**Validation Details**

This validation test covers the change request function found within controlled documents area of iPassport.

The test is designed specifically to cover requesting change requests for a controlled document, approving or rejecting them and carry them over to a new version of a controlled document.

**Changes between iPassport versions:**

Current version: v3.5.1

Previous version: v3.4.0

Changes to this areaof iPassport: No changes, this is new to v3.4.0 of iPassport

**Pre-requisites:**

Administration access is not required for this test.

The settings option, “Disable verification step for the document reviews” should be selected for this test. To confirm this, go to

**Administration->Settings->Organisational Unit Preferences-> *Select Relevant OU (from dropdown)* ->Document Control->** *Tick checkbox next to* “**Disable verification step for the document reviews**”.

This process requests a change on an authorised, controlled document; to complete the validation test you need to have multiple user accounts to ensure that requests can be made and accepted/ rejected by alternative staff. Make a note of the index number for the controlled document as this is needed later.

Ensure that both staff members have access to the same document. The second user should have 10 or fewer tasks as this process uses the **My Tasks** sidebar, if you have more than this then you can go directly to the document if you wish. The second user should be marked as the document owner for the test document, if you are using an older document simply add them as a document owner from the controlled document **Search** tab (select the document by clicking on its checkbox on the left and the **Transfer Ownership** option should appear).

All users need to have access to the controlled document being used for the test.

It is recommended that you check the automatic log out time for the account (this can be obtained from iPassport support) before commencing validation as some steps may require you are you to be logged in for longer than the 15 minutes’ default period.

There are repetitions in this validation document; these are necessary as there are multiple pathways that can be used to record and obtain information.

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

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  | Log into iPassport (as the primary user) | - - - - - - |  |  |  |
| Menu | Hover over the **Laboratory Records** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Controlled Documents** sub-menu item  | The **Controlled Documents** sub-menu item should be highlighted |  |  |  |
|  | Click the **Controlled Documents** sub-menu item | The controlled documents **Search** tab should be loaded |  |  |  |
|  | Click in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the controlled document | The search results should filter and show your controlled document |  |  |  |
|  | Click the line in the search results for your controlled document | The controlled document should load on the **General** tab |  |  |  |
|  | Check underneath the **General** tab | The **Request Change** button should be visible |  |  |  |
| Info. The Request Change button is visible to all users that have access to the controlled document, with change requests possible on all different statuses of controlled document. |
| Change request | Click the **Request Change** button | The request change lightbox should be displayed |  |  |  |
|  | Check the change request number | The change request number should be displayed as **Change Request #1** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Click the **Submit** button | A warning message should be displayed reading **You have not requested any changes** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Enter the text “requested change 1” | The text should be visible in the field |  |  |  |
|  | Click the **Request Another Change** button | Another change request field should open |  |  |  |
|  | Check the change request number of the new field | The change request number should be displayed as **Change Request #2** |  |  |  |
|  | Click the **Submit** button | The change request lightbox should close and you should be returned to the **General** tab (this is the tab we started from) |  |  |  |
| Info. The change request lightbox closed in this instance because a change request had been entered, so the system allows you to progress without entering the second change request. The assumption is that all the change requests have been made. If not then simply click the **Request Change** button again. If after clicking the **Request Change** button you wish to cancel then click the **x** at the top right of the lightbox. |
| Feedback/ review | Click the **Feedback** (or **Review**, depending on account preference) tab | The feedback tab should load |  |  |  |
|  | Check the entry | It should show **Change Request change requested (+ date)** (in the second column) |  |  |  |
|  | Click the entry | A lightbox should open |  |  |  |
|  | Check the lightbox | This should display three buttons: **Approve**, **Approve For Future** and **Reject** |  |  |  |
|  | Click the x button in the top right corner of the lightbox | The lightbox should close and you should be returned to the **Feedback** tab (the tab we started from) |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Log in as the secondary (alternative) user | You should be logged in as the secondary (alternative) user |  |  |  |
|  | Click the **My Tasks** sidebar | The **My Tasks** sidebar should open |  |  |  |
|  | Check the **My Tasks** side bar | There should be a **Change Request** entry |  |  |  |
|  | Check the details on the **Change Request** entry  | It should show that you created the change request |  |  |  |
|  | Click the **Change Request** item (leave the sidebar open) | You should be taken to the **General** tab of your controlled document |  |  |  |
| Approving a change request | Check the area just below the grey bar with record tabs | There should be a **Review a Change Request** item |  |  |  |
|  | Click the **Approve** button | The **Approve Change Request** lightbox should be displayed |  |  |  |
| Info. The change request has been approved but this still needs to be incorporated in the document, approving the change request simply states that it should be included.  |
|  | Click the **Approve** button | You should be returned to the **General** tab (this is the tab we started from) |  |  |  |
|  | Check the **My Tasks** sidebar  | The **Change Request** should have now changed colour (green) |  |  |  |
|  | Click the refresh button in the header of the **My Tasks** area (in line with **My Top 10 Tasks**) | The sidebar should refresh and the **Change Request** should be removed |  |  |  |
|  | Click the **Feedback** tab | The **Feedback** tab should load |  |  |  |
|  | Check your previous change request entry | This should now show **Change Request/ change requested** (in the second column) |  |  |  |
|  | Check the **Comments** column for your request | You should see the comment “requested change 1” |  |  |  |
| Info. It is possible to reject an already accepted/ approved change request from the Feedback tab. You simply need to click the **Reject** button for the change request to be rejected; it is recommended that a comment is added as well. |
|  | Click the **General** tab | The **General** tab should load |  |  |  |
|  | Click the **History** tab | The **History** tab should load |  |  |  |
|  | Check the top entry (most recent entry) | This should read **Change Request Approved** |  |  |  |
|  | Click the **Logout** button | You should be logged out of iPassport |  |  |  |
| Menu | Log into iPassport (as the primary user) | - - - - - - |  |  |  |
|  | Hover over the **Laboratory Records** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Controlled Documents** sub-menu item  | The **Controlled Documents** sub-menu item should be highlighted |  |  |  |
|  | Click the **Controlled Documents** sub-menu item | The controlled documents **Search** tab should be loaded |  |  |  |
|  | Click in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the controlled document | The search results should filter and show your controlled document |  |  |  |
|  | Click the line in the search results for your controlled document | The controlled document should load on the **General** tab |  |  |  |
|  | Check underneath the **General** tab | The **Request Change** button should be visible |  |  |  |
| Change request | Click the **Request Change** button | The request change lightbox should be displayed |  |  |  |
|  | Check the change request number | The change request number should be displayed as **Change Request #1** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Click the **Submit** button | A warning message should be displayed reading **You have not requested any changes** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Enter the text “new requested change” | The text should be visible in the field |  |  |  |
|  | Click the **Submit** button | You should be returned to the **General** tab (this is the tab we started from) |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Log in as the secondary (alternative) user | You should be logged in as the secondary (alternative) user |  |  |  |
| Rejecting a change request | Click the **My Tasks** sidebar | The **My Tasks** sidebar should open |  |  |  |
|  | Check the **My Tasks** side bar | There should be a **Change Request** entry |  |  |  |
|  | Check the details on the **Change Request** entry  | It should show that the primary user created the change request |  |  |  |
|  | Click the **Change Request** item (leave the sidebar open) | You should be taken to the **General** tab of your controlled document |  |  |  |
|  | Click the **Feedback** tab | You should be taken to the **Feedback** tab |  |  |  |
|  | Check the change requests | There should now be two change requests, one (the new one) showing **Change Request change requested (+ date)** (in the second column) and one (previously approved) **Change Requested** |  |  |  |
|  | Click the Reject button on the **Change Request** awaiting approval | The **Reject Change Request** lightbox should be displayed |  |  |  |
|  | Click in the edit field | The cursor should be visible in the edit field |  |  |  |
|  | Type “not needed” into the field | The text should be visible in the field |  |  |  |
|  | Click the **Reject** button | The light box should close and you should be returned to the **Feedback** tab (this is the tab we started from) |  |  |  |
|  | Check the rejected change request | It should show **Change Request Change rejected** |  |  |  |
|  | Check the **Event** column for the rejected change request | This should show **Change Rejected** and by the secondary (alternative) user |  |  |  |
| Info. It is not possible to change your mind on a rejected change request; if this needs to be included then it should be submitted again. |
|  | Click the **Logout** button | You should be logged out of iPassport |  |  |  |
| Menu | Log into iPassport (as the primary user) | - - - - - - |  |  |  |
|  | Hover over the **Laboratory Records** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Controlled Documents** sub-menu item  | The **Controlled Documents** sub-menu item should be highlighted |  |  |  |
|  | Click the **Controlled Documents** sub-menu item | The controlled documents **Search** tab should be loaded |  |  |  |
|  | Click in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the controlled document | The search results should filter and show your controlled document |  |  |  |
|  | Click the line in the search results for your controlled document | The controlled document should load on the **General** tab |  |  |  |
|  | Check underneath the **General** tab | The **Request Change** button should be visible |  |  |  |
| Change request | Click the **Request Change** button | The request change lightbox should be displayed |  |  |  |
|  | Check the change request number | The change request number should be displayed as **Change Request #1** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Click the **Submit** button | A warning message should be displayed reading **You have not requested any changes** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Type “change for future” in the editor field | The text should be visible in the field |  |  |  |
|  | Click the **Submit** button | The light box should close and you should be returned to the **General** tab (this is the tab we started from) |  |  |  |
|  | Click the **Feedback** tab | The **Feedback** tab should be displayed |  |  |  |
|  | Check the details | There should be three change request items displayed, the new one should be displayed at the top |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Log in as the secondary (alternative) user | You should be logged in as the secondary (alternative) user |  |  |  |
|  | Click the **Tasks** item in the iPassport header area | The **Tasks** area should open on the **My Tasks** tab |  |  |  |
|  | **Check the Tasks tab** | This should display a number in the tab and a list of tasks |  |  |  |
|  | Click in the **Search Text** field  | The cursor should be visible in the **Search Text** field |  |  |  |
|  | Type a portion of the controlled document index into the **Search Text** field | The task list/ results should filter down and show you the **Change Request** task associated with your document |  |  |  |
| Info. When the change request was created, it was not assigned to a specific person, anyone assigned as a document owner can pick the change request up as a task and complete this. So, if you had 5 document owners anyone of them would have access to the task and would be able to complete it. |
|  | Click the **task details** arrow | The task should expand and reveal the **Reject, Approve** and **Approve For Future** options |  |  |  |
|  | Click the **hide details** arrow | The task should collapse |  |  |  |
|  | Select the text in the **Search Text** field | The text should be highlighted |  |  |  |
|  | Delete the text | The text should be removed and the task list should resort |  |  |  |
|  | Expand/ click the **Type** field | The type options should be displayed |  |  |  |
|  | Select the **Change Request Review** option | The **Change Request Review** option should be displayed and the task list should filter down and show the change request task |  |  |  |
|  | Click the task row (just under the **Task Details** header) | You should be taken to the **General** tab of the controlled document |  |  |  |
|  | Check the **General** tab | There should be a **Review a Change Request** area with three buttons |  |  |  |
|  | Click the **Approve For Future** button | The **Approve For Future** lightbox should be displayed |  |  |  |
|  | Click in the edit field | The cursor should be visible |  |  |  |
|  | Enter “include in next version” text | The text should be visible |  |  |  |
|  | Click the **Approve For Future** button | The lightbox should be closed and you should be returned to the **General** tab (as this is where we accessed it from) |  |  |  |
| Info. Approve for future allows you to say that this change request should be incorporated but it can wait for the next review or version. |
|  | Click the **Feedback** tab | The **Feedback** tab should be displayed |  |  |  |
|  | Check the top item | It should display **Change Request Change Approved for future** |  |  |  |
|  | Check the **Actions** column | There should be two buttons available: **Reject** and **Include in This Version** |  |  |  |
| Info. These options allow you to convert this approved for future change request into a rejected one or into one for this version. |
|  | Click the **History** tab | The **History** tab should load |  |  |  |
|  | Check the top/ most recent entry | This should be **Change Request Approved For Future Version** |  |  |  |
|  | Expand the item using the arrow | The item should expand and reveal further details |  |  |  |
|  | Check the details | The text should include **“include in next version”** |  |  |  |
|  | Expand the **Actions** drop down menu (found near the top of the page, to the right of the document title) | The menu should expand |  |  |  |
|  | Select **Create New Version** | The **Create New Version** option should be displayed in the **Actions** drop down menu |  |  |  |
|  | Click the **Go** button | The **Create new version** for lightbox should be displayed |  |  |  |
|  | Click the **Create new version** button | The lightbox should close, a new draft document should be created and you should be taken to the **General** tab of the Draft document. |  |  |  |
|  | Check the **Review summary for this draft** box | There should be a note saying **1 change request approved for future version** |  |  |  |
|  | Click the **View Details in the Feedback tab** link | You should be taken to the **Feedback** tab |  |  |  |
|  | Check the details | There should be one entry for **Change Request approved for future** |  |  |  |
|  | Click the **Include in This Version** button | The **Approve Change Request** lightbox should be displayed |  |  |  |
|  | Click in the editor field | The cursor should be displayed in the editor field |  |  |  |
|  | Enter “Add to this version” in the editor field | The text should be visible in the editor field |  |  |  |
|  | Tick the **Append Change** checkbox | This should be selected |  |  |  |
|  | Click the **Approve** button | The lightbox should close and you should be returned to the **Feedback** tab (this is the tab we accessed the request from) |  |  |  |
|  | Check the **Feedback** tab | The entry should show **Change Requested** |  |  |  |
|  | Click the **General** tab | The **General** tab should load |  |  |  |
|  | Check the **Review summary for this draft** box | There should be two buttons visible on the right: **Request Authorisation** and **Authorise Document**  |  |  |  |
| Info. The **Request Authorisation** button is only available if the feature is activated, so if this is not visible then pass with the **Authorise** button only. |
|  | Click the **Authorise Document** button | The **Authorise** lightbox should be displayed |  |  |  |
|  | Scroll down the lightbox | The lightbox should scroll |  |  |  |
|  | Check the **Edit Changes in this Version Note** field | It’s checkbox should be blank by default |  |  |  |
|  | Select the **Edit Changes in this Version Note** field | The checkbox should be ticked and the section should expand |  |  |  |
| Info. This field automatically pulls through any approved change request comments, the edit option allows for these comments to be adjusted. These comments are issued as part of the skill confirmation email to inform the users of changes between versions. As such it is recommended that the comments be edited to remove any unnecessary approval information. |
|  | Click in the **Changes in this version** field | The cursor should be visible in the field |  |  |  |
|  | Scroll down in the field | The field should scroll |  |  |  |
|  | Check the details  | There should be an **Approver Comments** sectionwith the previously added comment, **“***Add to this version*” |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 23rd July 2018 | Document created |
| v.1.1 | 22nd Jan 2020 | Minor updates to reflect current interface |