**Validation Details**

This validation test covers Document Sharing across OUs in iPassport, designed to allow designated users access to documents they would normally not have permissions for.

**Changes between iPassport versions:**

Current version: v3.5.0

Previous version: v3.4.9

Changes to this area of iPassport:

N/A – New (document)

**Pre-requisites:**

Three users are required for this test. User “A” will act as an administrator with at least the roles, *Administration Editor* and *Global Editor (excluding admin)* in two OUs (we’ll call OU1 and OU2). *Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required for user A.* User “B” will act as an editor who can share documents and will require the role, *Global Editor (excluding admin)* only in OU1. User “C” will act as a viewer, with the role, *Global Viewer (excluding admin and personnel records)* in OU2 but not in OU1.

This process describes how to share documents with other users or OUs. One authorised document in OU1 and one authorised document from OU2 are required for the exercise. Please refer to the user guide, *Document Sharing* for description, explanations and illustrations of this area.

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

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** |
| --- | --- | --- | --- | --- | --- |
|  | *User A*, log in | User A’s default landing screen should open |  |  |  |
| Menu | 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 **Organisational Unit Preferences** screen should open |  |  |  |
| OU Settings | Select *OU1* from the **Organisational Unit** dropdown menu | *“OU1”* should display in the text box |  |  |  |
|  | Click in the row labelled **Document Control** | The page titled, “*Document Control for OU1”* should open |  |  |  |
|  | Ensure the checkbox for, *Enable sharing Controlled Documents in this OU*  Is ticked | A check mark should appear next to the option, *Enable sharing Controlled Documents in this OU* |  |  |  |
|  | If any change was made, click **Save** at the bottom of the page or else, click **Cancel** | The page should close and return to the **Organisational Unit Preferences** tab |  |  |  |
|  | Repeat the 4 steps above to enable sharing documents in *OU2* as well | Both *OU1* and *OU2* should have sharing enabled |  |  |  |
|  | User A, log out | iPassport should close and return to the login page |  |  |  |
| Share Controlled Document; method 1 | *User B*, log in | User B’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **Search** field and start typing the index or title of the document in *OU1* to share | The results in the document list below should start narrowing down |  |  |  |
|  | When the document to share appears listed, tick its **select** checkbox in the left column | The checkbox should have a tick mark and the header section of the search results should display, “1 items selected” |  |  |  |
|  | Click the **Share Documents** button above the search results, on the right | A lightbox (pop-up window) should appear, titled, “**Share access to 1 documents**” |  |  |  |
|  | Click inside the field, **Share with** | A dropdown menu should expand |  |  |  |
|  | Select the choice, *User* | The lightbox should populate with more fields |  |  |  |
|  | Under **Select User(s)**, click in the text field, then find and select U*ser C* either by entering the name (even partially) in the text box or by scrolling down the list | U*ser C*’s name should appear in the text box with an “X” to the right of the name |  |  |  |
|  | Click outside of the text field to collapse the dropdown list of users | The dropdown list of users should disappear to reveal the fields below |  |  |  |
|  | Under **Select a permission level**, click in the text field and select, *Read* | The word, “Read” should display in the text box |  |  |  |
|  | Click the **Share** button at the bottom of the lightbox | The lightbox should close and another should open with the message, “*Successfully Shared Selected Document(s)*” |  |  |  |
|  | Click **Close** | The lightbox should close to return to the **Controlled Documents**, **Search** tab |  |  |  |
|  | Click in the row of the shared document | The document should open to its **General** tab |  |  |  |
|  | Click the **Sharing** tab | The **Shared with** area should display under this tab with a record of the sharing just performed with *User C* |  |  |  |
| Sharing in other OUs restricted by permissions | Click the **Search** tab at the top of the page | The screen should refresh to display the **Controlled Documents**, **Search** area |  |  |  |
|  | Click inside the **OU** field and select *OU2* or any OU that’s not OU1 | There should be no documents with a checkbox on the left column |  |  |  |
|  | Click inside the row of any of the documents listed | The document should open and the **Sharing** tab should only be visible if sharing is enabled for that OU |  |  |  |
| NOTE: Even if the **Sharing** tab is available, only users with permissions will see the **Share** button and the **delete** (trash/bin) icon | | | | | |
|  | *User B*, log out | iPassport should close and return to the login page |  |  |  |
| Access to shared documents | *User C*, log in | *User C*’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **OU** field and select *OU1* | The search results should narrow down to display the shared document; there shouldn’t be any other documents under that OU, unless they have also been shared or *User C* is the owner |  |  |  |
|  | Click in the row of the shared document | The document should open to its **General** tab |  |  |  |
|  | Check under the **Actions** dropdown menu that no edit options like, *Create New Version* are visible | The dropdown menu should only offer basic options like, *Generate Link* |  |  |  |
|  | *User C*, log out | iPassport should close and return to the login page |  |  |  |
|  | *User B*, log in | *User B*’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **Search** field and start typing the index or title of the shared document | The results in the document list below should start narrowing down |  |  |  |
|  | When the shared document appears listed, click its row to open it | The document should open to its **General** tab |  |  |  |
|  | Click the **Sharing** tab | The **Shared with** area should display under this tab with a record showing it’s shared with *User C* |  |  |  |
|  | Click the **delete** (trash/bin) icon under the **Actions** column on the right of the sharing record | A dialogue box should open to ask, “*Are you sure you want to stop sharing this item with User: User C?*” |  |  |  |
|  | Click **OK** | The sharing record should disappear |  |  |  |
| Share Controlled Document; method 2 | Click **Share**, found on the right side of the header section of the **Shared with** area | A lightbox should appear, titled, “**Share ‘***document name’* ” |  |  |  |
|  | Click inside the field, **Share with** | A dropdown menu should expand |  |  |  |
|  | Select the choice, *User* | The lightbox should populate with more fields |  |  |  |
|  | Under **Select User(s)**, click in the text field, then find and select U*ser C* either by entering the name (even partially) in the text box or by scrolling down the list | U*ser C*’s name should appear in the text box with an “X” to the right of the name |  |  |  |
|  | Click outside of the text field to collapse the dropdown list of users | The dropdown list of users should disappear to reveal the fields below |  |  |  |
|  | Under **Select a permission level**, click in the text field and this time select, *Edit* | The word, “Edit” should display in the text box |  |  |  |
|  | Click the **Share** button at the bottom of the lightbox | The lightbox should close and a new sharing record should appear under **Shared with** |  |  |  |
|  | *User B*, log out | iPassport should close and return to the login page |  |  |  |
|  | *User C*, log in | *User C*’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **OU** field and select *OU1* | The search results should narrow down to display the shared document; there shouldn’t be any other documents under that OU, unless they have also been shared or *User C* is the owner |  |  |  |
|  | Click in the row of the shared document | The document should open to its **General** tab |  |  |  |
|  | Check under the **Actions** dropdown menu that edit options like, *Create New Version* are visible | The dropdown menu should now offer edit options like, *Create New Version* and *Review Document* |  |  |  |
|  | *User C*, log out | iPassport should close and return to the login page |  |  |  |
| Share with entire OU | *User A*, log in | User A’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **Search** field and start typing the index or title of the shared document | The results in the document list below should start narrowing down |  |  |  |
|  | When the shared document appears listed, click its row to open it | The document should open to its **General** tab |  |  |  |
|  | Click the **Sharing** tab | The **Shared with** area should display under this tab with a record showing it’s shared with *User C* |  |  |  |
|  | Click the **delete** (trash/bin) icon under the **Actions** column on the right of the sharing record | A dialogue box should open to ask, “*Are you sure you want to stop sharing this item with User: User C?*” |  |  |  |
|  | Click **OK** | The sharing record should disappear |  |  |  |
|  | Click the **Search** tab at the top of the page | The screen should refresh to display the **Controlled Documents**, **Search** area |  |  |  |
|  | Click inside the **Search** field and start typing the index or title of the second document to share, from *OU2* | The results in the document list below should start narrowing down |  |  |  |
|  | When the document to share appears listed, tick its checkbox on the left column | The checkbox should have a tick mark and the header section of the search results should display, “1 items selected” |  |  |  |
|  | Click the **Share Documents** button above the search results, on the right | A lightbox should appear, titled, “**Share access to 1 documents**” |  |  |  |
|  | Click inside the field, **Share with** | A dropdown menu should expand |  |  |  |
|  | Select the choice, *Organisational Unit* | The lightbox should populate with appropriate fields |  |  |  |
|  | Under **Select Target Organisational Unit(s)**, click in the text field, then find and select *OU1* either by entering its name (even partially) in the text box or by scrolling down the list | *OU1* should appear in the text box with an “X” to the right of its name |  |  |  |
|  | Click outside of the text field to collapse the dropdown list of OUs | The dropdown list of OUs should disappear to reveal the fields below |  |  |  |
|  | Under **Select a permission level**, click in the text field and select, *Read* | The word, “Read” should display in the text box |  |  |  |
|  | Click the **Share** button at the bottom of the lightbox | The lightbox should close and another should open with the message, “*Successfully Shared Selected Document(s)*” |  |  |  |
|  | Click **Close** | The lightbox should close to return to the **Controlled Documents**, **Search** tab |  |  |  |
|  | *User A*, log out | iPassport should close and return to the login page |  |  |  |
|  | *User B*, log in | User B’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **Search** field and start typing the index or title of the second shared document | The results in the document list below should start narrowing down |  |  |  |
|  | When the shared document appears listed, click its row to open it | The document should open to its **General** tab |  |  |  |
|  | Check under the **Actions** dropdown menu that no edit options like, *Create New Version* are visible | The dropdown menu should only offer basic options like, *Generate Link* (even though this user has edit permissions in the target OU) |  |  |  |
|  | *User B*, log out | iPassport should close and return to the login page |  |  |  |
| Remove OU settings | *User A*, log in | User A’s default landing screen should open |  |  |  |
|  | 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 **Organisational Unit Preferences** screen should open |  |  |  |
|  | Select *OU1* from the **Organisational Unit** dropdown menu | *“OU1”* should display in the text box |  |  |  |
|  | Click in the row labelled **Document Control** | The page titled, “*Document Control for OU1”* should open |  |  |  |
|  | Untick the checkbox for, *Enable sharing Controlled Documents in this OU* | No check mark should show next to the option, *Enable sharing Controlled Documents in this OU* |  |  |  |
|  | Click **Save** at the bottom of the page | The page should close and return to the **Organisational Unit Preferences** tab |  |  |  |
|  | User A, log out | iPassport should close and return to the login page |  |  |  |
|  | *User B*, log in | User B’s default landing screen should open |  |  |  |
|  | 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 **Controlled Documents** area should open to the **Search** tab |  |  |  |
|  | Click inside the **Search** field and start typing the index or title of one of the shared documents | The results in the document list below should start narrowing down |  |  |  |
|  | When the shared document appears listed, click its row to open it | The document should open to its **General** tab and the **Sharing** tab should not be visible |  |  |  |
| Sharing disabled in an OU | Click the **Back** button (not the browser button but the blue internal button in iPassport) and tick the **select** checkbox in the left column of another authorised document from OU1 | The checkbox should have a tick mark and the header section of the search results should display, “1 items selected” |  |  |  |
|  | Click the **Share Documents** button above the search result area | A banner should briefly appear at the top stating, “*One or more of the selected documents cannot be shared as sharing is disabled via the documents OU preference.*” |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| V1.1 | 22nd Nov 2019 | Document updated to reflect functionality change in Sharing tab visibility |
| v1.0 | 12th Jul 2019 | Document created |