**Validation Details**

This validation test covers change control module in iPassport.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: N/A

Changes to this area of iPassport:

No changes in this area.

**Pre-requisites:**

*Any user with the role, Global Editor (excluding admin) or Global Editor (excluding admin and personnel records) can perform this validation test. Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required.*

*You should have access to two users with the same access levels, the primary user and an alternative user.*

*This test creates a new change control record, access to more than one OU is not required*

*The time logged in iPassport should match your computer.*

*This validation document uses GMT if your account is set to a different time then please make the required time adjustments.*

*All names such as menu items and sub-menu items will be displayed in bold, for example* ***Noticeboard.***

*This test starts from within iPassport, signed in with the permissions described above.*

Note: This validation document does not cover risk assessment within the change control, there is a separate validation document for this.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| Menu | Hover over the **Quality Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Click the **Change Control** option | The **Change Control Requests** tab should be displayed |  |  |  |
| New Change Control | Click in the **New Change Control** tab | The **Create a new change control** screen should be displayed |  |  |  |
|  | Click the **Organisational Units** field | The field should expand and list all the OUs you have the ability to add a change control to |  |  |  |
|  | Select an OU | The OU should appear in the field |  |  |  |
|  | Click in the **Title** field | The cursor should appear in the field |  |  |  |
|  | Enter a title | The text should be visible in the field |  |  |  |
|  | Click the **Requested On** field | The calendar item should be displayed |  |  |  |
|  | Select yesterday/ the day prior to the validation test | The calendar item should close and the date should be displayed in the field |  |  |  |
|  | Check the **Requested By** field | This should show your user |  |  |  |
|  | Click the **Change Owner** field | The cursor should be visible in the field |  |  |  |
|  | Start to type your name | The field should narrow down to the letters typed  *Note: If switching between this document and the system without selecting a user it may lose focus. Just delete the text and type again.* |  |  |  |
|  | Select your name | Your name should appear in the field |  |  |  |
|  | Click the **Category** field | This should expand |  |  |  |
|  | Click the spanner icon **1** associated to the **Category** field | The **Change Request Categories** lightbox should be displayed |  |  |  |
|  | Click the **Add Change Request Categories** button | The **Name** field should appear |  |  |  |
|  | Click the **Create Change Request Categories** button | A warning message should be displayed informing you the name can’t be blank |  |  |  |
|  | Click in the **Name** field | The cursor should be visible in the field |  |  |  |
|  | Enter a new category | The text should be visible in the field |  |  |  |
|  | Click the **Create Change Request Categories** button | The new category should be added to the list of available categories |  |  |  |
|  | Check the **Actions** column for the row of your new category | You should be able to see a dustbin item and a pencil item |  |  |  |
|  | Click the dustbin item | The new category should be deleted |  |  |  |
|  | Click the **Add Change Request Categories** button | The **Name** field should appear |  |  |  |
|  | Click in the **Name** field | The cursor should be visible in the field |  |  |  |
|  | Enter a new category | The text should be visible in the field |  |  |  |
|  | Click the **Create Change Request Categories** button | The new category should be added to the list of available categories |  |  |  |
|  | Click the x button in the top right of the lightbox | The lightbox should close and you should be returned to the **Create new change control** screen |  |  |  |
|  | Check the **Category** field | The new category should be visible in the field |  |  |  |
|  | Click the **Create** button | A warning message should be displayed informing you the **Description can’t be blank** |  |  |  |
|  | Click in the **Description** field | The cursor should be visible in the field |  |  |  |
|  | Enter a description | Text should be visible in the field |  |  |  |
|  | Click the **Create** button | A new change request should be created and you should be on the **General** tab |  |  |  |
|  | Check the **Requested On** field | This should show the date you selected earlier |  |  |  |
|  | Click the pencil icon **2** associated to the **Requested On** field | The field should open and you should see the calendar icon as well as a **Save** and **Cancel** button |  |  |  |
|  | Change the date to a week before you have selected | The date should change  *Note: If you select the date and move away the field might lose focus and you have to select the date again.* |  |  |  |
|  | Click the **Save** button | The field should close and the new date should be visible |  |  |  |
|  | Click the **Log** tab | The tab should open |  |  |  |
|  | Check the most recent entry | This should be an **Update** entry |  |  |  |
|  | Check the details shown | Should show **Requested On** was changed… |  |  |  |
|  | Check the new date | This should be the same as the date you selected |  |  |  |
|  | Click the **General** tab | The tab should load |  |  |  |
|  | Check the header area of the record underneath the tab menu | You should see **Change control workflow status** |  |  |  |
|  | Check the first item | This should be **Triage** |  |  |  |
| Triaging the change control | Click the **Triage** button to the left | The **Triage** lightbox should be displayed |  |  |  |
|  | Check the **Triage On** date | This should be todays date |  |  |  |
|  | Click the **Triage On** field | The calendar should be displayed |  |  |  |
|  | Select the day prior to the validation test on the calendar | The calendar should close and the date should be visible in the **Triage On** field |  |  |  |
|  | Click the spanner under the **Rejection Reason** field | The **Change Rejection Reasons** lightbox should be displayed |  |  |  |
|  | Click the **Add Change Rejection Reason** item | The **Name** field should appear |  |  |  |
|  | Click **Name** field | The cursor should be visible in the field |  |  |  |
|  | Add a rejection reason | The text should be visible in the field |  |  |  |
|  | Click the **Create Change Rejection Reason** button | The new rejection reason should be visible in the list |  |  |  |
|  | Check the **Actions** column | A pencil icon and dustbin icon should be visible |  |  |  |
|  | Click the dustbin icon | The newly added change rejection reason should be removed from the list |  |  |  |
|  | Click the **Add Change Rejection Reason** item | The **Name** field should appear |  |  |  |
|  | Click **Name** field | The cursor should be visible in the field |  |  |  |
|  | **4** Add a rejection reason | The text should be visible in the field |  |  |  |
|  | Click the **Create Change Rejection Reason** button | The new rejection reason should be visible in the list |  |  |  |
|  | Click the x in the top right corner of the lightbox | The lightbox should be closed and you should be returned to the **General** tab |  |  |  |
|  | Click the **Triage** button to the left | The **Triage** lightbox should be displayed |  |  |  |
|  | Check the **Triage On** date | This should be todays date |  |  |  |
|  | Click the **Rejection Reason** field | The cursor should be visible and the list should appear |  |  |  |
|  | Start to type your rejection reason created earlier | The list should filter down (if there are multiple items on the list) and your rejection reason should star to be highlighted |  |  |  |
|  | Click your rejection reason | The rejection reason should be displayed in the field |  |  |  |
|  | Click the x next to the rejection reason | The rejection reason should be removed and the field should be empty |  |  |  |
|  | Click the **Triage Comments** field | The cursor should be visible in the field |  |  |  |
|  | Add a comment | Text should be visible in the field |  |  |  |
|  | Click the **Implementation User** field | The field should expand and show a list of staff |  |  |  |
|  | Start to type the name of your alternative user | The list should filter down |  |  |  |
|  | Click the name of your alternative user | The name should appear in the Implementation User field and the list should close |  |  |  |
|  | Click the **Implement By** field | The calendar should be displayed |  |  |  |
|  | Select a date one week from the day of the validation test | The calendar should close and the date should be shown in the field |  |  |  |
|  | Click the **Approve** button | The lightbox should close and you should be returned to the **General** tab |  |  |  |
|  | Check the header area underneath the tabs | You should see that it has been triaged by your primary user and it is to be implemented by your alternative user  **5** *Note: If you have other users selected to triage in settings they might also appear here, this is normal.* |  |  |  |
|  | Scroll down to the Implementation area | The screen should scroll |  |  |  |
|  | Check the **Target Implementation Date** field | This should show one week from your validation test (the date you selected) |  |  |  |
|  | Check the **Implemented By** field | This should show your alternative user |  |  |  |
|  | Click the logout button | You should be logged out of iPassport |  |  |  |
| Implementing the change control | Log in as your alternative user | You should be logged into iPassport on the landing page of the alternative user |  |  |  |
|  | Click **My Tasks** in the left sidebar | The **My Tasks** item should expand |  |  |  |
|  | Click in the search field at the top of the **My Tasks** area | The cursor should be visible in the field |  |  |  |
|  | Type “control” in the field and click the magnifying glass or return on your keyboard | The text should be visible in the field and the task list should filter down |  |  |  |
|  | Check the results | You should see a **Change Control Implementation** task in the list |  |  |  |
|  | Click the **Change Control Implementation** task | The change control record should open while the task is highlighted |  |  |  |
|  | Check the area underneath the workflow area | You should see a **Change Control Implementation** box |  |  |  |
|  | Check the **Due** area of the field (top right) | This should show a date one week from your validation test (the date you selected) |  |  |  |
|  | Check the **Requested By** item | This should be your primary user |  |  |  |
|  | Check the **Requested On** item | This should be todays date (if performing the validation test on the same day) |  |  |  |
|  | Click the **6 Implement**  button in the **Change Control Implementation** area | The **Implementation** lightbox should open |  |  |  |
|  | Check the **Change Implemented By** field | This should show your alternative user |  |  |  |
|  | Check the **Implemented On** field | This should show todays date |  |  |  |
|  | Click the **Implemented On** field | The calendar item should be displayed |  |  |  |
|  | Select yesterday on the calendar | The calendar item should close and yesterday’s date should be shown in the field |  |  |  |
|  | Click the **Set follow-up** review user | The field should expand |  |  |  |
|  | Start to type the name of your primary user | The list should filter down |  |  |  |
|  | Click your primary user | The name should be visible in the field |  |  |  |
|  | Click the **Follow-up date** field | The calendar item should be displayed |  |  |  |
|  | Select tomorrows date | The calendar item should close and the date should be visible in the field |  |  |  |
|  | Click the **Implementation Notes** field | The cursor should be visible in the field |  |  |  |
|  | Add an implementation note | Text should be visible in the field |  |  |  |
|  | Click the **Save** button | The lightbox should close and you should be returned to the **General** tab |  |  |  |
|  | Check the workflow area | You should be able to see the **Triage** and **Implementation** steps have been completed and there is a new **Review** step assigned to your primary user |  |  |  |
|  | Scroll down to the **Implementation** area | The screen should scroll |  |  |  |
|  | Check the **Implemented By** field | This should show your alternative user |  |  |  |
|  | Check the **Implemented Date** | This should show yesterday (the day before to your validation test) |  |  |  |
|  | Check the **Implementation Notes** filed | This should show the note you added in the field when implementing the change control |  |  |  |
| Follow up review | Scroll down to the **Follow Up Review** section of the change control record | The screen should scroll |  |  |  |
|  | Check the **Review By** field | This should show your primary user |  |  |  |
|  | Check the **Review Due Date** field | This should show tomorrow (day after your validation test date) |  |  |  |
|  | Click the **Logout** button | You should be logged out of iPassport |  |  |  |
|  | Login as your primary user | You should be logged in |  |  |  |
|  | Hover over the **Quality Management** main menu item | The sub-menu list should be displayed |  |  |  |
|  | Click the **Change Control** sub-menu item | The **Change Control Requests** tab should be displayed |  |  |  |
|  | Click the **Date** field | The field should expand and show a number of options |  |  |  |
|  | Select the **Follow-up Due Date** option from the list | **Follow-up Due Date** should appear in the field |  |  |  |
|  | Click the **Date is after** field | The calendar item should be displayed |  |  |  |
|  | Click todays date | Todays date should display in the field and the search result should filter down  *Note: This assume the validation test is being performed on the one day* |  |  |  |
|  | Check the **Change Control** filtered results | You should see your change control record listed |  |  |  |
|  | Check the **Status** column for the row of your change control | The status should show as **Awaiting Review** |  |  |  |
|  | Click the row for your change control | The change control should open on the **General** tab |  |  |  |
|  | Check the **Change Control Review** area underneath the workflow | This should show the details of the review |  |  |  |
|  | Check the **Due** date displayed | This should show tomorrows date |  |  |  |
|  | Click the **Review** button in the **Change Control Review** area | The **Follow-up Review** lightbox should be displayed |  |  |  |
|  | Click the **Reviewed On** field | The calendar item should be displayed |  |  |  |
|  | Click todays date | The calendar item should close and the date visible in the field |  |  |  |
|  | Click in the **Follow-up Review Notes** field | The cursor should eb visible in the field |  |  |  |
|  | Add a note | The text should be displayed in the field |  |  |  |
|  | Click the **Save** button | The lightbox should close and you should be returned to the **General** tab |  |  |  |
|  | Check the workflow area | You should see that the **Triage**, **Implementation** and **Review** steps have all been completed |  |  |  |
|  | Scroll down to the **Follow Up Review** area | The screen should scroll |  |  |  |
|  | Check the **Review Completed Date** | This should be the same as entered previously |  |  |  |
| Creating a new change control | Hover over the **Quality Management** main menu item | The sub-menu should be displayed |  |  |  |
|  | Scroll down and click the + sigh to the right of the **Change Control** item | The **Create a new change control screen** should load |  |  |  |
|  | Click the **Title** field | The cursor should be visible in the field |  |  |  |
|  | Add a new title | The text should be visible in the field |  |  |  |
|  | Click the **Create** button | A warning message should be displayed informing you the **Description can’t be blank** |  |  |  |
|  | Click the in the **Description** field | The cursor should be visible in the field |  |  |  |
|  | Add a description | Text should be visible in the field |  |  |  |
|  | Click the **Create** button | The new change request should be created and should open on the **General** tab |  |  |  |
|  | Check the **Requested By** field | This should show the primary user |  |  |  |
|  | Click the pencil edit icon | The field should open |  |  |  |
|  | Select the text in the field | The text should be highlighted |  |  |  |
|  | Start to type the name of your secondary user | The text should be visible and the field should filter down the results |  |  |  |
|  | Select the secondary user | The user should appear in the field |  |  |  |
|  | Click the **Save** button | The field should close and the secondary user should be displayed |  |  |  |
| Log of changes | Click the **Log** tab | The tab should be displayed |  |  |  |
|  | Check the most recent log entry | This should show the same time as recorded earlier |  |  |  |
|  | Check the details | The details should show “…from *(primary user)* to *(secondary use*r)” |  |  |  |
| Triage | Click the **General** tab | The tab should be displayed |  |  |  |
|  | Click the **Triage** button to the left of the workflow area | The **Triage** lightbox should be displayed |  |  |  |
|  | Click the **Request Reason** field | The rejection reasons should be listed |  |  |  |
|  | Select the rejection reason previously entered | The rejection reason should be displayed in the field |  |  |  |
|  | Click away from the field in ‘empty space’ | The rejection reason list should be hidden |  |  |  |
|  | Click the **Triage Comments** field | The cursor should be visible in the field |  |  |  |
|  | Enter a triage comment | The text should be visible in the field |  |  |  |
|  | Click the **Reject** button in the lower left corner of the lightbox and make a note of the time | The lightbox should close and you should be returned to the **General** tab |  |  |  |
|  | Check the **Change control workflow status** area | The **Triage** entry should be visible |  |  |  |
|  | Check the **Triage** entry | This should show a thumbs down entry |  |  |  |
| Log of changes | Click the **Log** tab | The tab should be displayed |  |  |  |
|  | Check the most recent entry | This should show the time when the triage was rejected |  |  |  |
|  | Expand the most recent entry using the chevron icon to the right | The entry should expand |  |  |  |
|  | Check the **Status** recorded | This should show “…from **awaiting\_triage** to **rejected**” |  |  |  |
| Triage rejection | Click the **General** tab | The tab should be displayed |  |  |  |
|  | Scroll down to the **Triage** area of the change control record | The record should scroll |  |  |  |
|  | Check the **Rejection Reasons** | This should be the rejection reasons selected earlier |  |  |  |
|  | Check the **Triage Comments** areas | This should show the comment entered previously when rejection the triage |  |  |  |
| Searching for a change control | Click the **Change Control Requests** tab | The tab should load and display change control requests |  |  |  |
|  | Click the **Status** field | The **Status** field should expand and show the status options |  |  |  |
|  | Select the **Rejected** option | The option should be displayed in the field and the results should be filtered down |  |  |  |
|  | Check the change control requests listed | You should be able to see the recently rejected change control request listed |  |  |  |
| Creating a new change control | Hover over the **Quality Management** main menu item | The sub-menu should be displayed |  |  |  |
|  | Scroll down and click the + sigh to the right of the **Change Control** item | The **Create a new change control screen** should load |  |  |  |
|  | Click the **Title** field | The cursor should be visible in the field |  |  |  |
|  | Add a new title | The text should be visible in the field |  |  |  |
|  | Click the **Create** button | A warning message should be displayed informing you the **Description can’t be blank** |  |  |  |
|  | Click the in the **Description** field | The cursor should be visible in the field |  |  |  |
|  | Add a description | Text should be visible in the field |  |  |  |
|  | Click the **Create** button | The new change request should be created and should open on the **General** tab |  |  |  |
|  | Click the **Actions** drop down menu item in the top right corner | The **Actions** drop down should expand |  |  |  |
|  | Select the **Delete this Change Control** option | The option should be displayed in the field |  |  |  |
|  | Click the **Go** button | The **New delete change control** lightbox should be displayed |  |  |  |
|  | Click the **Delete Permanently** button in the lower right corner of the lightbox | A warning message should be displayed informing you that **Deletion comments are required** |  |  |  |
|  | Click in the **Reason for Deletion** field | The cursor should be visible in the field |  |  |  |
|  | Enter a reason for deleting the change control | Text should be visible in the field |  |  |  |
|  | Click the **Delete Permanently** button in the lower right corner of the lightbox | The lightbox should close and you should be returned to the **Change Control Requests** tab  *Note: This assume the above pathway is followed.* |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 24th July 2020 | Document released |
| v1.1 | 21st August 2021 | 1 – Changed the language used to locate the spanner icon  2 - Changed the language used to locate the pencil icon  3 – (Not show) Row deleted as there is now expand option in the log tab in this version  4 – Added the row to clarify the process  5 – Added a note to explain other possible users listed on the triage area  6 – Corrected the button name  7 – (Not shown) Row deleted as the associated field is not shown at this stage  8 - (Not show) Row deleted as there is now expand option in the log tab in this version |