**Validation Details**

This validation test covers Deleting Content in iPassport. Not all content can be deleted but there are many types of records that can be deleted. This test will focus on examples that are special cases but otherwise use the same process that applies to the other types.

**Changes between iPassport versions:**

Current version: v3.4.15

Previous version: N/A

Changes to this area of iPassport:

N/A – New (document)

**Pre-requisites:**

Two users are required:

User A will act as administrator and must at least have the permissions, “*Manage Settings*”, “*Documents: Create Documents*”, “*Documents: Authorise Documents*”*,* “*Internal Audits: Create Internal Audits*” and “*Records: Delete Records*”. When using a test account, user A can be assigned the roles, *Administration Editor* and *Global Editor (excluding admin).* When using the Validation account, user A can be a member of the user group, *Validation*, which includes all permissions.

User B can be a simple viewer with the role, *Global Viewer (excluding admin)* in the same OU as that of the document used for this test.

This process describes how to delete unwanted records and also, how to limit users’ ability to do so. Two records are created as part of the exercise so they can be deleted safely; they are not fully populated as they are only for the purpose of this test. If there are already records available to delete, the first section of the validation test can be skipped to start the test at the section, “*Delete Internal Audit*”. The two types of records required for this test are an Internal Audit (ideally with a non-compliance) and an authorised Document with at least one superseded version and skilled staff in the superseded version.

Please refer to the user guide, *Deleting Records* for additional information on this subject.

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

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 as user A, with the permissions described above.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| **RECORD CREATION SECTION** | SKIP IF YOU ALREADY HAVE RECORDS TO DELETE |  |  |  |  |
| §§§ |  |  |  |  |  |
| Create Internal Audit | Hover over the **Quality Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the plus sign **[+]** by the **Internal Audits** sub-menu | The **Internal Audits** plus sign **[+]** item should be highlighted |  |  |  |
|  | Click the **Internal Audits** plus sign **[+]** item | The **New** **Internal Audits** page should open (Step 1 of 3) |  |  |  |
|  | Enter a name in the **Name** field | The field should turn from pink to yellow as text is entered |  |  |  |
|  | Click in the field under **Schedule On** and select a date in the near future from the pop-up calendar | The date selected should appear in the **Schedule On** field |  |  |  |
|  | Click **Next Page** | The page should refresh to display, **New Internal Audit Step 2 of 3** |  |  |  |
|  | Click **Next Page** | The page should refresh to display, **New Internal Audit Step 3 of 3** |  |  |  |
|  | From the **Available Checklists** box, select the checklist, *Validation Test* if using the *Validation* account; otherwise, select any available checklist or none at all | The selected checklist’s checkbox should appear ticked |  |  |  |
|  | Click **Create Audit** | The new audit should open to its **General** tab |  |  |  |
| Add a Non-Compliance to the Internal Audit | Click the **Checklists** tab | The page should refresh to show the sections of the checklist added. If none was added, please skip to the “*Create a Document*” section |  |  |  |
|  | Click the magnifying glass icon under **Action** of the first section listed | The steps of the section selected should be displayed |  |  |  |
|  | Click the “**X**” icon under **Actions** of the first step displayed | A lightbox should pop-up to create a non-compliance |  |  |  |
|  | Assign **Non-Compliance Responsibility** to the user logged in by ticking their checkbox in the corresponding field | The checkbox by the selected user should appear ticked |  |  |  |
|  | Click **Create** | The window should return to the previous screen – checklist section steps |  |  |  |
|  | Click the **Non-Compliances** tab | The newly created non-compliance should appear listed |  |  |  |
|  | Click the magnifying glass under **Actions** of the non-compliance | A lightbox should appear showing the details of the non-compliance |  |  |  |
|  | Make note of the non-compliance number | This non-compliance should be deleted when the internal audit gets deleted |  |  |  |
|  | Click the “X” on the top right corner to close the lightbox | The screen should return to the **Non-compliances** tab |  |  |  |
| §§§ |  |  |  |  |  |
| Create a Document | Hover over the **Laboratory Records** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the plus sign **[+]** by the **Controlled Documents** sub-menu | The **Controlled Documents** plus sign **[+]** item should be highlighted |  |  |  |
|  | Click the **Controlled Documents** plus sign **[+]** item | The **New** **Document** tab should open to step 1 |  |  |  |
|  | Click the **Import Documents** tab | The **Import Documents** screen should be displayed. |  |  |  |
|  | If in the *Validation* account, select the OU, *Validation*; otherwise select an appropriate OU from the **Organisational Unit** dropdown menu | The selected OU should appear in the field under **Organisational Unit** |  |  |  |
|  | Click in the field under, “*Please choose a document type*” and select the type, *Document* from the dropdown menu | The type, *Document* should be displayed in the field under, “*Please choose a document type*” |  |  |  |
|  | Click **Next Step** | The screen should refresh to show step 2 of 4 |  |  |  |
|  | Enter a name for the document in the field, **Document Title** | The field should turn from pink to yellow as text is entered |  |  |  |
|  | Select the name of user B in the **Document Owner(s)** selection box | The checkbox by user B should appear ticked |  |  |  |
|  | Select the name of user A in the **Author(s)** selection box | The checkbox by user A should appear ticked |  |  |  |
|  | Click **Next Step** | The screen should refresh to show step 3 of 4 |  |  |  |
|  | Click **Next Step** | The screen should refresh to show step 4 of 4 |  |  |  |
|  | Click the **Choose File** button under **File** | A browser selection window should appear |  |  |  |
|  | Find and select an appropriate document to upload – any small Word or PDF file will do | The document should appear highlighted |  |  |  |
|  | Click the **Choose/Open** button, according to the browser used | The browser selection window should close and the chosen document’s name should appear next to the **Choose File** button |  |  |  |
|  | Click **Upload** | After a few seconds a banner displaying, “Document uploaded successfully” should appear |  |  |  |
|  | Click **Create** | The screen should refresh to show the **General** tab of the newly created document |  |  |  |
| Authorise document | Click the **Authorise Document** button in the **Review Summary** box | The **Authorise** lightbox should pop-up, with the field **Initial Version** displaying, “1.0” |  |  |  |
|  | Untick the checkbox by “**Set Next Compulsory Review for this Document**” | The area should collapse, hiding the fields immediately below |  |  |  |
|  | Scroll down and click **Authorise** | The screen should refresh to show the **General** tab of the now authorised version 1.0 |  |  |  |
| Add Skilled Staff | Click the **Skilled** tab | The tab title should display “**Skilled(0)**” and the list below should display “*No Staff Members found*” |  |  |  |
|  | Click **[+]Add Trained Staff** | The **Add Trained Staff to <document name>** lightbox should open |  |  |  |
|  | Click in the **Search** field and start typing user A’s name | A list of options should start showing below |  |  |  |
|  | Select the name from the list below by clicking the add (+) symbol on the right | The name should disappear from the list to be added in the background |  |  |  |
|  | Click in the **Completed date** field | A pop-up calendar should appear |  |  |  |
|  | Click on today’s date | The calendar should collapse and the date should show in the field |  |  |  |
|  | Click the “X” on the top right of the lightbox | The lightbox should close and there should be a new row with user A’s name, *Confirmed* status and today’s date |  |  |  |
| Create New Version | Click in the **Actions** field on the right and select, *Create New Version* from the dropdown menu | The **Actions** field should display, *Create New Version* |  |  |  |
|  | Click **Go** | The **Create new version** lightbox should pop up |  |  |  |
|  | Click the **Create new version** button | The screen should refresh to show the new draft version |  |  |  |
| Authorise v2.0 | Click the **Authorise Document** button in the **Review Summary** box | The **Authorise** lightbox should pop-up |  |  |  |
|  | Click in the **Document Revision** field and select, *Major Revision* | The message, “*Authorising this controlled document will increment the version number to 2*” should appear below |  |  |  |
|  | Scroll down and click **Authorise** | The screen should refresh to show the **General** tab of the now authorised version 2.0 |  |  |  |
| §§§ |  |  |  |  |  |
| **RECORD DELETION SECTION** | VALIDATION TEST STARTS HERE | User A should be signed in |  |  |  |
| §§§ |  |  |  |  |  |
| Delete an Internal Audit | Hover over the **Quality Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Internal Audits** sub-menu | The **Internal Audits** item should be highlighted |  |  |  |
|  | Click the **Internal Audits** item | The **Search Internal Audits** tab should open |  |  |  |
|  | Start typing the name of the internal audit to delete in the **Search** field; use the one created above if applicable | The list of internal audit search results below should start narrowing to match the search string |  |  |  |
|  | Click the row of the intended internal audit when it appears below | The audit should open to its **General** tab |  |  |  |
|  | Click in the **Actions** field on the right | A dropdown menu should expand |  |  |  |
|  | Click **Delete this Internal Audit** | The option, **Delete this Internal Audit** should be displayed |  |  |  |
|  | Click **Go** | A lightbox with the name of the audit should appear, with the clear warning, “*You're about to permanently delete this Internal Audit. This action cannot be undone!*  *Are you sure you want to continue?*” |  |  |  |
|  | Enter a **Reason for Deletion** in the field provided | The text entered should be displayed in the field. |  |  |  |
|  | Ensure the checkbox under, “*Delete ALL Linked Non Compliances (if any exist)?*” is ticked. | The checkbox should have a tick mark in it |  |  |  |
|  | Click the **Delete Permanently** button | The internal audit should disappear and the screen should return to the **Search Internal Audits** tab |  |  |  |
| Check deletion of Non-Compliance | If a non-compliance was created for the internal audit, hover over the **Quality Management** main menu; if not, skip to *Delete Documents.* | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Non-Compliances** sub-menu | The **Non-Compliances** item should be highlighted |  |  |  |
|  | Click the **Non-Compliances** item | The **Search Non-Compliances** tab should open |  |  |  |
|  | Enter the name of the non-compliance (from the internal audit deleted) in the **Search** field | The search result list below should display, “*No items found matching the term…*” |  |  |  |
| §§§ |  |  |  |  |  |
| Delete Documents | 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 **Controlled Documents** item | The **Search** tab should open |  |  |  |
|  | Start typing the name of the document to delete in the **Search** field; use the one created above if applicable | The list of controlled document search results below should start narrowing to match the search string |  |  |  |
|  | Click the row of the intended document when it appears below | The document should open to its **General** tab |  |  |  |
|  | Click the bar labelled, “**Click to view document details**” | The area should expand to reveal the document’s details |  |  |  |
|  | Confirm that user B is listed as a *Document Owner*; if so, skip to the section, *Inactivate Superseded Version* | User B should appear listed under, *Document Owner(s)*; if not, follow steps below (*Transfer Ownership*) |  |  |  |
| §§§ |  |  |  |  |  |
| Transfer Ownership | Click the **Back** button by the document title or return to the Controlled Document Search tab with the document listed | The document should appear listed in the search results below |  |  |  |
|  | Tick the **select** checkbox in the left column of the row of the document to transfer ownership | The checkbox should appear ticked in the row of the document |  |  |  |
|  | Click the **Transfer Ownership** button above the search result area | The transfer ownership lightbox should load |  |  |  |
|  | Click the **Show Current Document Owners on Selected Documents** option | The **Show Current Document Owners on Selected Documents** option should expand and show user A for this document |  |  |  |
|  | Click in the **New Owner** field | The cursor should be visible in the **New Owner** field |  |  |  |
|  | Start to type user B’s name | A dropdown menu should filter down results matching the character string entered |  |  |  |
|  | Click user B’s name | The name should display in the **New owner** field |  |  |  |
|  | Check the details beneath the **New Owner** field | The **Add this owner to the current list of owners** option should be selected |  |  |  |
|  | Click the **Update Owner** button | The lightbox should close and a **Successfully transferred ownership…** message should be displayed briefly at the top of the screen. |  |  |  |
| §§§ |  |  |  |  |  |
| Inactivate Superseded Version | Open the document to be deleted to its **General** tab (if the previous section, *Transfer Ownership*, was skipped, the correct page should be displaying) | If using the document created above, its title should display, followed by *“(version 2.0)*” |  |  |  |
|  | Click the **vX.X (Superseded)** button below the document title | If using the document created above, the button should read, **v1.0 (Superseded)**; clicking it should navigate to that version of the document |  |  |  |
|  | Click in the **Actions** field on the right and select, *Set as Inactive* from the dropdown menu | The **Actions** field should display, *Set as Inactive* |  |  |  |
|  | Click **Go** | The **Change state** lightbox should pop up |  |  |  |
|  | Click **Continue** | The page should refresh and the word, “*Inactive*” should appear before the document title |  |  |  |
| §§§ |  |  |  |  |  |
| NOTE: Even Inactive documents cannot be deleted if they are superseded: | | | | | |
|  | Click in the **Actions** field on the right and look for the option, *Delete this Inactive Document* from the dropdown menu | It should not be listed |  |  |  |
| §§§ |  |  |  |  |  |
| Disallow Document Owner privileges | Hover over the **Administration** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Settings** sub-menu | The **Settings** item should be highlighted |  |  |  |
|  | Click the **Settings** item | The Settings area should open to the **System Preferences** tab |  |  |  |
|  | Click the **Organisational Unit Preferences** tab | The page should refresh to display the **Organisational Unit Preferences** tab |  |  |  |
|  | Click in the **Organisational Unit** field | A dropdown menu of available OUs should appear |  |  |  |
|  | Select the OU where the document used for this test belongs | The OU name should display in the *Organisational Unit* field |  |  |  |
|  | Click the **Document Control** row | The page should refresh to show the Document Control page for the selected OU |  |  |  |
|  | Ensure the checkbox for the preference, “*Allow Document Owners to perform any action on their documents, regardless of permissions*” is un-ticked | The checkbox should be visibly blank |  |  |  |
|  | Scroll down and click **Save** | The page should return to display the **Organisational Unit Preferences** tab |  |  |  |
|  | User A **Logout** | The session should end and the **Log in** page should display |  |  |  |
| §§§ |  |  |  |  |  |
| Revert to Draft Disallowed | User B Log in | User B should be logged in |  |  |  |
|  | 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 **Controlled Documents** item | The **Search** tab should open |  |  |  |
|  | Start typing the name of the document that user B was made owner of in the **Search** field | The list of controlled document search results below should start narrowing to match the search string |  |  |  |
|  | Click the row of the intended document when it appears below | The document should open to its **General** tab |  |  |  |
|  | Click in the **Actions** field on the right and look for the option, *Revert to Draft* from the dropdown menu | It should not be listed |  |  |  |
|  | User B **Logout** | The session should end and the **Log in** page should display |  |  |  |
| §§§ |  |  |  |  |  |
| Re-enable Document Owner Privileges | User A Log in | User A should be logged in |  |  |  |
|  | Hover over the **Administration** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Settings** sub-menu | The **Settings** item should be highlighted |  |  |  |
|  | Click the **Settings** item | The Settings area should open to the **System Preferences** tab |  |  |  |
|  | Click the **Organisational Unit Preferences** tab | The page should refresh to display the **Organisational Unit Preferences** tab |  |  |  |
|  | Click in the **Organisational Unit** field | A dropdown menu of available OUs should appear |  |  |  |
|  | Select the OU where the document used for this test belongs | The OU name should display in the *Organisational Unit* field |  |  |  |
|  | Click the **Document Control** row | The page should refresh to show the Document Control page for the selected OU |  |  |  |
|  | Ensure the checkbox for the preference, “*Allow Document Owners to perform any action on their documents, regardless of permissions*” is ticked | The checkbox should be visibly ticked |  |  |  |
|  | Scroll down and click **Save** | The page should return to display the **Organisational Unit Preferences** tab |  |  |  |
|  | User A **Logout** | The session should end and the **Log in** page should display |  |  |  |
| §§§ |  |  |  |  |  |
| Revert to Draft Allowed | User B Log in | User B should be logged in |  |  |  |
|  | 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 **Controlled Documents** item | The **Search** tab should open |  |  |  |
|  | Start typing the name of the document that user B was made owner of in the **Search** field | The list of controlled document search results below should start narrowing to match the search string |  |  |  |
|  | Click the row of the intended document when it appears below | The document should open to its **General** tab |  |  |  |
|  | Click in the **Actions** field on the right and select for the option, *Revert to Draft* from the dropdown menu | The option, *Revert to Draft* should be listed in the Actions field |  |  |  |
|  | Click Go | A lightbox should appear, with the clear warning, “*Are you sure you want to revert this document to draft and set the superseded version as current?*  *This action cannot be undone!*” |  |  |  |
|  | Click the radio button for the option, **Do Nothing** under, **Skill Reissue Options** | The option, *Do Nothing* should appear selected |  |  |  |
|  | Click **Revert to Draft** | The document page should refresh to show the message, “*This is a DRAFT/unauthorised Document - DO NOT USE*” under its title |  |  |  |
| NOTE: For information about these skill options, please refer to the user guide, *Deleting Documents*. | | | | | |
|  | User B **Logout** | The session should end and the **Log in** page should display |  |  |  |
| §§§ |  |  |  |  |  |
| Delete Document reverted to draft | User A Log in | User A should be logged in |  |  |  |
|  | 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 **Controlled Documents** item | The **Search** tab should open |  |  |  |
|  | Click in the field under **Status** and select the option, *Draft* | The Status field should display the option, *Draft* |  |  |  |
|  | Start typing the name of the document that user B reverted to draft in the **Search** field | The list of controlled document search results below should start narrowing to match the search string |  |  |  |
|  | Click the row of the intended document when it appears below | The document should open to its **General** tab |  |  |  |
|  | Click in the **Actions** field on the right and select the option, *Delete this Draft* from the dropdown menu | The option, *Delete this Draft* should be displayed in the Actions field |  |  |  |
|  | Click **Go** | A lightbox should appear, with the clear warning, “*You're about to permanently delete this document. This action cannot be undone!*  *Are you sure?*” |  |  |  |
|  | Enter a **Reason For Deletion** in the field provided | Th text should display in the **Reason For Deletion** field |  |  |  |
|  | Click **Delete Permanently** | The screen should refresh to show the previous *Inactive* version |  |  |  |
| §§§ |  |  |  |  |  |
| Delete Inactive Documents | Click in the **Actions** field on the right and select the option, *Delete this Inactive Document* from the dropdown menu | The option, *Delete this Inactive Document* should be displayed in the Actions field |  |  |  |
|  | Click **Go** | A lightbox should appear, with the clear warning, “*You're about to permanently delete this document. This action cannot be undone!*  *Are you sure?*” |  |  |  |
|  | Enter a **Reason For Deletion** in the field provided | Th text should display in the **Reason For Deletion** field |  |  |  |
|  | Click **Delete Permanently** | If the document created in this test or one with no previous versions was used, the screen should refresh to show the Controlled documents Search tab; otherwise, the screen should refresh to show the previous version of the document |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.2 | 3rd Dec 2019 | Added record requirements in Pre-requisites section |
| v1.1 | 29th Nov 2019 | Extended document creation to include skilled staff |
| v1.0 | 10th Sep 2019 | Document created |