Opening a New Case for a New Customer

SYSTEM: Ombudsman Case Tracking System 2.0
SCRIPT NAME: User Acceptance Test (UAT) Script
TEST 1: **Opening a New Case Using the OCTS 2.0 Screens**

Scope:

The OCTS 2.0 application provides the SFA Ombudsman the ability to record information gained during contacts with customers, partners and third parties for the purpose of resolving requests for assistance from customers. This test case validates the tasks associated with opening a new case using the OCTS 2.0 screens as a result of contact activity. The following contact scenarios will be executed:

- Open a new case for a new customer
- Open a new case for a new customer based on information from a third party
- Open a new case when the customer gives incomplete information
- Log a case for a general assistance call
- Open a new case for a new customer based on correspondence
- Open a new case for a new customer (repeated to test the rest of the assignment rules)

The information captured during interactions with contacts and subsequently entered into OCTS 2.0 will be determined by the type of scenario encountered. For example, if this is the first contact with a customer or third party, contact information must be collected, the data necessary to create a new account will be collected.

Testing for this OCTS scenario will involve staging two types of contact:

- Customer Contact
- Third Party Contact

These contacts will be associated with an appropriate account. A case will be generated for the customer account.

The result of this scenario's successful completion will be a creation of Contact Record, Account Record, and Case Record.

Exclusions/
Limitations:

- UAT does not have the capability of performing a stress test on the OCTS 2.0 program. The number of transactions staged for UAT conditions will represent only a small fraction of the production-size data.

Control:

<u>Testing Site:</u> Testing will take place at the ROB-3 site. The On-site Test Lead will:

- facilitate the test execution
- collect change requests from the Users executing the test
- enter the change control requests in to the MS Access System Investigation Request Tool
- assign a priority level to each request
- coordinate modifications with the development team
- coordinate regression testing with the User Test Team

Conditions:

- Open a new case for a new customer
- Open a new case for a new customer based on information from a third party
- Open a new case when the customer gives incomplete information
- Log a case for a general assistance call
- Open a new case for a new customer based on correspondence
- Open a new case for a new customer (repeated to test the rest of the assignment rules)

Operations:

Input data will be staged using a Microsoft Excel Tool. After logging on to the Siebel test region, the tester will manually enter the staged data utilizing the following methods:

- The tester will navigate through the OCTS 2.0 screens in order to enter the data in the appropriate areas.

Results:

The test team will review results on-line.

Inputs:

The following excel files contain the test data:

new case data [].xls

where [] = 0,1,2,…10

Outputs:

The output will be stored in the Test Database.

Opening a New Case for a New Customer

Procedures/Script:

Scenario 1: New Customer

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view, a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to "Open," the Sub-Status field defaults to "Unassigned," the Date Received field defaults to the date and time set on your computer. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the "Original Issue Summary" information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	5	Hit tab in order to navigate to	The cursor is on the "Original	

Opening a New Case for a New Customer

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
		the next field.	Issue Category" field.	
	6	Select the "Original Issue Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value, the value appears in the "Original Issue Category" field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the "Original Issue Sub-Category" field.	
	8	Select the "Original Issue Sub-Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value, the value appears in the "Original Issue Sub-Category" field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Summary" field.	
	10	Enter the "Customer Expectation Summary" information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Category" field.	
	12	Select the "Customer Expectation Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the "Customer Expectation Category" field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Sub-Category" field.	

Opening a New Case for a New Customer

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	14	Select the “Customer Expectation Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the “Customer Expectation Sub-Category” field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the “Referred By” field.	
	16	Select the “Referred By” category that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Referred By” field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the “Last Name” field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Select “Account” from the picklist in the **Find** field. Enter the SSN number for the test case under review.	The record does not exist in the database. As such, the Pick Contact Applet is blank	
	20	Click the New button at the bottom of the applet.	A blank record is opened.	
	21	Enter the “Contact Type” and the “Relationship / Title” for the contact record.	The selected values are displayed in the appropriate fields.	
	22	Click on the Account field. Hit F2 to bring up the Pick Account box. Click the New button.	The Pick Account box is displayed. A blank Account record is opened.	

Opening a New Case for a New Customer

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	23	Enter values for the following fields (if values for each field exist): Account, Account Type, First Name, Last Name, Suffix, Middle Initial, Prefix, Preferred Name, Date of Birth, Address, City, State, Zip, Country, Contact Method, Home Phone #, Work Phone #, Fax #, Country Code, Mobile Phone #, 1st Email / Homepage, 2nd Email, Hours Available, Hours Available Time Zone, Comments, and Reminders.	The values are stored in the appropriate fields.	
	24	Verify the record you just created is highlighted.	The record has a red arrow to the left.	
	25	Click the Pick button at the bottom of the Pick Account box.	The Pick Account box closes and the information is copied to the Contact record.	
	26	Click on the Pick button at the bottom of the Pick Contact applet.	The Last Name, First Name, Home Number and Account fields are populated.	
	27	Hit tab in order to navigate to the next field.	The cursor is in the "Svc Agency" field	
	28	Select the primary "Svc Agency" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Svc Agency" field	
	29	Hit tab in order to navigate to the next field.	The cursor is in the "Loan Type" field	
	30	Select the primary "Loan Type" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Loan Type" field	

Opening a New Case for a New Customer

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	31	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Status” field.	
	32	Select the primary “Loan Status” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Status” field	
	33	On the List Applet at the top of the screen, click the hyperlink in the Account field pertaining to the record you just created.	This takes you to the Account Tab, Case View.	
	34	Verify that the data entered in the All Cases view is reflected in the account record.	All Account data elements are visible.	
	35	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	
	36	On the List Applet at the top of the screen, click the hyperlink in the Last Name field pertaining to the record you just created.	This takes you to the Contact Tab, Case View.	
	37	Verify that the data entered in the All Cases view is reflected in the contact record.	All Contact data elements are visible.	
	38	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	
	39	Verify that the “Ombudsman” field has a value. If the field is blank, wait a few minutes, go to another view, then come back to this view and check the value.	The case has been automatically assigned to one of the following people: Valencia Ahmad, Ann Curry, Lula Lewis, Lou Polowniak, Veardean Wilson	

Opening a New Case for a New Customer Based on Third Party Information

Procedures/Script:

Scenario 2: Third Party

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view “All Cases” is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view, a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to “Open,” the Sub-Status field defaults to “Unassigned,” the Date Received field defaults to the system’s date and time. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the “Original Issue Summary” information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	

Opening a New Case for a New Customer Based on Third Party Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	5	Hit tab in order to navigate to the next field.	The cursor is on the “Original Issue Category” field.	
	6	Select the “Original Issue Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value the value appears in the “Original Issue Category” field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the “Original Issue Sub-Category” field.	
	8	Select the “Original Issue Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value the value appears in the “Original Issue Sub-Category” field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Summary” field.	
	10	Enter the “Customer Expectation Summary” information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Category” field.	
	12	Select the “Customer Expectation Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the “Customer Expectation Category” field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Sub-Category” field.	

Opening a New Case for a New Customer Based on Third Party Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	14	Select the “Customer Expectation Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the “Customer Expectation Sub-Category” field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the “Referred By” field.	
	16	Select the “Referred By Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Referred By Category” field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the “Last Name” field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Select “Account” from the picklist in the **Find** field. And enter the SSN number for the test case under review.	The record does not exist in the database. As such, the Pick Contact Applet is blank	
	20	Click the New button at the bottom of the applet.	A blank record is opened.	
	21	Enter the “Contact Type” and the “Relationship / Title” for the contact record.	The selected values are displayed in the appropriate fields.	
	22	Click on the Account field. Hit F2 to bring up the Pick Account box. Click the New button.	The Pick Account box is displayed. A blank Account record is opened.	

Opening a New Case for a New Customer Based on Third Party Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	23	Enter values for the following fields (if values for each field exist): Account, Account Type, First Name, Last Name, Suffix, Middle Initial, Prefix, Preferred Name, Date of Birth, Address, City, State, Zip, Country, Contact Method, Home Phone #, Work Phone #, Fax #, Country Code, Mobile Phone #, 1st Email / Homepage, 2nd Email, Hours Available, Hours Available Time Zone, Comments, and Reminders.	The values are stored in the appropriate fields.	
	24	Verify the record you just created is highlighted.	The record has a red arrow to the left.	
	25	Click the Pick button at the bottom of the Pick Account box.	The Pick Account box closes and the information is copied to the Contact record.	
	26	Verify that the customer contact record is selected.	The record has a red arrow to the left.	
	27	Click the Copy Record icon on the tool bar.	A copy of the contact record is created.	
	28	Change “Contact Type” to “Third Party.” Change “Relationship / Title” to the appropriate value. Enter any other information about the Third Party that differs from the customer’s information.	The values for the Third Party are stored in the appropriate fields.	
	29	Verify that the Third Party record is selected.	The record has a red arrow to the left.	
	30	Click on the Pick button at the bottom of the Pick Contact box.	The Last Name, First Name, Home Number and Account fields are populated.	
	31	Hit tab in order to navigate to the next field.	The cursor is in the “Svc Agency” field.	

Opening a New Case for a New Customer Based on Third Party Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	32	Select the primary “Svc Agency” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Svc Agency” field.	
	33	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Type” field.	
	34	Select the primary “Loan Type” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Type” field.	
	35	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Status” field.	
	36	Select the primary “Loan Status” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value, the value appears in the “Loan Status” field.	
	37	On the List Applet at the top of the screen, click the hyperlink in the Last Name field pertaining to the record you just created.	This takes you to the Contact Tab, Case View.	
	38	Verify that the data entered in the All Cases view is reflected in the contact record.	All Contact data elements are visible.	
	39	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	

Opening a New Case for a New Customer Based on Third Party Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	40	Verify that the "Ombudsman" field has a value. If the field is blank, wait a few minutes, go to another view, then come back to this view and check the value.	The case has been automatically assigned to Joyce DeMoss.	

Opening a New Case for a New Customer – Customer Gives Incomplete Information

Procedures/Script:

Scenario 3: Customer Gives Incomplete Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view, a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to "Open," the Sub-Status field defaults to "Unassigned," the Date Received field defaults to the system's date and time. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the "Original Issue Summary" information	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	5	Hit tab in order to navigate to the next field.	The cursor is on the "Original Issue Category" field.	

Opening a New Case for a New Customer – Customer Gives Incomplete Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	6	Select the “Original Issue Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value the value appears in the “Original Issue Category” field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the “Original Issue Sub-Category” field.	
	8	Select the “Original Issue Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value the value appears in the “Original Issue Sub-Category” field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Summary” field.	
	10	Enter the “Customer Expectation Summary” information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Category” field.	
	12	Select the “Customer Expectation Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the “Customer Expectation Category” field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Sub-Category” field.	

Opening a New Case for a New Customer – Customer Gives Incomplete Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECETD RESULT
	14	Select the "Customer Expectation Sub-Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the "Customer Expectation Sub-Category" field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the "Referred By" field.	
	16	Select the "Referred By Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value, the value appears in the "Referred By Category" field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the "Last Name" field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Since this example uses a customer who will not give you a SSN, you do not need to search on the account.	Proceed to step 20.	
	20	Click the New button at the bottom of the applet.	A blank record is opened.	
	21	Enter the "Contact Type" and the "Relationship / Title" for the contact record.	The selected values are displayed in the appropriate fields.	
	22	Click on the Account field. Hit F2 to bring up the Pick Account box. Click the New button.	The Pick Account box is displayed. A blank Account record is opened.	

Opening a New Case for a New Customer – Customer Gives Incomplete Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	23	Enter values for the following fields (if values for each field exist): Account, Account Type, First Name, Last Name, Suffix, Middle Initial, Prefix, Preferred Name, Date of Birth, Address, City, State, Zip, Country, Contact Method, Home Phone #, Work Phone #, Fax #, Country Code, Mobile Phone #, 1st Email / Homepage, 2nd Email, Hours Available, Hours Available Time Zone, Comments, and Reminders. NOTE: For "State" and "Country" fields, leave blank if no values are given. For "Site," use the Case #. For all other fields, use "Not Given."	The values are stored in the appropriate fields.	
	24	Verify the record you just created is highlighted.	The record has a red arrow to the left.	
	25	Click the Pick button at the bottom of the Pick Account box.	The Pick Account box closes and the information is copied to the Contact record.	
	26	Click on the Pick button at the bottom of the Pick Contact applet.	The Last Name, First Name, Home Number and Account fields are populated.	
	27	Hit tab in order to navigate to the next field.	The cursor is in the "Svc Agency" field.	
	28	Select the primary "Svc Agency" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Svc Agency" field.	
	29	Hit tab in order to navigate to the next field.	The cursor is in the "Loan Type" field.	

Opening a New Case for a New Customer – Customer Gives Incomplete Information

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	30	Select the primary "Loan Type" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Loan Type" field.	
	31	Hit tab in order to navigate to the next field.	The cursor is in the "Loan Status" field.	
	32	Select the primary "Loan Status" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Loan Status" field.	
	37	On the List Applet at the top of the screen, click the hyperlink in the Last Name field pertaining to the record you just created.	This takes you to the Contact Tab, Case View.	
	38	Verify that the data entered in the All Cases view is reflected in the contact record.	All Contact data elements are visible.	
	39	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	
	40	Verify that the "Ombudsman" field has a value. If the field is blank, wait a few minutes, go to another view, then come back to this view and check the value.	The case has been automatically assigned to Chris Joy.	

Opening a New Case – General Assistance Call

Procedures/Script:

Scenario 4: General Assistance Call

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view “All Cases” is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view, a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to “Open,” the Sub-Status field defaults to “Unassigned,” the Date Received field defaults to the system’s date and time. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the “Original Issue Summary” information	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	

Opening a New Case – General Assistance Call

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	5	Hit tab in order to navigate to the next field.	The cursor is on the "Original Issue Category" field.	
	6	Select the "Original Issue Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value the value appears in the "Original Issue Category" field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the "Original Issue Sub-Category" field.	
	8	Select the "Original Issue Sub-Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value the value appears in the "Original Issue Sub-Category" field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Summary" field.	
	10	Enter the "Customer Expectation Summary" information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Category" field.	
	12	Select the "Customer Expectation Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the "Customer Expectation Category" field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Sub-Category" field.	

Opening a New Case – General Assistance Call

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	14	Select the “Customer Expectation Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the “Customer Expectation Sub-Category” field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the “Referred By” field.	
	16	Select the “Referred By Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Referred By Category” field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the “Last Name” field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Select “Account” in the Find field.	The selected value is displayed in the appropriate field.	
	20	Enter “000*” in the starting with field. Hit Enter.	The Last Name, First Name, Home Number and Account fields are populated with the John Q. Public information.	
	21	Hit tab in order to navigate to the next field.	The cursor is in the “Svc Agency” field.	
	22	Select the primary “Svc Agency” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Svc Agency” field.	
	23	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Type” field.	

Opening a New Case – General Assistance Call

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	24	Select the primary “Loan Type” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Type” field.	
	25	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Status” field.	
	26	Select the primary “Loan Status” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Status” field.	
	27	Click in the “Ombudsman” field.	The cursor is in the appropriate field.	
	28	Click on the drop down arrow.	The Pick Case Owner box appears.	
	29	Type “GEN*” for General Assistance in the “starting with” field. Hit Enter.	The Pick Case Owner box is closed. The “Ombudsman” field is populated with “GENASSIST.”	
	30	Click on the “Results Search” Tab.	The results Search view opens. The record displayed is the John Q. Public record you are working with.	
	31	Click the New button on the form applet at the bottom of the screen.	The Results box appears listing all available results.	
	32	Select the appropriate result and click Pick.	The chosen result is added to the case.	
	33	Click the Toggle button in the upper half of the view.	A list applet appears. Your record is the top record.	
	34	Click the Toggle button in the upper half of the view.	The form applet is displayed again.	
	35	Change the “Status” field to “Closed” in the Case Status & Ownership box at the top of the screen.	The value “Closed” is recorded in the “Status” field. The “Sub-Status” field value is changed to “Resolved.” Date Closed is automatically	

Opening a New Case – General Assistance Call

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
			populated with the system's date and time.	

Opening a New Case for a New Customer Via Correspondence

Procedures/Script:

Scenario 5: Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to "Open," the Sub-Status field defaults to "Unassigned," the Date Received field defaults to the system's date and time. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the "Original Issue Summary" information	The information is stored in this field. If the user clicks on the ellipsis button [...] the entry window expands. The user can enlarge this window to view the entire entry.	

Opening a New Case for a New Customer Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	5	Hit tab in order to navigate to the next field.	The cursor is on the “Original Issue Category” field.	
	6	Select the “Original Issue Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value the value appears in the “Original Issue Category” field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the “Original Issue Sub-Category” field.	
	8	Select the “Original Issue Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value the value appears in the “Original Issue Sub-Category” field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Summary” field.	
	10	Enter the “Customer Expectation Summary” information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Category” field.	
	12	Select the “Customer Expectation Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the “Customer Expectation Category” field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Sub-Category” field.	

Opening a New Case for a New Customer Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	14	Select the “Customer Expectation Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the “Customer Expectation Sub-Category” field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the “Referred By” field.	
	16	Select the “Referred By Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Referred By Category” field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the “Last Name” field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Select “Account” from the picklist in the **Find** field. And enter the SSN number for the test case under review.	The record does not exist in the database. As such, the Pick Contact Applet is blank.	
	20	Click the New button at the bottom of the applet.	A blank record is opened.	
	21	Enter the “Contact Type” and the “Relationship / Title” for the contact record.	The selected values are displayed in the appropriate fields.	
	22	Click on the Account field. Hit F2 to bring up the Pick Account box. Click the New button.	The Pick Account box is displayed. A blank Account record is opened.	

Opening a New Case for a New Customer Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	23	Enter values for the following fields (if values for each field exist): Account, Account Type, First Name, Last Name, Suffix, Middle Initial, Prefix, Preferred Name, Date of Birth, Address, City, State, Zip, Country, Contact Method, Home Phone #, Work Phone #, Fax #, Country Code, Mobile Phone #, 1st Email / Homepage, 2nd Email, Hours Available, Hours Available Time Zone, Comments, and Reminders.	The values are stored in the appropriate fields.	
	24	Verify the record you just created is highlighted.	The record has a red arrow to the left.	
	25	Click the Pick button at the bottom of the Pick Account box.	The Pick Account box closes and the information is copied to the Contact record.	
	26	Click on the Pick button at the bottom of the Pick Contact applet.	The Last Name, First Name, Home Number and Account fields are populated.	
	27	Hit tab in order to navigate to the next field.	The cursor is in the "Svc Agency" field.	
	28	Select the primary "Svc Agency" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Svc Agency" field.	
	29	Hit tab in order to navigate to the next field.	The cursor is in the "Loan Type" field.	
	30	Select the primary "Loan Type" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Loan Type" field.	

Opening a New Case for a New Customer Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	31	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Status” field.	
	32	Select the primary “Loan Status” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Status” field.	
	33	Verify that the record you just created is highlighted.	The left-most column will have a ‘>’ symbol.	
	34	Click on “Activities” on the view bar.	The view “Activities” is visible. In the top half of the view is a Case form applet populated with data from your case. The bottom half of the view contains an Activity list applet with a toggle to the Activity form applet.	
	35	Click on the toggle button to get to the Activity form applet.	The Activity form applet is visible in the bottom half of the view.	
	36	Click the New button on the form applet at the bottom of the screen.	“Case #” is automatically populated, “Last Name” and “First Name” are populated with the primary contact linked to the case, “Account” is automatically populated, “Assigned To” is populated with your id, “Planned Start” is populated with the system’s date and time, “Actual Start” is populated with the system’s date and time, “Due” is populated with the system’s date. All other fields are blank. The cursor is on “Activity Type.”	

Opening a New Case for a New Customer Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	37	Select the “Activity Type” which in this case will be “Correspondence.” You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with the activity type appears. After selecting “Correspondence,” the value appears in the “Activity Type” field.	
	38	Hit tab in order to navigate to the next field.	The cursor is in the “Description” field.	
	39	Enter a description of the type of correspondence received from the customer.	The information is stored in the “Description” field. The user can use the arrows or scroll bar to scroll through the entire text.	
	40	Click on the “Priority” field.	The cursor is in the “Priority” field.	
	41	Select a “Priority” that will help you manage your work. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with the priority appears. After selecting a value, the value appears in the “Priority” field.	
	42	Hit tab in order to navigate to the next field.	The cursor is in the “Status” field	
	43	Select a “Status” that will help you manage your work. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with the status appears. After selecting a value, the value appears in the “Status” field.	
	44	Tab to the “Due” field.	The cursor is in the “Due” field.	
	45	Click on the arrow and change the date to 2 days ahead.	The new date is displayed.	
	46	Tab to the “Planned Start” field.	The cursor is in the “Planned Start” field.	

Opening a New Case for a New Customer Via Correspondence

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	47	Click on the arrow and change the date to one day back.	New date is displayed.	
	48	Tab to the “Actual Start” field.	The cursor is in the “Actual Start” field.	
	49	Click on the arrow and change the date to one day back.	New date is displayed.	
	50	Click on the “Comments” field.	The cursor is in the “Comments” field	
	51	Enter a more detailed description of the correspondence, if available.	The information is stored in the “Comments” field. The user can use the arrows or scroll bar to scroll through the entire text.	
	52	Click on the “Actual Completion” field.	The cursor is in the “Actual Completion” field.	
	53	Enter the correct date and time in the “Actual Completion” field.	The information is stored in the “Actual Completion” field and the “Status” field value is changed to “Done.” The “Duration” field will automatically populate with the calculated time it took to complete the activity.	
	54	Click on the Back Arrow in the History Bar.	This brings you back to the Case Tab, All Cases View.	
	55	Verify that the “Ombudsman” field has a value. If the field is blank, wait a few minutes, go to another view, then come back to this view and check the value.	The case has been automatically assigned to Lisa Howell.	

Opening a New Case for a New Customer – Assignment Manager

Procedures/Script:

Scenario 6: New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view, a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to "Open," the Sub-Status field defaults to "Unassigned," the Date Received field defaults to the date and time set on your computer. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the "Original Issue Summary" information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	5	Hit tab in order to navigate to the next field.	The cursor is on the "Original Issue Category" field.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	6	Select the “Original Issue Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value, the value appears in the “Original Issue Category” field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the “Original Issue Sub-Category” field.	
	8	Select the “Original Issue Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value, the value appears in the “Original Issue Sub-Category” field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Summary” field.	
	10	Enter the “Customer Expectation Summary” information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Category” field.	
	12	Select the “Customer Expectation Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the “Customer Expectation Category” field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the “Customer Expectation Sub-Category” field.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	14	Select the “Customer Expectation Sub-Category” that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the “Customer Expectation Sub-Category” field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the “Referred By” field.	
	16	Select the “Referred By” category that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Referred By” field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the “Last Name” field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Select “Account” from the picklist in the **Find** field. Enter the SSN number for the test case under review.	The record does not exist in the database. As such, the Pick Contact Applet is blank	
	20	Click the New button at the bottom of the applet.	A blank record is opened.	
	21	Enter the “Contact Type” and the “Relationship / Title” for the contact record.	The selected values are displayed in the appropriate fields.	
	22	Click on the Account field. Hit F2 to bring up the Pick Account box. Click the New button.	The Pick Account box is displayed. A blank Account record is opened.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	23	Enter values for the following fields (if values for each field exist): Account, Account Type, First Name, Last Name, Suffix, Middle Initial, Prefix, Preferred Name, Date of Birth, Address, City, State, Zip, Country, Contact Method, Home Phone #, Work Phone #, Fax #, Country Code, Mobile Phone #, 1st Email / Homepage, 2nd Email, Hours Available, Hours Available Time Zone, Comments, and Reminders.	The values are stored in the appropriate fields.	
	24	Verify the record you just created is highlighted.	The record has a red arrow to the left.	
	25	Click the Pick button at the bottom of the Pick Account box.	The Pick Account box closes and the information is copied to the Contact record.	
	26	Click on the Pick button at the bottom of the Pick Contact applet.	The Last Name, First Name, Home Number and Account fields are populated.	
	27	Hit tab in order to navigate to the next field.	The cursor is in the "Svc Agency" field	
	28	Select the primary "Svc Agency" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Svc Agency" field	
	29	Hit tab in order to navigate to the next field.	The cursor is in the "Loan Type" field	
	30	Select the primary "Loan Type" involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Loan Type" field	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	31	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Status” field.	
	32	Select the primary “Loan Status” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Status” field	
	33	On the List Applet at the top of the screen, click the hyperlink in the Account field pertaining to the record you just created.	This takes you to the Account Tab, Case View.	
	34	Verify that the data entered in the All Cases view is reflected in the account record.	All Account data elements are visible.	
	35	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	
	36	On the List Applet at the top of the screen, click the hyperlink in the Last Name field pertaining to the record you just created.	This takes you to the Contact Tab, Case View.	
	37	Verify that the data entered in the All Cases view is reflected in the contact record.	All Contact data elements are visible.	
	38	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	39	Verify that the "Ombudsman" field has a value. If the field is blank, wait a few minutes, go to another view, then come back to this view and check the value.	The case has been automatically assigned to one of the following people: Steven Black, Steve Currie, Annie Danley, Andrew Graham, Ray Green, Michael Jacobs, Mike Johnson, Jackie Jordache, Regina Kelly, Karen Parker, J. Sisilija, Melynda Smith, Brenda Wall, Brian Wright	

Opening a New Case for a New Customer – Assignment Manager

Procedures/Script:

Scenario 7: New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon	
	2	Navigate to the Cases Tab, All Cases View.	The view "All Cases" is visible. In the top half of the view a list applet detailing cases is visible. When first entering this view, the top record in this list applet is selected (has a > cursor on the left most column). In the bottom half of the view, a form applet detailing the information for the Case selected in the list applet is visible. The New, Copy, Cancel, and Assign buttons are enabled. The Delete button is not enabled.	
	3	Click the New button on the form applet at the bottom of the screen.	The Case number is automatically populated, the Intake Person field defaults to your user name, the Status field defaults to "Open," the Sub-Status field defaults to "Unassigned," the Date Received field defaults to the date and time set on your computer. All other fields are blank. The cursor is in the Original Issue Summary field.	
	4	Enter the "Original Issue Summary" information.	The information is stored in this field. If the user clicks on the ellipsis button [...] the entry window expands. The user can enlarge this window to view the entire entry.	
	5	Hit tab in order to navigate to the next field.	The cursor is on the "Original Issue Category" field.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	6	Select the "Original Issue Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer issues appears. After selecting a particular value, the value appears in the "Original Issue Category" field.	
	7	Hit tab in order to navigate to the next field.	The cursor is in the "Original Issue Sub-Category" field.	
	8	Select the "Original Issue Sub-Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values further describing the customer issue appears. After selecting a particular value, the value appears in the "Original Issue Sub-Category" field.	
	9	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Summary" field.	
	10	Enter the "Customer Expectation Summary" information.	The information is stored in this field. If the user clicks on the ellipsis button […] the entry window expands. The user can enlarge this window to view the entire entry.	
	11	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Category" field.	
	12	Select the "Customer Expectation Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated with customer expectations appears. After selecting a particular value the value appears in the "Customer Expectation Category" field.	
	13	Hit tab in order to navigate to the next field.	The cursor is in the "Customer Expectation Sub-Category" field.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	14	Select the "Customer Expectation Sub-Category" that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values associated further describing the customer expectation appears. After selecting a particular value the value appears in the "Customer Expectation Sub-Category" field.	
	15	Hit tab in order to navigate to the next field.	The cursor is in the "Referred By" field.	
	16	Select the "Referred By" category that best fits the issue. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the "Referred By" field.	
	17	Hit tab in order to navigate to the next field.	The cursor is in the "Last Name" field.	
	18	Press the F2 key.	The Pick Contact applet appears.	
	19	Select "Account" from the picklist in the **Find** field. Enter the SSN number for the test case under review.	The record does not exist in the database. As such, the Pick Contact Applet is blank	
	20	Click the New button at the bottom of the applet.	A blank record is opened.	
	21	Enter the "Contact Type" and the "Relationship / Title" for the contact record.	The selected values are displayed in the appropriate fields.	
	22	Click on the Account field. Hit F2 to bring up the Pick Account box. Click the New button.	The Pick Account box is displayed. A blank Account record is opened.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	23	Enter values for the following fields (if values for each field exist): Account, Account Type, First Name, Last Name, Suffix, Middle Initial, Prefix, Preferred Name, Date of Birth, Address, City, State, Zip, Country, Contact Method, Home Phone #, Work Phone #, Fax #, Country Code, Mobile Phone #, 1st Email / Homepage, 2nd Email, Hours Available, Hours Available Time Zone, Comments, and Reminders.	The values are stored in the appropriate fields.	
	24	Verify the record you just created is highlighted.	The record has a red arrow to the left.	
	25	Click the Pick button at the bottom of the Pick Account box.	The Pick Account box closes and the information is copied to the Contact record.	
	26	Click on the Pick button at the bottom of the Pick Contact applet.	The Last Name, First Name, Home Number and Account fields are populated.	
	27	Hit tab in order to navigate to the next field.	The cursor is in the “Svc Agency” field	
	28	Select the primary “Svc Agency” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Svc Agency” field	
	29	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Type” field	
	30	Select the primary “Loan Type” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Type” field	
	31	Hit tab in order to navigate to the next field.	The cursor is in the “Loan Status” field.	

Opening a New Case for a New Customer – Assignment Manager

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	32	Select the primary “Loan Status” involved in the case. You can bring the list of values associated with this field by pressing the F2 key, or by clicking the down arrow button.	A list of values appears. After selecting a particular value the value appears in the “Loan Status” field	
	33	On the List Applet at the top of the screen, click the hyperlink in the Account field pertaining to the record you just created.	This takes you to the Account Tab, Case View.	
	34	Verify that the data entered in the All Cases view is reflected in the account record.	All Account data elements are visible.	
	35	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	
	36	On the List Applet at the top of the screen, click the hyperlink in the Last Name field pertaining to the record you just created.	This takes you to the Contact Tab, Case View.	
	37	Verify that the data entered in the All Cases view is reflected in the contact record.	All Contact data elements are visible.	
	38	Click on the Back Arrow in the History Bar	This brings you back to the Case Tab, All Cases View.	
	39	Verify that the “Ombudsman” field has a value. If the field is blank, wait a few minutes, go to another view, then come back to this view and check the value.	The case has been automatically assigned to Joyce DeMoss.	