **Input or Prequisites** | **Procedure** | **Expected results** | **Actual Results** | **Initials & Date/Time** | **Attachment Ref.** | **Pass/ Fail** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 1 |  | Open Internet Explorer Window | IE Window Opens |  |  |  |  |
|  |  |  | Go to web address  http://sdwaprsite02/rs-bin/RightSite.dll/ssi4  Click the Docbases icon on the toolbar. | The docbases window appears. |  |  |  |  |
|  |  |  | Click the name of the Docbase to which you want to connect: tedms-QA | The Log In page appears. |  |  |  |  |
|  |  |  | Click Cancel | The docbases window appears. |  |  |  |  |
|  |  |  | Click the name of the Docbase to which you want to connect: tedms-QA | The Log In page appears. |  |  |  |  |
|  |  | Train10 | Type your user name. |  |  |  |  |  |
|  | Incorrect password | User1 | Type an Incorrect password. |  |  |  |  |  |
|  |  | N/a | If required, type the Windows NT domain name. |  |  |  |  |  |
|  |  |  | Click Log In. | The Login Failed screen appears. |  |  |  |  |
|  |  |  | Click Cancel | The Docbases window appears |  |  |  |  |
|  |  |  | Click the name of the Docbase to which you want to connect: tedms4i | The Log In page appears. |  |  |  |  |
|  |  | Train10 | Type your user name. |  |  |  |  |  |
|  | Correct login | Train10 | Type your password. |  |  |  |  |  |
|  |  |  | If required, type the Windows NT domain name. |  |  |  |  |  |
|  |  |  | Click Log In. | The docbase window appears. |  |  |  |  |
|  | Navigate | Draft: Information Management/RightSite 4.3 Testing folder | Select +/- to get to the correct folder | The Folder opens. All documents in the folder are shown. |  |  |  |  |
|  | Verify Title Shown | All documents in folder. | Look at the line below the name of the object; select properties link next to the first document with a line below the name. | The properties page appears. Verify the line below is the same as the title of the document. |  |  |  |  |
|  |  |  | Click the back button on the toolbar. | The screen returns to the folder contents. |  |  |  |  |
|  | Verify Permissions |  |  |  |  |  |  |  |
|  | No Edit capability | All documents in folder | Look at the links next to the documents. | There are no edit links next to the documents in the folder only properties only Properties and Actions. |  |  |  |  |
|  | No write, or higher permissions |  | Select Permissions link next to the first document. | The Permissions screen is displayed. Your permissions starts with ‘Read’; At the bottom of the screen it says ‘You do not have permission to choose a different permission set.’ |  |  |  |  |
|  |  |  | Click the Actions link next to the first document. | The actions screen appears. The following links are shown:  View, Export, Properties, Permissions. |  |  |  |  |
|  | Navigate | Information Management/RightSite 4.3 Testing folder | Select +/- to get to the correct folder | The Folder opens. All documents in the folder are shown. |  |  |  |  |
|  | Verify Permissions |  |  |  |  |  |  |  |
|  | No Edit capability | All documents in folder | Look at the links next to the documents. | There are no edit links next to the documents in the folder only properties only Properties and Actions. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | View Word Doc w PDF Rendition |  |  |  |  |  |  |  |
|  | View Word Doc w PDF Rendition | Test Word w PDF doc | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  |  |  | Click Back Button. | Folder contents displayed. |  |  |  |  |
|  | View Word Doc w PDF Rendition | Test Word w PDF doc | Click on the document link. | The Document should appear in Acrobat Reader. Open to the 1st page. |  |  |  |  |
|  | Validates moving to the end of the document. | N/A | Click the double right arrow (|). | The document moves to the last page; the page number matches the count at the bottom of the screen. |  |  |  |  |
|  | Validates paging through. | N/A | Click the back arrow key () | Document turns to the next to last page. |  |  |  |  |
|  | Validates moving to the beginning. | N/A | Click the double back arrow button (|) | Document returns to the beginning. |  |  |  |  |
|  | Validates paging. | N/A | Click the Single forward button (). | Document moves to the second page. |  |  |  |  |
|  | Validates Scrolling | N/A | Click on the down scrollbar until the document moves to the next page. | Document moves to the next page. |  |  |  |  |
|  | Validates printing and tables. | N/A | Select File-> Print. | A dialog box is displayed with print information. |  |  |  |  |
|  | Validates printing the document and tables. | N/A | Choose a standard Wyeth Printer to which to print.  Click ‘OK’. | The document prints. Match the pages 1,13-14 and last page to the ones attached as Appendix B. |  |  |  |  |
|  | Close Acrobat | N/A | Select File-> Exit | Acrobat Reader closes.  User is returned to EDMS. |  |  |  |  |
|  | Verifiy document not saved. | Test Word w PDF doc | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  |  |  | Click Back Button. | Folder contents displayed. |  |  |  |  |
|  | Test view PDF doc | Test PDF Document | Click on the Properties link for this document. | Record the document’s Modified Date. |  |  |  |  |
|  |  |  | Click Back Button. | Folder contents displayed. |  |  |  |  |
|  |  | Test PDF Document | Click on the document link. | The Document should appear in Acrobat Reader. Open to the 1st page. |  |  |  |  |
|  | Check bookmarks | N/A | Click on the Bookmarks tab. | 10 bookmarks are shown matching Appendix B. |  |  |  |  |
|  |  |  | Close | Document is closed. |  |  |  |  |
|  |  |  | Select File->Exit | Acrobat Reader exits, user is returned to workspace. |  |  |  |  |
|  | View Word Doc w no PDF Rendition |  |  |  |  |  |  |  |
|  |  |  | Navigate back to the Draft: Information Management/RightSite 4.3 Testing folder and click. | The Folder opens; the contents are displayed. |  |  |  |  |
|  | View Word Doc w no PDF Rendition | Test Word w NO PDF doc | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  |  |  | Click Back Button. | Folder contents displayed. |  |  |  |  |
|  | View Word Doc w no PDF Rendition | Test Word w no PDF doc | Click on the document link. | The document opens inside of Word. |  |  |  |  |
|  |  |  | Use the scroll arrows to scroll two pages through the document. | The document scrolls two pages. |  |  |  |  |
|  |  |  | Select File->Print | A Print dialog box is displayed. |  |  |  |  |
|  |  |  | Choose a standard  Wyeth printer, click ‘ok’. | The document prints to the selected printer. Ensure document printed correctly. |  |  |  |  |
|  |  |  | Click on line 1, type ‘abcd’ | Text is entered on line 1. |  |  |  |  |
|  |  |  | Click Save | Message displayed ‘Document is read-only’. Dialog box displayed for new name. |  |  |  |  |
|  |  |  | Click Cancel.  Click the Close (X) button. | Message displayed ‘Do you want to save changes?’ |  |  |  |  |
|  |  |  | Click No | Document is closed |  |  |  |  |
|  |  |  | Select File->Exit. | Application is closed; User returned to EDMS window with no changes made to the document. |  |  |  |  |
|  | Verifiy document not saved. | Test Word w no PDF doc | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  |  |  | Click Back Button. | Folder contents displayed. |  |  |  |  |
|  | View Excel worksheet |  |  |  |  |  |  |  |
|  | Navigate |  | Navigate back to Information Management/RightSite 4.3 Testing folder and click. | The Folder opens; the contents are displayed. |  |  |  |  |
|  | View Excel worksheet | Test Excel worksheet | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  | View Excel worksheet | Test Excel worksheet | Click on the document link. | The document opens inside of Excel. |  |  |  |  |
|  |  |  | Use the scroll arrows to scroll two pages through the document. | The document scrolls two pages. |  |  |  |  |
|  |  |  | Select File->Print | A Print dialog box is displayed. |  |  |  |  |
|  |  |  | Choose a standard  Wyeth printer, click ‘ok’. | The document prints to the selected printer. Ensure document printed correctly. |  |  |  |  |
|  |  |  | Click on line 1, type ‘abcd’ | Text is entered on line 1. |  |  |  |  |
|  |  |  | Click Save | Message displayed ‘Document is read-only’. |  |  |  |  |
|  |  |  | Click Cancel. Click the Close (X) button. | Message displayed ‘Do you want to save changes?’ |  |  |  |  |
|  |  |  | Click No | Document is closed |  |  |  |  |
|  |  |  | Select File->Exit. | Application is closed; User returned to workspace window with no changes made to the document. |  |  |  |  |
|  | Verifiy document not saved. | Test Excel worksheet | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  | View PowerPoint Presentation |  |  |  |  |  |  |  |
|  | Navigate |  | Navigate to the Draft: Information Management/RightSite 4.3 Testing folder | The Folder opens; the contents are displayed. |  |  |  |  |
|  | View PowerPoint Presentation | Test Powerpoint pres | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  | View PowerPoint Presentation | Test Powerpoint pres | Click on the document link. | The document opens inside of browser with no toolbar/Options? Is this always?? |  |  |  |  |
|  |  |  | Right Click in the window, Select Print. | A Print dialog box is displayed. |  |  |  |  |
|  |  |  | Choose a standard  Wyeth printer, click ‘ok’. | The document prints to the selected printer. Ensure document printed correctly. |  |  |  |  |
|  |  |  | Click  Back. | Folder contents is displayed. |  |  |  |  |
|  | Verifiy document not saved. | Test Powerpoint pres | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  | View HTML Document |  |  |  |  |  |  |  |
|  |  | Test HTML doc | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  | View HTML Document | Test HTML doc | Click on the document link. | The document opens inside of browser with no toolbar/Options. |  |  |  |  |
|  |  |  | Right Click in the window, Select Print | A Print dialog box is displayed. |  |  |  |  |
|  |  |  | Choose a standard  Wyeth printer, click ‘ok’. | The document prints to the selected printer. Ensure document printed correctly. |  |  |  |  |
|  |  |  | Click  Back. | Folder contents is displayed. |  |  |  |  |
|  | Verifiy document not saved. | Test HTML doc | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | View Gif document |  |  |  |  |  |  |  |
|  |  | Test GIF doc | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  | View Gif document | Test GIF doc | Click on the document link. | The document opens inside of browser with no toolbar/Options. |  |  |  |  |
|  |  |  | Right Click in the window, Select Print | A Print dialog box is displayed. |  |  |  |  |
|  |  |  | Choose a standard  Wyeth printer, click ‘ok’. | The document prints to the selected printer. Ensure document printed correctly. |  |  |  |  |
|  |  |  | Click  Back. | Folder contents is displayed. |  |  |  |  |
|  | Verifiy document not saved. | Test GIF doc | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | View XML document |  |  |  |  |  |  |  |
|  |  | Test XML doc | Click on the Properties link for this document. | Record the document’s Modified Date |  |  |  |  |
|  | View XML document | Test XML doc | Click on the document link. | The document opens inside of browser with no toolbar/Options. |  |  |  |  |
|  |  |  | Right Click in the window, Select Print | A Print dialog box is displayed. |  |  |  |  |
|  |  |  | Choose a standard  Wyeth printer, click ‘ok’. | The document prints to the selected printer. Ensure document printed correctly. |  |  |  |  |
|  |  |  | Click  Back. | Folder contents is displayed. |  |  |  |  |
|  | Verifiy document not saved. | Test XML doc | Click on Properties next to document. | Verify document is not saved by comparing modified date to one recorded earlier – should be identical. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | Create a link in users home cabinet. |  | Navigate to the Draft: Information Management/RightSite 4.3 Testing folder | The folder is opened. |  |  |  |  |
|  |  |  | Next to the Test PDF Doc, click the actions link. | The actions page appears. |  |  |  |  |
|  |  |  | Select the Link the document link. | The Link document screen appears. |  |  |  |  |
|  |  |  | Select the users home cabinet: train10/ My cabinet.  Click Link. | The Link Succeeded page appears. Then the actions screen for the document appears. |  |  |  |  |
|  | Web page |  |  |  |  |  |  |  |
|  | Verify no Icons for removed functionality |  | Look at the toolbar. | Verify there are no icons for Checkout, WorkFlow, Smart Lists, or Custom Searches. |  |  |  |  |
|  | Searching the docbase | Search for different format types w/specific attributes and view! | Click the Search Icon on the Toolbar | The search screen appears. The default operator of search is defaulted to all. |  |  |  |  |
|  |  |  | Select the Document Drop down | A list of document types is presented. |  |  |  |  |
|  |  |  | For each document type in the list, view the attributes available in one of the attribute drop downs. | Verify that the list of attributes changes for the various doctypes. |  |  |  |  |
|  |  |  | Select any 3 types in the list. Each time pick the attributes: created, doc date and site. | Verify that created & doc date show date choices. |  |  |  |  |
|  |  |  | Select document type of ‘Clinical Protocol’ | Verify that Project Id presents a list of ids, Therapeautic Area presents list of areas and Site shows a list of Sites |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  | Choose type ‘clinical study file’ | The attributes drop downs are updated. |  |  |  |  |
|  |  |  | Select an attribute drop down and choose ‘format’ | The list of format types is created in the corresponding values. |  |  |  |  |
|  |  |  | Choose ‘Acrobat PDF’’ | The box is updated. |  |  |  |  |
|  |  |  | Click on the next attribute field and select ‘project id’ | The list of product numbers is provided. |  |  |  |  |
|  |  |  | Choose ‘0468E1’ from the list. | The item is selected. |  |  |  |  |
|  |  |  | Select next attribute drop down and select ‘Doc Type’ | A list of document types is listed in the drop down. |  |  |  |  |
|  |  |  | Select ‘ADVERSE EVENT INVESTIGATOR NOTIFICATION’ | The item is selected. |  |  |  |  |
|  |  |  | Click the ‘Start the search’ button | The search is done and 2 documents are returned. They are shown in alphabetical order. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  | Click on the top document. | The document is opened in Acrobat Reader. |  |  |  |  |
|  |  |  | Click on Criteria Link | The original criteria for the search is displayed. |  |  |  |  |
|  |  |  | Click the docbases link. | A page of the available docbases is displayed from which to search. |  |  |  |  |
|  |  |  | Select doc type of ‘minutes’ | Minutes is selected |  |  |  |  |
|  |  |  | Click the Start Search button | Search is performed. 4 documents are shown. No query string is shown. Documents are shown in alphabetical order.  Title is shown below name. |  |  |  |  |
|  |  |  | Click the criteria link. | The query is shown. |  |  |  |  |
|  |  |  | Select the attribute ‘Therapeutic area’ | Select ‘Vaccines’ |  |  |  |  |
|  |  |  | Click the Start Search button. | 2 documents are shown. |  |  |  |  |
|  |  |  | Click the Criteria link. | The search query is shown. |  |  |  |  |
|  |  |  | Select Product number. | A list of product numbers is displayed. |  |  |  |  |
|  |  |  | Select ‘WAY-169347 ‘ | The item is selected. |  |  |  |  |
|  |  |  | Click the Start search button. | The search is started. 1 document is found. |  |  |  |  |
|  |  |  | Click on the document. | The minutes will view in Word. |  |  |  |  |
|  | Test External Links on Web Pages |  | Navigate to the Information Management\Rightsite 4.3 testing folder. Select the Test web Links document and click. | The document opens with several links in it – for each link there are expected results. |  |  |  |  |
|  | Test get content of a latest version of a document from a page in production. |  | Click on the 1st link. | Takes you to a document in view mode. Document matches expected results. |  |  |  |  |
|  | Test get content of a folder from a page in production.  . |  | Click on the 2nd link. | Displays a folder with several files inside.  Results match expected results. |  |  |  |  |
|  | Query using the EDMSWebquery utility |  | Click on the 3rd link | Shows a list of files. Document matches expected results. |  |  |  |  |
|  | To get content of a document, this is based on object id. |  | Click on the 4th link. | Opens a file. Matches the results listed. |  |  |  |  |
|  | get content of latest version of a document. Version B |  | Click on the 5th link. | Opens a document. Verify it is the latest version of the document & matches results. |  |  |  |  |
|  | Open webquery doc with no access |  | Click on the 6th link. | User gets an appropriate error message. |  |  |  |  |
|  | Logging Out |  | Click the Disconnect icon on the toolbar. | The Confirm Log Out page appears |  |  |  |  |
|  | Verify can click cancel on logout |  | Click Cancel | Returns to Docbase |  |  |  |  |
|  |  |  | Click the Disconnect icon on the toolbar. | The Confirm Log Out page appears |  |  |  |  |
|  |  |  | Click Cancel | The docbase structure is shown – User is still logged in.. |  |  |  |  |
|  |  |  | Click the Disconnect icon on the toolbar. | The Confirm Log Out page appears |  |  |  |  |
|  |  |  | Click Log Out. | Log out Successfully completed window appears and then the docbases window appears. |  |  |  |  |
|  |  | Verify from Mywyeth | Go to my wyeth home page | MyWyeth is opened. |  |  |  |  |
|  |  |  | Go to Tools. – most used tools. Select edms. | The EDMS Home Page opens. |  |  |  |  |
|  |  |  | Click logon. | The logon dialog box appears. |  |  |  |  |

#### Contributors Script

Log In, create new sdm document, import pdf dociument, import report??, clinical minutes, creating new folders with special characters, playing with folders – setting attributes on folders

setting attributes;

required attributes,, all attributes, not any,

display mandatory in red;

set on documents,

pick lists

validate against radis – how do I check?

Accept and reject all valid values, etc

Date format as dd-mon-yyyy

Not lose changes w/no cancel

Lose changes when press cancel

editing documents, check out, check in, cancel checkout, linking objects; csf files imported byglims?; Edit a checked out document?; check document in as minor version draft & final cabs; check documents in as major version draft & final; disallow check-in of same version of issued document unless new; require reason for change of issued doc; add custom version label on checkin and view to see there; no link for assigning versions on actions page;no delete access to document

export document with extension –keep the extension not append it;

| **ID** | **Type /Purpose** | **Input** | **Procedure** | **Expected results** | **Actual Results** | **Initials & Date/Time** | **Attachment Ref.** | **Pass/ Fail** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Logging In |  | Open Internet Explorer Window | IE Window Opens |  |  |  |  |
|  |  |  | Go to web address  http://sdwaprsite02/rs-bin/RightSite.dll/ssi4  Click the Docbases icon on the toolbar. | The docbases window appears. |  |  |  |  |
|  |  |  | Click the name of the Docbase to which you want to connect: tedms4i | The Log In page appears. |  |  |  |  |
|  |  | train11 | Type your user name. |  |  |  |  |  |
|  | Correct login | train11 | Type your password. |  |  |  |  |  |
|  |  |  | Click Log In. | The docbase window appears. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | Create new folder |  | Click on the Information Management cabinet link | The cabinet is opened. |  |  |  |  |
|  |  |  | Select Actions link | The Actions page is displayed. |  |  |  |  |
|  |  |  | Choose the Create a New folder link under creating. | The Create Folder screen is displayed. |  |  |  |  |
|  |  |  | Type ‘Test Create folder ėāăě’ in the Name field. | The field is populated. |  |  |  |  |
|  |  |  | Click Create | The folder is created; a Post Create Options screen is shown letting the user Set Properties or Permissions. |  |  |  |  |
|  | Assign permissions |  | Click the Set Permissions link. | The Permissions page is shown. There is no option to set a User Permission. |  |  |  |  |
|  |  |  | Select the Choose a Different Permission Set Link. | The Choose Permission Set screen appears. |  |  |  |  |
|  |  | ACL w write permissions - Validation\_Test\_ACL | Choose the system ACL to apply.  Click Set this ACL. | The Confirmation screen appears. |  |  |  |  |
|  |  |  | Click continue | Successfully applied screen appears then returns to Post Create Options |  |  |  |  |
|  |  |  | Click Done | Returned to cabinet actions screen |  |  |  |  |
|  |  |  | Click Contents at the top of the page | Contents of the cabinet are displayed. Verify the folder is present with all the special characters in the name. |  |  |  |  |
|  |  |  | Select the just created folder, and click on actions link. | The Actions page is displayed. |  |  |  |  |
|  | Creating New Document |  | Click on the Create New document link. | The Create Document page is displayed |  |  |  |  |
|  |  |  | Enter Name: Test Clinical Protocol Type: Clinical Protocol  Format: Word 97/2000  Click Continue Create. | Another Create document page is displayed. |  |  |  |  |
|  |  |  | Select the template: Protocol Shell.  Click Finish Create | Msg Applet Loading.  The document is opened inside of Word. |  |  |  |  |
|  |  |  | Type ‘This is a test document for RightSite 4.3 validation.’ Select File-> Close. | Msg Displayed ‘do you want to save changes?’ |  |  |  |  |
|  |  |  | Click Yes | File is saved. |  |  |  |  |
|  |  |  | Click Close button for Word (X). | Word is closed. User returned to EDMS.  Create document Succeeded page is shown with links to set Properties and Permissions. |  |  |  |  |
|  |  |  | Click the Set Properties Link. | The Properties page displays. The required attributes are marked in Red. All custom attributes for the type are displayed. |  |  |  |  |
|  |  |  | Fill in attributes as follows:  Object Name: Draft Test Clinical Protocol.  Title: Clinical Protocal for 4.3 RightSite Validation.  Functional Origin: Clinical  Doc Date: '15-3-1999'  Protocol Number: E1687  Product Number: WAY-100579  Project Id: 0612G1  Security Class: Internal Use.  Site: Cherry Hill, NJ  Click Save Changes. | Message displayed ‘you have entered invalid attributes. Doc Date is starred. |  |  |  |  |
|  |  |  | Click save Changes again. | All values filled in are still there. |  |  |  |  |
|  |  |  | Enter Doc Date of ‘15-Mar-1999’.  Click Save Changes. | Property successfully changed msg appears.  Then the Create Documents screen is shown again. |  |  |  |  |
|  |  |  | Click Done | Folder actions is shown. |  |  |  |  |
|  |  | IMPORT |  |  |  |  |  |  |
|  |  |  | Click the ‘Import a Document’ link under ‘Importing’ heading. | The ‘Import’ screen appears. |  |  |  |  |
|  |  |  | Click ‘Browse’. | A ‘Choose file’ dialog box is displayed. |  |  |  |  |
|  |  |  | Find and select a PDF document. Click ‘Open’. | The dialog box closes. The name is shown in Import file field. |  |  |  |  |
|  |  |  | Add the word ‘draft’ in front of the name.  Select type as ‘Preclinical report’ | Box is populated. |  |  |  |  |
|  |  |  | Click ‘Continue Import’. | An Import screen is shown. |  |  |  |  |
|  |  |  | Check Create full text index checkbox.  Click ‘Finish Import’ button. | Screen ‘Post Import Options is shown with the message ‘Successfully imported ‘document’ is displayed. Two links are shown. |  |  |  |  |
|  |  |  | Click on the Set Properties Link | The Properties page appears. |  |  |  |  |
|  |  |  | Select the Choose from button next to Product Number. | A list of product numbers appear. |  |  |  |  |
|  |  |  | Enter WAY-167782  WAY-16764456 in the box at the bottom. Click Done. | The pop-up box closes. The properties field for Product number is filled with WAY-167644. |  |  |  |  |
|  |  |  | Enter other attributes as follows:  Title:  Doc Date:  Site:  Functional Origin:  Division:  GLP Data:  Security Class:  Abstract Only:  Click save changes | Message appears – you have entered invalid attribute values and the Product number box is starred. |  |  |  |  |
|  |  |  | Select the product number box, click Choose and select ‘WAX-121165’. Click Done | The box is populated. |  |  |  |  |
|  |  |  | Click Save changes. | The property change succeeded page is displayed. Returned to the Import succeeded page. |  |  |  |  |
|  |  |  | Click ‘Done’. | User is returned to the actions page. |  |  |  |  |
|  |  |  | Click Contents. | Contents is shown. |  |  |  |  |
|  |  |  | Navigate to and select the document. | The document is opened in Acrobat Reader. Verify the document is the same as the one imported. |  |  |  |  |
|  |  |  | Close Acrobat Reader by clicking on [X]. | Reader closes; user returned to EDMS. |  |  |  |  |
|  | View Permissions |  | Navigate to Draft: Information Management/RightSite 4.3 Testing folder and open | Contents are displayed. Next to all documents Edit links are present. |  |  |  |  |
|  |  |  | Click Actions. | The actions screen is present. The following links are show:  View, Checkout, Move, Link, Create PDF, Export, Route, Properties, Permissions, Apply lifecycle. |  |  |  |  |
|  | Viewing and Setting Properties |  |  |  |  |  |  |  |
|  | Set attributes for all types. |  | Navigate to the Validation Cabinet. | The cabinet opens. Three folders are there. |  |  |  |  |
|  |  | Representative DocumentTypes – Collection 1 | Click on the folder. | The folder opens. There are documents for each object type present. |  |  |  |  |
|  |  | Analytical Method | Navigate to the Document. Choose the Properties link. |  |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Ancillary Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Batch Masters | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Clinical Analysis Plan | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Clinical Data Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Clinical Lab Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Clinical Protocol | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Clinical Ops Standard  Clinical Study File Doc | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Clinical Study Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Cmc Protocol | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Cmc Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Contract | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Cpd Structure | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Customer Response Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Doclog Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Doclog Pal | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Dsm Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Engineering Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Exploratory Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Good Engineering Practices | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Grits Doc Volume | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Grits Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Grits Folder | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Icpd | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Investigator Brochure | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Labeling Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Lederle Miracl Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Master Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Memo | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Minutes | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Note | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Pal Change Control | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Patient Documents | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Periodic Safety Update Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Pharmacology Protocol | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Pm Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Ppp | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Preclinical Protocol | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Preclinical Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Protocol | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Pub Toc Entry | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Reference | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Regulatory Cmc Information | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Regulatory Communication | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Regulatory Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Regulatory Reference | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Regulatory Submission | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Reports | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Sdm Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Sensory Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Specification | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Sub Document | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Tabular Formats | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Trip Report | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  | Xda Collection | Navigate to the Document. Choose the Properties link. | The properties page is displayed. |  |  |  |  |
|  |  |  | Fill in all attributes. Click Save changes. | The Property Change succeeded page displays. Then returned to folder contents. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | Editing a Document in the docbase | Draft: Information Management/ RightSite 4.3 Testing | Click on Rightsite folder | Folder contents are displayed. |  |  |  |  |
|  |  |  | Navigate to Test Minutes document select the edit link next to the name. | Screen shows up ‘Applet loading, then document is opened in Word. |  |  |  |  |
|  |  |  | Edit the document by typing ‘Now editing this document’ at the end of the document. | Text appears at the end. |  |  |  |  |
|  |  |  | Select File->Save. | The document is saved. |  |  |  |  |
|  |  |  | Select file->Exit. | Word is closed; user is returned to workspace. |  |  |  |  |
|  |  |  | In EDMS, click Check In next to the document name. | Msgbox may appear, Do you want to upload the document from …’ unless checked not to show. |  |  |  |  |
|  |  |  | Click ‘Upload’ | The file is uploaded. The check in screen appears. |  |  |  |  |
|  |  |  | Select version 1.0 same version; enter ‘updated format’ in comments; choose version label as ‘draft’; click ‘Check-in’ | A Check In screen appears. |  |  |  |  |
|  |  |  | Click finish check in. | Check-In succeeded screen appears with three links. |  |  |  |  |
|  |  |  | Click the Set Properties Link | The Properties page displays. |  |  |  |  |
|  |  |  | Set properties. Click ‘save changes. | Screen appears – Property Change Succeeded. Then returned to the check in Succeeded page. |  |  |  |  |
|  |  |  | Click done. | Returned to folder contents. |  |  |  |  |
|  |  | Checkout & Cancel checkout |  |  |  |  |  |  |
|  |  |  | Navigate to the Test Word document and click Properties. | The Properties page displays. Record the modified date. |  |  |  |  |
|  |  |  | Click the Back button on the browser. | The folder contents display. |  |  |  |  |
|  |  |  | Next to the Test Word Doc, click the Actions link. | The Actions page appears. |  |  |  |  |
|  |  |  | Under Editing, select Check this document out for editing and click. | Msg appears: checking this document out for editing, applet loadin g. Then word appears with the document open in it. |  |  |  |  |
|  |  |  | Navigate to the end of the document; enter ‘this information should never be seen again.  Click the Save button. | The document is saved. |  |  |  |  |
|  |  |  | Select File->Exit. | Word is closed. User is returned to workspace.  Actions page shows, verify there is no way to edit a checked out document. |  |  |  |  |
|  |  |  | Select the Cancel the checkout of this document link. | The confirm Cancel checkout screen is shown with two button to Cancel Checkout or ‘Do not Cancel checkout (leave document Checked out). |  |  |  |  |
|  |  |  | Click the Cancel Checkout button. | The Cancel checkout succeeded message appears and then the Actions page is displayed. |  |  |  |  |
|  | Verify no changes made on cancel checkout. |  | Under Get information, click on the Display or set properties link. | The Properties page is displayed. Record the modified Date. It should match the earlier recorded. |  |  |  |  |
|  |  |  | Click the back button on the browser. | The Actions screen is displayed. |  |  |  |  |
|  |  |  | Click the View this document link. | The document opens. Ensure that the test just entered is not seen in the document. |  |  |  |  |
|  |  |  | Under Editing, click the Link this document Link. | The Link document screen appears. |  |  |  |  |
|  |  |  | Navigate to your home cabinet. Click Link. | Link Succeeded message appears. Then Actions screen is displayed. |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  | Export a document w/extension |  | Navigate to the document ‘draft: Information Management/ RightSite 4.3 Testing/folder org.pdf’. |  |  |  |  |  |
|  |  |  | Click the Actions link for the document. | The Actions page appears. |  |  |  |  |
|  |  |  | Click the Export this Document link in the Exporting options. | The Export Document As dialog box appears. |  |  |  |  |
|  |  | C:\temp | Choose a location from the Save In pull-down menu. | The exported name defaults to ‘folderorg.pdf’. |  |  |  |  |
|  |  | C:\temp\folderorg.pdf | Click Save. | The document is exported to the correct location with the correct name. |  |  |  |  |
|  |  |  | Click the Disconnect icon on the toolbar. | The Confirm Log Out page appears |  |  |  |  |
|  |  |  | Click Log Out. | Log out Successfully completed window appears and then the docbases window appears. |  |  |  |  |

#### Coordinators Script

Issuing document – navigate, change acls, check properties set, move document to issued, render PDF; Check out in issued, modify, try to check in as same version, error, check in as higher version; try to checkout previous version in issued cabinet; Export from issued & reimport to draft, modify in draft, Move to Issued and render. Delete process.; create link in home cabinet- try to delete it; no delete access to folder & cabinet; copy sdm document; no access to non-sdm document; copy of folders; move a folder;

| **ID** | **Type /Purpose** | **Input** | **Procedure** | **Expected results** | **Actual Results** | | | **Initials & Date/Time** | **Attachment Ref.** | **Pass/ Fail** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Logging In |  | Open Internet Explorer Window | IE Window Opens |  | | |  |  |  |
|  |  |  | Go to web address  http://sdwaprsite02/rs-bin/RightSite.dll/ssi4  Click the Docbases icon on the toolbar. | The docbases window appears. |  | | |  |  |  |
|  |  |  | Click the name of the Docbase to which you want to connect: tedms4i | The Log In page appears. |  | | |  |  |  |
|  |  | Train12 | Type your user name. |  |  | | |  |  |  |
|  | Correct login | Train12 | Type your password. |  |  | | |  |  |  |
|  |  |  | Click Log In. | The docbase window appears. |  | | |  |  |  |
|  | Navigate | Draft: Information Management/RightSite 4.3 Testing folder | Select +/- to get to the correct folder | The Folder opens |  | | |  |  |  |
|  | Move to issued |  |  |  |  | | |  |  |  |
|  |  | Draft Move to Final.doc | Select document ‘Draft Move to Final.doc’; choose actions link. | The actions page appears. |  | | |  |  |  |
|  | Checkout |  | Click the check out link. | The document opens in word. |  | | |  |  |  |
|  |  |  | Close the document. Select File-> exit. | Word closes. User is returned to actions page. |  | | |  |  |  |
|  |  |  | Click the check-in link. | The Upload document dialog box appears. |  | | |  |  |  |
|  |  |  | Click Upload. | The check-in page appears. |  | | |  |  |  |
|  |  |  | Change the version to the next major version.  Change the label to remove ‘draft’ to ‘Final’. Enter Final in the Version description. Click ‘check-in’. | The next check-in page appears. |  | | |  |  |  |
|  |  |  | Click finish check-in. | The document check-in succeeded page appears. With 3 links available. |  | | |  |  |  |
|  | Ensure properties set |  | Select the Set Properties link. | The properties page appears. |  | | |  |  |  |
|  |  |  | Change the name by replacing ‘draft’ with ‘Final’. |  |  | | |  |  |  |
|  |  |  | Ensure all required properties. Click Save Changes. | The Properties Change Succeeded message appears. Returned to the check in succeeded page. |  | | |  |  |  |
|  |  |  | Click Done. | The actions page appears. |  | | |  |  |  |
|  | Move to issued | Draft Move to Final.doc | Click the move this document link. | The Move Document page appears. |  | | |  |  |  |
|  |  |  | Choose the Information Management cabinet.  Then the RightSite 4.3 Testing folder.  Click move. | The document is moved. The move succeeded page is displayed. The folder contents page appears and the document is not there. |  | | |  |  |  |
|  | Navigate to moved document |  | Navigate to the Information Management cabinet.  Then the RightSite 4.3 Testing folder. | The document is now there. |  | | |  |  |  |
|  |  |  | Select the Actions link. | The Actions page appears. |  | | |  |  |  |
|  | Change acls |  |  |  |  | | |  |  |  |
|  |  | Draft Move to Final.doc | Select Permissions at the top of the page. | The Permissions page appears. |  | | |  |  |  |
|  |  |  | Click the Choose a system permission set. | The change ACL screen appears. |  | | |  |  |  |
|  |  |  | Select the ‘xxx’ ACL. Click ‘save changes’? | The actions page appears. |  | | |  |  |  |
|  |  |  | Under Publishing, Select ‘Create PDF Rendition’ | A confirmation screen is displayed. |  | | |  |  |  |
|  |  |  | Click ‘Continue’ | A message is displayed that the request was successfully submitted. The actions page displays. |  | | |  |  |  |
|  |  |  | Select the Check this document out for Editing link. | The document is opened in word. The document is checked out. |  | | |  |  |  |
|  |  |  | Type the letters ‘ modified in final’. Save the document. | The document is saved. |  | | |  |  |  |
|  |  |  | Select file-> exit. | Word is closed. Returned to EDMS. |  | | |  |  |  |
|  |  |  | Click the Check In link for the selected document. | The Check In page appears. |  | | |  |  |  |
|  |  |  | Try to select the same version number. | It is disabled. |  | | |  |  |  |
|  |  |  | Select the next higher minor version. | It is selected. |  | | |  |  |  |
|  |  |  | Click Check In. | A dialog box appears requesting version description to be filled in. |  | | |  |  |  |
|  |  |  | Type ‘This is a modified Final version’ in the Version Description box. |  |  | | |  |  |  |
|  |  |  | Click Check In. | The Check In page appears. |  | | |  |  |  |
|  |  |  | Click Finish Check In. | The Check In Succeeded page appears. |  | | |  |  |  |
|  |  |  | Click Done. | The actions screen appears. |  | | |  |  |  |
|  |  |  | Select the ‘Versions and Renditions’ link at the top of the page. | The Versions & Renditions screen appears. There are two Final versions and one draft version. And a PDF and a PDF text rendition. |  | | |  |  |  |
|  |  |  | Next to the link for the first Final version (2.0), Click the Edit link. | Unable to Check Out screen appears. The document is not checked out. |  | | |  |  |  |
|  |  |  | Click the Done button. | The Versions & Renditions page appears. |  | | |  |  |  |
|  |  |  | Click on the Acrobat PDF link. | The document appears in Acrobat Reader. Verify that the document is the same as the Word document. |  | | |  |  |  |
|  |  |  | Select file-> exit. | Acrobat reader is closed. The Versions & Renditions page appears. |  | | |  |  |  |
|  | Export |  | Select the Actions link next to the latest version of the document. | The Actions page appears. |  | | |  |  |  |
|  |  |  | Click the Export this document link. | The Export dialog box appears. |  | | |  |  |  |
|  |  |  | Set the location to the c:\temp drive. Click save. | The document is exported. User returned to the actions page. |  | | |  |  |  |
|  | Reimport to Final |  |  |  |  | | |  |  |  |
|  |  |  | Select the draft: Information Management/test folder. Click Actions. | Folder Actions page appears. |  | | |  |  |  |
|  |  |  | Click Import a Document. | Import Screen appears |  | | |  |  |  |
|  |  |  | Click Browse | A choose file dialog box appears. |  | | |  |  |  |
|  |  |  | Navigate to and select the file just exported. Double click on it. | The Choose file box is populated with that filename. Object Name is populated as is format. |  | | |  |  |  |
|  |  |  | Add the word ‘Final’ in front of the name, if not there. Select type as ‘Investigator Brochure’. Click Continue Import. | Next Import Screen is shown. |  | | |  |  |  |
|  |  |  | Click Finish Import. | Post Import Options screen is displayed. |  | | |  |  |  |
|  |  |  | Click Done. | User returned to Actions screen. |  | | |  |  |  |
|  |  |  | Click Contents at top. | Folder contents is shown. Verify file is there. |  | | |  |  |  |
|  | Delete |  |  |  |  | | |  |  |  |
|  |  |  | Try to delete the document. | No way to delete the document. No right click access to cut. No actions for delete. |  | | |  |  |  |
|  |  |  | Try to delete the folder. | No way to delete the folder.  No right click access to cut. No actions for delete. |  | | |  |  |  |
|  |  |  | Try to delete the cabinet. | No way to delete the cabinet.  No right click access to cut. No actions for delete. |  | | |  |  |  |
|  | Move folder | thedraft: Information Management/Test Folder | Navigate to folder; click the actions link. | The Actions page appears. |  | | |  |  |  |
|  |  |  | Click Move this folder link. | The Move Folder screen appears. |  | | |  |  |  |
|  |  |  | Select the Information Management cabinet. Click Move. | The Move Succeeded message appears. The cabinet contents appear, the folder is not there. |  | | |  |  |  |
|  |  |  | Navigate to the Information Management cabinet. | The folder is present. |  | | |  |  |  |
|  |  |  | Click the Disconnect icon on the toolbar. | The Confirm Log Out page appears |  |  |  | | | | |  |
|  |  |  | Click Log Out. | Log out Successfully completed window appears and then the docbases window appears. |  |  |  | | | | |  |

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| --- | --- |
| **Test Object** | (The name of the component or function being exercised in the procedure) |
| **Version** |  |

|  |  |
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| **Test Goal #n** | (The name of the component or function being exercised in the procedure) |
| **Description** |  |

|  |  |
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| **Test Case #n** |  |
| **Description** |  |

| **Step #** | **Test Prerequisites/Data** | **Test Execution Instructions** | **Expected results** | **Actual Results** | **Pass/ Fail** |
| --- | --- | --- | --- | --- | --- |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
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| --- | --- | --- | --- |
| **Test Conclusion** | | | |
| Pass All test/verifications were successfully completed | | | |
| Fail Some test/verifications were not successfully completed | | | |
| Test Incident Report Form No.: | | | |
| **Recorded By** | **Date** | **Verified By** | **Date** |
|  |  |  |  |

|  |
| --- |
| **Comments** |
|  |

| **Requirement/ Use Case** | **Test Case #** | **Description** | **Result**  **(P/F)** | **Reviewer** | **Date** |
| --- | --- | --- | --- | --- | --- |
| Enter the **Requirement #(s)** from the protocol. | Enter the **Test Case #n** from the Validation Protocol. | Enter the test case **Description** from the Validation Protocol. | Enter "P" if the test case passed or "F" if the test case failed. | Enter the name of the person who determined whether or not the test case passed or failed. | Enter the date the test case passed or failed. |
| 1,2 | 1 | Add new Pharmacy. | P | Stewart Browningham | 1/1/2001 |
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### IC-RS43-AR5-IE55

Include viewing of all different types of PDFs – get list from someone inside of acrobat reader 5.0.