**Validation Details**

This validation test covers document workflow management in ***iPassport***.

The test includes the process of assigning a document workflow to multiple existing documents and the adjustments required in the settings area to automatically assign specified workflows to new documents created in the future.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of iPassport: No changes - this is new to iPassport.

**Pre-requisites:**

One user with administration access is required for this test. The role, *‘Administration Editor’* provides access to the whole administration area but the role, *‘Controlled Document Workflow Editor’* which only gives access to the **Administration > Workflows** area will suffice. ‘Global Editor’ permissions are required by the user to access the **Controlled Documents** area.

*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.*

A new draft document of the type, *‘Policy’*, which hasn’t had review or publishing settings adjusted is required for this test and the permissions above must apply in the OU where the document resides. The document created in the validation test, *“Creating Controlled Documents Validation Test v1.0”* can be used.

A review workflow and a publishing workflow are required for this test; the ones created in the validation test, *“Document Workflows Creation Validation Test v1.0”*, can be used. Though the process will show how to apply a workflow to multiple documents, it will only apply it to one to avoid creating potential problems for other users of the account. 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 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 document **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 draft document and workflows for this test reside | The dropdown list should disappear and the selected OU should display in the field |  |  |  |
|  | Click the **Status** search filter field, currently displaying the default value *‘Authorised’* | A dropdown list of document statuses available to the user should appear |  |  |  |
|  | Select the blank option to bring up all statuses | The dropdown list should disappear and the field should be empty |  |  |  |
|  | Check the list of results below | Depending on the account, OU selected and user’s permissions, a number of documents in different states should display |  |  |  |
|  | Click the checkbox on the right side of the results header area | The checkbox should appear ticked, as well as all the checkboxes next to each document listed on the page |  |  |  |
|  | Click the button, **‘+Assign Workflow’**, on the right, above the search results area | A lightbox should pop up, with the workflow type defaulting to *‘Review Workflow’*; it will display one or two messages according to the documents selected – one to report how many documents will be affected and one to identify any documents which don’t have periodic reviews set |  |  |  |
|  | Click the “X” in the top right corner of the lightbox to cancel the operation | The lightbox should close without making any changes |  |  |  |
|  | Click the checkbox on the right side of the results header area | The checkbox should appear unticked, as well as all the checkboxes next to each document listed on the page |  |  |  |
|  | Locate the draft document for this test and tick its checkbox in the left column | The checkbox should appear selected |  |  |  |
| **Assign a document review workflow to multiple documents** | Click the button, **‘+Assign Workflow’**, on the right, above the search results area | A lightbox should pop up, with the workflow type defaulting to *‘Review Workflow’*; it should display two messages – one to report that one document will be affected and one to warn that it doesn’t have periodic reviews enabled |  |  |  |
|  | Click the **‘Select Workflow’** field | A dropdown list should appear, including the review workflow for this test  |  |  |  |
|  | Select the review workflow intended for this test | The review workflow’s name should appear in the field |  |  |  |
|  | Click **Save** | The lightbox should refresh and display the message, *“Workflow assigned successfully.”* |  |  |  |
|  | Click **Close** | The lightbox should close and return you to the document **Search** tab |  |  |  |
|  | Click the row of the draft document to which the workflow was just applied; its checkbox in the left column should still be ticked | The document should open to its **General** tab; the ‘Review Settings’ button should have a yellow warning triangle over it (because periodic reviews have not been enabled) |  |  |  |
|  | Click the **‘Review Settings’** button | The ‘Manage Review Settings’ lightbox should appear |  |  |  |
|  | Tick the checkbox, **‘Require periodic review of this document’** | The checkbox should appear selected and the lightbox should expand to show more fields |  |  |  |
|  | Check the field, **‘Review Workflow:’** | It should display the name of the review workflow assigned above |  |  |  |
|  | Scroll down the lightbox | The details of the review workflow should all be listed and there should be a **Save** button in the bottom right corner |  |  |  |
|  | Click **Save** | The lightbox should close and the warning triangle over the ‘Review Settings’ button should have disappeared |  |  |  |
| **Assign a document publishing workflow to multiple documents** | Check the round blue buttons in the **General** tab of the same draft document | There should be 3 buttons to the right of the ‘Review Settings’ button: ‘Publishing Settings’, ‘Authorise Document’ and ‘Request Authorisation’ |  |  |  |
|  | Click the **Search** tab to start a fresh document search | The document **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 draft document and workflows for this test reside | The dropdown list should disappear and the selected OU should display in the field |  |  |  |
|  | Click the **Status** search filter field, currently displaying the default value *‘Authorised’* | A dropdown list of document statuses available to the user should appear |  |  |  |
|  | Select the option, ‘*Draft’*  | The dropdown list should disappear and the field should display, *‘Draft’* |  |  |  |
|  | Locate the draft document for this test and tick its checkbox in the left column | The checkbox should appear selected |  |  |  |
|  | Click the button, **‘+Assign Workflow’**, on the right, above the search results area | A lightbox should pop up, with the workflow type defaulting to *‘Review Workflow’*; it should display a messages to report that one document will be affected |  |  |  |
|  | Click the field, **‘Select Workflow Type:’** | A dropdown list of two options should appear |  |  |  |
|  | Select the option, *‘Publishing Workflow’* | The option, *‘Publishing Workflow’* should display in the field |  |  |  |
|  | Click the **‘Select Workflow’** field | A dropdown list should appear, including the publishing workflow for this test  |  |  |  |
|  | Select the publishing workflow intended for this test | The publishing workflow’s name should appear in the field |  |  |  |
|  | Click **Save** | The lightbox should refresh and display the message, *“Workflow assigned successfully.”* |  |  |  |
|  | Click **Close** | The lightbox should close and return you to the document **Search** tab |  |  |  |
|  | Click the row of the draft document to which the workflow was just applied; its checkbox in the left column should still be ticked | The document should open to its **General** tab; the **‘Authorise Document’** and **‘Request Authorisation’** buttons should have been replaced with the button, **‘Start Publishing Workflow’** |  |  |  |
| **§§§ End of Bulk Workflow Assignment** | Click the **‘Publishing Settings’** button | A lightbox should pop up to display the details of the publishing workflow assigned above |  |  |  |
|  |  |  |  |  |  |
| **Workflow Administration Settings** | Hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Settings** sub-menu item  | The **Settings** sub-menu item should be highlighted |  |  |  |
|  | Click the **Settings** sub-menu item | The **System Preferences** tab should be loaded |  |  |  |
|  | Click the **Organisational Unit Preferences** tab | The **Organisational Unit Preferences** tab should be loaded |  |  |  |
|  | Click the **‘Organisational Unit:’** field | A dropdown list of OUs available to the user should appear |  |  |  |
|  | Select the OU of the document and workflows used in this test | The dropdown list should disappear and the selected OU should display in the field |  |  |  |
|  | Click the row, **‘Document Review Settings’** | The **‘Document Review Settings’** for the OU selected should open |  |  |  |
|  | Scroll down to the section, **’Policy Review Settings’** | The section for ‘Policy Review Settings’ should be visible |  |  |  |
|  | Click the field, **‘Default Publishing Workflow for documents of type Policy in this OU’** | A dropdown list should appear, including the publishing workflow for this test |  |  |  |
|  | Select the publishing workflow intended for this test | The publishing workflow’s name should appear in the field |  |  |  |
|  | Click the field, **‘Default Review Workflow for documents of type Policy in this OU’** | A dropdown list should appear, including the review workflow for this test |  |  |  |
|  | Select the review workflow intended for this test | The review workflow’s name should appear in the field |  |  |  |
|  | Tick the preferences, **‘Lock the selected publishing workflow for Policies’** and **‘Lock the selected review workflow for Policies’** | The checkboxes for these two preferences should appear selected |  |  |  |
|  | Scroll down and click **Save** | A lightbox should pop up to ask if you are sure about this operation as it will restart any workflows underway |  |  |  |
|  | Click the **Cancel** button to abort the operation | The lightbox should disappear and you should be returned to the **‘Document Review Settings’** page |  |  |  |
| **NOTE:** These two preferences affect all existing documents (by type) in an OU and if any have workflows underway, they will be cancelled and restarted, including any change requests made. The preferences won’t be enabled in this test to avoid upsetting others’ work or creating tasks for other users of the validation account.When the preferences are enabled, users are prevented from changing the workflow selections in any documents of the given type within that OU. |
|  | Untick the preferences, **‘Lock the selected publishing workflow for Policies’** and **‘Lock the selected review workflow for Policies’** | The checkboxes for these two preferences should appear empty |  |  |  |
|  | Scroll down and click **Save** | The page should close and the **Organisational Unit Preferences** tab should be loaded |  |  |  |
| **NOTE:** To verify that new documents do get the intended workflows assigned, the test *“Creating Controlled Documents Validation Testv1.0”* can be run to the point where the draft is created. The buttons, ‘Review Settings’ and ‘Publishing Settings’ should display the appropriate workflows. |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 16th August 2021 | Document created |