**151328: AHOBPR > Clinical Portal > Report > Ad Hoc by Individual > Save Report Criteria**



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Originator: Yager, Leslie P. (ASMR) Owner: Type: Manual

Test Data: Unassigned

Copied To:AHOBPR > Clinical Portal > Report > Ad Hoc by Location > Save Report Criteria Description:

# Summary

**Categories**

AHOBPR: Clinical Portal Test: Unassigned

# Formal Review

General Comments

**Manual Steps**

**Step 1**

**Execution Step**

Description\*

Log into the Clinical Portal

Expected Results

The Registry Search page is displayed

Comments Validates

Attachments

**Step 2**

**Execution Step**

Description\*

Click “Reporting” tab

Expected Results

Reporting > Status by Location Report is displayed by default.

Comments

Validates

Attachments

**Step 3**

**Execution Step**

Description\*

Select ‘Ad Hoc Report by Individual’ menu item

Expected Results

Reporting > Ad Hoc Report by Individual step 1 of 2 page is displayed

Comments Validates

Attachments

**Step 4**

**Execution Step**

Description\*

1. Select Data Element.
   * Admin Flag’
   * Questionnaire Start Date’
2. Click on <Go to Step 2> button.

Expected Results

Reporting > AD HOC Report by Individual page refreshes and displays with the following report menu options:

* Selection Criteria – Step 2 of 2 (Please select at least one)

Comments Validates

Attachments

**Step 5**

**Execution Step**

Description\*

1. Select Data Element.
   * Admin Flag: Leslie' s Admin Flag
   * Questionnaire Start Date: To Date: a month ago // From Date: todays date
2. Click <Run Report> button.

Expected Results

The REPORTING > AD HOC REPORT By INDIVIDUAL page refreshes and displays the Report Results

Comments Validates

Attachments

**Step 6**

**Execution Step**

Description\*

Click <Save Search Criteria> button

Expected Results

The REPORTING > AD HOC REPORT By INDIVIDUAL page refreshes and displays: Search Criteria Name – Text box

Comments Validates

Attachments

**Step 7**

**Execution Step**

Description\*

1. Enter Search Name into the Search Criteria Name text box
2. Click <Save Search Criteria> button

Expected Results

Pop-up box appears displaying: Save Successful

<OK> button

Comments

Validates Attachments

**Step 8**

**Execution Step**

Description\*

Click <OK> button

Expected Results

Pop-up box disappears and “Click here to load or delete saved search criteria” link is displayed at the top of the page.

Comments

Validates Attachments

**Step 9**

**Execution Step**

Description\*

Click ”Click here to load or delete saved search criteria” link

Expected Results

The Ad Hoc Report by Individual > Report Search Criteria page is displayed with the following information:

* Search Criteria Name
* Search Criteria
* Saved Date Time
* <Delete> button
* <Select> button

Comments Validates

Attachments

**Step 10**

**Execution Step**

Description\*

Click the <Select> button

Expected Results

The Ad Hoc Report by Individual Step 2 of 2 page displays with selection criteria entered.

Comments Validates

Attachments

**Step 11**

**Execution Step**

Description\*

Click ”Click here to load or delete saved search criteria” link

Expected Results

The Ad Hoc Report by Individual > Report Search Criteria page is displayed with the following information:

* Search Criteria Name
* Search Criteria
* Saved Date Time
* <Delete> button
* <Select> button

Comments Validates

Attachments

**Step 12**

**Execution Step**

Description\*

Click the <Delete> button

Expected Results

A pop-up message appears with the following message:

Are you sure you want to delete this report search criteria? Click cancel if you do not want to delete.

<OK> button

<Cancel> button

Comments

Validates Attachments

**Step 13**

**Execution Step**

Description\*

Click <OK> button

Expected Results

Pop-up box appears displaying: Save Successful

<OK> button

Comments Validates

Attachments

**Step 14**

**Execution Step**

Description\*

Click <OK> button

Expected Results

The Ad Hoc Report by Individual > Report Search Criteria page is displayed with the following information:

* Search Criteria Name
* Search Criteria
* Saved Date Time
* <Delete> button
* <Select> button

Note: if no saved searches the following message will display: No saved search criteria found for this report.

Comments Validates

Attachments

**Step 15**

**Execution Step**

Description\*

Click on the <Clear> button.

Expected Results

The selection criteria is clear.

Comments

Validates

Attachments

**Associated E-Signatures**

**Signed Action Signer Comment Additional Information**