**Validation Details**

This validation test covers a review process of a controlled document in ***iPassport*** using workflows and with no change requests raised.

The test is designed specifically to cover the process of starting a review cycle, following the workflow to mark the document as reviewed and extend the next review date for another period.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: A review validation test was released with v3.4.0; since then, major changes have been made in the process and this test is the second part of a series of 4 validation tests which cover the revisioning process of a controlled document.

Changes to this area of iPassport: document review workflows were introduced in v3.5.5; publishing workflows were added in v3.6.0; settings which support these features have been added as well. Both review workflows and publishing workflows include an approval step to help streamline the work of directors.

**Pre-requisites:**

Administration access is not required for this test. One user with ‘Global Editor’ permissions is required to run the test as the owner of the document. The users involved in the review cycle only require ‘Global Viewer’ permissions. The primary user requires access to these accounts to complete the test.

*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.*

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**”.

Depending on the location of the account, the document record menu tab, **Reviews**, might be named, **Feedback**; it will be referred to as **Reviews** throughout this exercise.

This process uses an existing **controlled document** in **authorised** state and it should have review and publishing workflows in place. The document from the previous validation test, *“Doc Review Setup validation\_v1.0”* can be used. If the series of validation tests has been followed in order, this document should have review and publishing workflows in place.

*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 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** |
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|  | Log into iPassport | - - - - - - |  |  |  |
| **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 the **OU** search filter field | A dropdown list of OUs available to the user should appear |  |  |  |
|  | Select the OU where the document and workflows for this test reside | The dropdown list should disappear and the selected OU should display in the field |  |  |  |
|  | Click in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the controlled document intended for this test | The search results should filter and show your controlled document |  |  |  |
|  | Click the line of your controlled document in the search results | The controlled document should load on the **General** tab |  |  |  |
| **Review Settings** | Click the **Review Settings** button | The ‘Manage Review Settings’ lightbox should be displayed |  |  |  |
|  | Check that the checkbox for **‘Require periodic review of this document’** is ticked | If not ticked, select it so that all the workflow details are displayed below |  |  |  |
|  | Check the **‘Review Workflow:’** field | It should display the document review workflow assigned in the previous test |  |  |  |
| NOTE: A document review workflow with at least one review and one approval round is required to continue with this test. Whether a custom workflow or a pre-existing general workflow is used, please ensure you have access to the accounts of the users involved. If any changes are made to the review settings, they must be saved before closing the lightbox. | | | | | |
|  | Click the **“X”** in the top right corner of the lightbox | The lightbox should close and the **General** tab of the document should be displayed |  |  |  |
| **Start Review Cycle** | Click the **Actions** field to the right of the document title | A dropdown list of options should appear |  |  |  |
|  | Select the option, *‘Start Review Workflow’* | The list should disappear and the selected option should show in the field |  |  |  |
|  | Click **Go** | A lightbox should appear to inform that tasks will be created and the process will be recorded in the ‘Reviews’ tab |  |  |  |
|  | Click **Start** | The lightbox should close and the screen should refresh to display a workflow summary of the review process |  |  |  |
| NOTE: Document review cycles are automatically triggered by the system when the next review date approaches; they can also be triggered at any time as shown above. | | | | | |
|  | Check the **‘Review Round 1’** box | Two users should be listed in blue boxes and the text, *“Proceed to next step when at least one person has completed their task”* should show below them |  |  |  |
|  | Click the **Tasks** tab | The **Tasks** tab should load and display two ‘review feedback’ tasks for the two reviewers listed in the workflow summary; their due dates should be in line with the values set in the review workflow |  |  |  |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Review Feedback tasks** | Log in as one of the *reviewers* | The alternate user should be logged in |  |  |  |
|  | Click **‘My Tasks’** in the left sidebar | The **‘My Tasks’** sidebar should expand and a ‘Review Feedback’ task for the document in this test should be listed |  |  |  |
| TIP: If the user has many tasks listed, the filter below the search field in the MyTasks sidebar can be set to filter only *‘Review Feedback Tasks’*; it normally defaults to *‘All Task Types’*. | | | | | |
|  | Locate and click the review feedback task related to this test | The screen should refresh and open the document in question; a light blue rectangle should contain the details of the task; two buttons should be available – **‘Request Changes’** and **‘No Changes Required’** |  |  |  |
|  | Click **‘No Changes Required’** | A lightbox where comments can be entered should appear |  |  |  |
|  | Click the **‘Complete Review’** button | The lightbox should close and the light blue task box should have disappeared |  |  |  |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Complete Review Cycle** | Log in as the primary user | The primary user should be logged in |  |  |  |
|  | Click **‘History** in the left sidebar | The **‘History** sidebar should expand and the document for this test should appear listed at the top |  |  |  |
|  | Click the ‘view’ item of the document for this test | The screen should refresh to display the **General** tab of the document |  |  |  |
|  | Check the **‘Review Round 1’** box | The box with the name of the *reviewer* who just completed the review feedback task should have turned green; the other *reviewer’s* box should have turned grey |  |  |  |
|  | Click the **Tasks** tab | The **Tasks** tab should load and display two ‘review feedback’ tasks for the two reviewers listed in the workflow summary; one should be completed, the other still due |  |  |  |
|  | Click the **General** tab | The **General** tab should load |  |  |  |
|  | In the *‘Complete Review Cycle’* box within the workflow summary, click the button, **Complete Review Cycle** | The *‘Complete Compulsory Review’* lightbox should open |  |  |  |
|  | Click the **‘Comments’** field and enter some text | The text entered should display in the field |  |  |  |
|  | Check the date in the field, **‘Next Review Date’** | The date should be one year from today, according to the 12-month frequency set in the review workflow |  |  |  |
|  | Click the button, **‘Complete Document Review’** | The lightbox should close and the workflow summary should refresh; the *‘Complete Review Cycle’* box should reflect the action just completed and the *approver* box (to the right) should have turned blue |  |  |  |
|  | Click the **Tasks** tab | The **Tasks** tab should load; only the completed ‘review feedback’ task should be listed (the one not completed becomes invalid); a new ‘review approval’ task, due in 7 days, should show on the list |  |  |  |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Approve the review cycle** | Log in as the review *approver* | The alternate user should be logged in |  |  |  |
|  | Click **Tasks** in the global menu (top right corner of screen) | The **Tasks** area should open and show the **My Tasks** filter |  |  |  |
|  | Click the filter, **‘Documents to Approve’** | The tab should open and the number of documents listed should match the number in the small red circle on the tab title |  |  |  |
|  | Locate the document for this test in the list | The document should appear listed |  |  |  |
|  | Click the icon with a ticked checkbox in the **Actions** column, in the row of the identified document | A lightbox should appear with a ‘comments’ field and a field for the **‘Next Review Date’** showing the date one year from today |  |  |  |
|  | Click the **‘Approve’** button | The lightbox should close and the document should be removed from the list |  |  |  |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Check Review History** | Log in as the primary user | The primary user should be logged in |  |  |  |
|  | Click **‘History** in the left sidebar | The **‘History** sidebar should expand and the document for this test should appear listed at the top |  |  |  |
|  | Click the ‘view’ item of the document for this test | The screen should refresh to display the **General** tab of the document |  |  |  |
|  | Click the **Reviews** tab | The **Reviews** tab should load; the details of each step completed in the review cycle should be listed |  |  |  |

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| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 17th August 2021 | Document created |