**Validation Details**

This validation test covers the creation of an individual controlled document, using the **‘New Document’** tab. It goes as far as setting up a document as a draft, before the publishing process starts. A review feedback task is created to show the value of ‘Source File Reference’ numbers.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of iPassport:

Document creation has been simplified to reduce the number of steps required and to bring the source files to the foreground. As well as making source files easier to manage, each new source file now carries a reference number to help pinpoint review feedback information.

**Pre-requisites:**

Only one user is required to run this test but names of two other users are required to declare a document owner and author. The primary user requires *Policy Editor* permissions; the *Global Editor* roles also contain all the necessary permissions.

*Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required.*

*Emails are not delivered from the Validation account to prevent confusion with production account emails.*

Two documents are required for this exercise, one as the controlled document and one as an attachment.

PLEASE NOTE: The validation account does not currently have the ability to convert Word (.docx) files to PDF format as all other accounts do. To be able to preview documents on screen, only upload PDF files as the source document in the validation account.

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.

This procedure should be performed within a test or training account so that unwanted records are not stored within a live account.

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* | - - - - - - |  |  |  |
| MENU | Hover over the **Laboratory Records** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Controlled Documents** sub-menu | The **Controlled Documents** item should be highlighted |  |  |  |
|  | Click the plus **[+]** sign next to the sub-menu, **Controlled Documents** | The **New Document** tab should open |  |  |  |
|  | Click the **Organisational Unit** field | A dropdown menu of OUs available to the user should appear; users who only have access to one OU won’t see this field and can skip the next step |  |  |  |
|  | Select an appropriate OU where to place the new document | The dropdown menu should collapse, leaving the selected OU in the field |  |  |  |
| NOTE: Users who only have permission to create controlled documents in one OU won’t see the **Organisational Unit** field. | | | | | |
|  | Click the **Document Type** field | A dropdown menu with up to 7 choices should appear, depending on the user’s permissions |  |  |  |
|  | Select the option, *Policy* | The type, *Policy* should display in the field and new fields should appear below |  |  |  |
|  | Scroll down and click **Save** | A warning box should appear at the top of the form with three items:   1. Name can't be blank 2. Author(s) must be selected 3. Controlled document procedure is required |  |  |  |
|  | Click the field **Document Title** | The cursor should blink inside the field |  |  |  |
|  | Enter an appropriate title for the new document | The field should turn from pink to white and the text entered should display in it |  |  |  |
|  | Click the ‘cog/gear’ icon under the field, **Index** | The text, *“Auto Generate”* should disappear leaving the field blank |  |  |  |
|  | Click the **Index** field | It should turn pink and the cursor should blink inside it |  |  |  |
|  | Enter any imaginary index for the new document (we will delete it so it can be trivial) in the **Index** field | The field should turn from pink to white and the text entered should display in it |  |  |  |
|  | Click the ‘cog/gear’ icon under the field, **Index** | The text, *“Auto Generate”* should replace the index entered; upon completion, the system will generate the index based on rules in the Settings area |  |  |  |
|  | Click inside the uploading dotted area, marked, “*Click to Upload the Source File (or drag it into this area)*” | A browser ‘*search and select*’ window should appear |  |  |  |
|  | Find and select the source document to add, then click **Open** (some browsers use a different word) | The selected document should appear in the upload area as an icon with a link below - ‘**Remove File’** |  |  |  |
|  | Click the word *‘Filter’* in the **Document Owner(s)** multi-select field | The word *‘Filter’* should disappear and the cursor should blink in its place |  |  |  |
|  | Start typing the name of the intended document owner | The list of users below should filter down to match the entered text |  |  |  |
|  | Locate and tick the checkbox by the intended owner’s name | The checkbox should appear ticked next to the document owner; more owners can be selected if required |  |  |  |
|  | Click the word *‘Filter’* in the **Author(s)** multi-select field | The word *‘Filter’* should disappear and the cursor should blink in its place |  |  |  |
|  | Start typing the name of the document author | The list of users below should filter down to match the entered text |  |  |  |
|  | Locate and tick the checkbox by the author’s name | The checkbox should appear ticked next to the document author; more authors can be selected if required |  |  |  |
|  | In the **Category** search-and-select field, hover over the area where categories are listed and scroll up and down | If any categories are listed, they will scroll up and down |  |  |  |
|  | Select any category deemed appropriate by ticking the radio button next to it, if one is available | The selected category should have its radio button highlighted |  |  |  |
| NOTE: The field, **‘Section’** helps to further classify documents like categories do. It will be skipped in this test. Also, the fields, **‘Subject’, ‘Introduction and Scope’** and **‘Expiry Date’** are left out of this exercise. The **‘Expiry Date’** can be used to automatically inactivate a document on a given date. | | | | | |
|  | Click the button, **Create** | The screen should refresh to load the new draft document’s **General** tab |  |  |  |
| §§§ End of controlled document creation |  |  |  |  |  |
| Adding source files | Locate the section, **Source File** in the **General** tab | A rectangle with the **File Name, Reference** and other fields should be visible; it should also display the button, **Upload File** |  |  |  |
|  | Click the title of the file under **File Name** | The source file should be downloaded locally (usually to the Downloads folder) |  |  |  |
|  | Click **Upload File** | The area should expand to provide a dotted rectangle with the label, “*Click to Upload the Source File (or drag it on this area)*” |  |  |  |
|  | Click inside the dotted area, marked, “*Click to Upload the Source File (or drag it into this area)*” | A browser ‘*search and select*’ window should appear |  |  |  |
|  | Find and select the source file just downloaded, then click **Open** (some browsers use a different word) | After uploading the document, the section will refresh and display the same fields as before plus the link, *‘View All Uploads for this version of the document’* |  |  |  |
| NOTE: The link, *‘View All Uploads for this version of the document’* only shows when there is more than one source file. | | | | | |
| Source File Ref. Number | Click the link, *‘View All Uploads for this version of the document’* | A lightbox should open and should list the source files added above |  |  |  |
|  | Check the **Reference** column | A unique reference formed of letters and numbers should appear in each row |  |  |  |
| NOTE: Even if the same file is uploaded twice, each instance will have a unique reference number; this allows editing the document offline and reimporting it. | | | | | |
|  | Click the ‘**X**’ in the top right corner of the lightbox to close it | The screen should return to the **General** tab of the new draft |  |  |  |
|  | Click the **Reviews** tab | The document’s **Reviews** tab should open and display only a *‘Creation’* item |  |  |  |
|  | Click **(+) Request Review Feedback** | A **Request Review Feedback** lightbox should appear |  |  |  |
|  | Click the field, **Review to be completed before** | A calendar should pop up |  |  |  |
|  | Select tomorrow’s date | Tomorrow’s date should display in the field |  |  |  |
|  | In the field **Users**, find and select yourself by scrolling and ticking the checkbox next to your name | The name of the person logged in should be ticked |  |  |  |
|  | Click **Submit** | The lightbox should close and a new entry should appear in the **Reviews** tab with three blue buttons on the right |  |  |  |
|  | Check the information in the **Event** column | It should state that the review feedback was requested on a draft and the *source file reference* should match that of the most recent upload |  |  |  |
|  | Click the button, **No Changes Required** on the right | A new lightbox should appear with a field to add comments |  |  |  |
|  | Click **Complete Review** | The lightbox should disappear and the ‘Review Feedback’ entry should no longer have blue buttons on the right |  |  |  |
| NOTE: Review feedback can be requested from multiple users and in several iterations as the document gets refined. Change requests are covered in another test. | | | | | |

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| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 23rd July 2021 | Document created |
| v1.1 | 29thSeptember 2021 | Minor correction and comments added. |