**Validation Details**

This validation test covers the document owners’ facility within the controlled documents area of iPassport.

The test is designed specifically to cover assigning ownership of a controlled document and transferring ownership to another staff member within the same iPassport account. The document owners’ tool allows an owner to be specified, owners would receive notifications of their controlled documents that are due for review and have the opportunity to review the controlled document.

**Changes between iPassport versions:**

Current version: v3.4.0

Previous version: N/A

Changes to this are of iPassport: No changes, this is new to v3.4.0 of iPassport

**Pre-requisites:**

Administration access is not required for this test, but is required to check **Settings** prior to starting the test.

Check the OU settings via: **Administration** -> **Settings** -> **Organisational Unit Preferences** -> select the OU the document is in/ going to be placed in -> **Document Review Settings**. Ensure this (for the document type used) is marked at 65 (days).

This process edits an existing **draft controlled document**; to complete the validation test you need to have multiple user accounts to ensure that the ownership can be successfully transferred. You should have a draft-controlled document (a type of document has been used here) available for use and you should know the name, if you do not have one then simply create a new one prior to starting the test.

The secondary user should have fewer than 10 tasks as the validation test uses the **My Tasks** area. If the user has more than 10 then this portion of validation can be skipped.

The document is to be authorised as part of the validation process, although the full authorisation process is not specifically covered here.

Make a note of the controlled document index, as this shall be used during the validation process.

All users need to have access to the controlled document being used for the test.

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.

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 (as the primary user) | - - - - - - |  |  |  |
| 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 in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the controlled document | The search results should filter but not show your controlled document |  |  |  |
| Info. The reason for this is that the Status field is defaulted to Authorised and the document used in the test is a Draft document. If the document is displayed then it is either at Authorised status or the filter has already been adjusted. |
|  | Click the **Status** drop down field | The status options should be displayed |  |  |  |
|  | Select **Draft** from the list | The status displayed in the **Status** field should show **Draft** and the search results should be adjusted. |  |  |  |
|  | Click the line in the search results for your controlled document | The controlled document should load on the **General** tab |  |  |  |
| Document control/ management | Check the details under the **General** tab | You should see the **Document Owner(s)** field |  |  |  |
| Info. This field was introduced as part of v3.4.0 and can be seen on the left of the screen below the Document Title, the field would typically be hidden on an authorised document. |
|  | Click the pencil icon for the **Document Owner(s)** field | The field should open and display a multiple select list |  |  |  |
|  | Click in the **Filter** area | The cursor should be visible in the **Filter** field |  |  |  |
|  | Start to type the name of your alternative (secondary) user | The list should filter down and show your alternative (secondary) user |  |  |  |
|  | Select the alternative user | A tick should appear against the secondary user |  |  |  |
|  | Click **Cancel** | The field should close and display No items selected |  |  |  |
|  | Click the pencil icon for the **Document Owner(s)** field | The field should open and with your alternative (secondary) user selected |  |  |  |
|  | Click the **Save** button | The multi-select box should close and the name of the alternative user should be displayed in the **Document Owner(s)** list |  |  |  |
| Authorisation | Click the **Authorise Document** button | The authorisation lightbox should be displayed |  |  |  |
|  | If not already visible, scroll down to the **Set Next Compulsory Review for this Document**area of the lightbox | The lightbox should scroll and the area should be displayed |  |  |  |
|  | Check the info text under the **Notification List** field | It should show against the **Note** area the name of the alternative user |  |  |  |
| Info. A document owner receives notifications of controlled document reviews automatically; they no longer need to be selected at each version. They do not need to be selected again on this list either. |
|  | Click in the **Initial Version** field | The cursor should display in the field |  |  |  |
|  | Delete the “1.0” text | The text should be removed |  |  |  |
|  | Enter “2.0” (without quotes) into the **Initial Version** field | The text should be displayed |  |  |  |
|  | Click the upwards arrow in the **Set Review Frequency (months)** field  | A 1 should appear in the **Set Review Frequency (months)** field (assuming it was clicked once)  |  |  |  |
| Info. Some browsers don’t support up-down arrows in numeric fields like the **Set Review Frequency** field so they might not be available. In this case, values can just be typed in. Negative numbers, 0 or non-integers (e.g. 3.5) will be rejected upon authorisation. |
|  | Check the **Next Review Date** field | The date displayed should be one month from the date of the test |  |  |  |
|  | Click the upwards arrow in the **Set Review Frequency (months)** field again | A 2 should appear in the **Set Review Frequency (months)** field (assuming it was clicked once more) |  |  |  |
|  | Check the **Next Review Date** field | The date displayed should now be two months from the date of the test |  |  |  |
|  | Make a note of the date for use later | - - - - - - |  |  |  |
| Info. The review frequency option allows you to automatically set the review date based on the number of months required between reviews e.g. 12 for 1 year, 24 for 2 years. This can be adjusted at anytime and can be overwritten by using the review date field. |
|  | Scroll down to the **Notification List** field | The lightbox should scroll |  |  |  |
|  | Click the cursor in the **Notification List** field | The cursor should appear in the **Notification List** field and a user list should appear |  |  |  |
|  | Start to type your name (primary user) | The list should filter down and show only entries with the same character string |  |  |  |
|  | Click on your name | Your name should be added to the **Notification List** field |  |  |  |
|  | Click in any ‘white space’ in the lightbox (somewhere that does not have a select box or other user) | The **Notification List** results should be hidden |  |  |  |
|  | Scroll down to the bottom of the lightbox | The lightbox should scroll down |  |  |  |
|  | Check the bottom right | The **Authorise** button should be visible |  |  |  |
|  | Click the **Authorise** button | The document should authorise and you should be returned to the **General** tab of the record |  |  |  |
|  | Check the record heading area | The **review on** date should be displayed |  |  |  |
|  | Check the date against your noted date | This should be the same date |  |  |  |
|  | Click the **Review Settings** button | The **Review Settings** lightbox should be displayed |  |  |  |
| Info. The Review Settings was introduced as part of v3.4.0 and allows you to control the review details, specifically allowing you to adjust the reviewers’ list and the notification list for this record. It is important to note it does not allow you to review the document; this can still be done via the **Review Document** option in the drop down menu. |
|  | Check the **Next review Date** | This should be the same as the date recorded at authorisation |  |  |  |
|  | Click the downwards arrow in the **Set Review Frequency (months)** field | A 1 should appear in the **Set Review Frequency (months)** field (assuming it was clicked once) |  |  |  |
|  | Click the **Save** button | The lightbox should close and a **Review Settings Updated** message should flash across the top of the screen. You should also be returned to the **General** tab (as this is the tab from which we accessed it) |  |  |  |
|  | Check the record heading area | The **review on** date should be displayed |  |  |  |
|  | Check the date against your noted date | This should be the same date |  |  |  |
| Info. Why did the date not update? At this stage the controlled document has not been reviewed, this would have to be done via Review Document, what we have done is change the frequency so that once our current date is reached, going forward iPassport would use a frequency of 1 month to calculate the next review date. |
|  | Click the **Review Settings** button | The **Review Settings** lightbox should be displayed |  |  |  |
|  | Check the **Set Review Frequency (months)** field | This should show a 1 |  |  |  |
|  | Click the close/ x button in the top right corner of the lightbox | The lightbox should close and you should be returned to the **General** tab (as this is the tab we accessed it via) |  |  |  |
|  | Click the **Log** tab | The **Log** area should be displayed |  |  |  |
|  | Check the top entry | This should be an update performed by you (**User:** = your name) |  |  |  |
| Info. The date and time might not be the current date and time depending on the account used and the settings for that account. |
|  | Expand the top entry (down arrow on right) | The entry should expand |  |  |  |
|  | Check the details | It should read: **Review Frequency was changed from 2 to 1** |  |  |  |
|  | Click the **General** tab | The **General** tab should load |  |  |  |
|  | Click the **Click to view document details** bar (found just under the **Request Review** and **Review Settings** buttons, on the right) | The area should expand |  |  |  |
|  | Check the **Document Owner(s)** field | This should show your secondary (alternative) user |  |  |  |
| Info. It is not possible to change the document owner from here or via document correction; there is a dedicated area to do this via the **Search** tab, which should make this easier anyway. |
|  | Check the **Authorised By** field | This should display your name as you authorised the document |  |  |  |
| Controlled document search | Click the **Search** tab (above your record title) | The controlled document **Search** tab should load and display a list of authorised documents you have access to |  |  |  |
|  | Click the cursor in the **Document Owner** field | The cursor should be visible in the field |  |  |  |
|  | Start to type the name of the document owner (your secondary user) | The field should filter down to show owners with that character string |  |  |  |
|  | Click the name of the document owner from the list | The name should populate in the **Document Owners** field and the document results should filter down |  |  |  |
|  | Click the title of your controlled document (row of your document in the **Title** column) | The controlled document record should load on the **General** tab |  |  |  |
|  | Click the **back** button in the record header | You should be returned to the **Search** tab displaying your previous search results. |  |  |  |
| Transferring ownership | Click the select box to the left of the document title  | A tick should appear in the box and a new **Transfer Ownership** option should be displayed at the top of the search results |  |  |  |
|  | Click the **Transfer Ownership** button | 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 the user and your document |  |  |  |
|  | Click in the **New Owner** field | The cursor should be visible in the **New Owner** field |  |  |  |
|  | Start to type your name | The field should filter down results to the character string entered |  |  |  |
|  | Click your name | Your name should be added to 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 |  |  |  |
| Info. We are adding another owner in this instance, there is no need to create a new document version to add a new owner; it can be done from the search. It is also possible to change owners, which is covered later.  |
|  | 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. *Note: If you are going back and forth then you may need to select yourself again as the field might lose focus. This is normal.* |  |  |  |
| Info. The message simply means that a change has been made to the ownership. |
|  | Click the title of your controlled document (row of you document in the **Title** column) | The controlled document record should load on the **General** tab |  |  |  |
|  | Click the **Click to view document details** bar (found just under the **Request Review** and **Review Settings** buttons) | The area should expand |  |  |  |
|  | Check the **Document Owner(s)** field | This should now show your secondary (alternative) user and you |  |  |  |
| Controlled document search | Click the **Search** tab (above your record details) | The controlled document **Search** tab should load and display a list of authorised documents you have access to |  |  |  |
|  | Click the cursor in the **Document Owner** field | The cursor should be visible in the field |  |  |  |
|  | Start to type your name | The field should filter down to show owners with that character string |  |  |  |
|  | Click your name | Your name should populate in the **Document Owners** field and the document results should filter down |  |  |  |
|  | Check the title of your controlled document  | This should be the document you have been working on |  |  |  |
|  | Click the title of your controlled document (row of your document in the **Title** column) | The controlled document record should load on the **General** tab |  |  |  |
|  | Check the **General** tab | There should be a **For your attention…** box |  |  |  |
|  | Check the **For your attention…** box | There should be a message reading **This Document is Approaching it’s Review Date** |  |  |  |
|  | Check the **Actions** column in the **For your attention…** box | There should be two buttons: **Set** **Document as Reviewed** and **Create New Version** |  |  |  |
| Tasks | Click the **Tasks** option in the iPassport header area | The **Tasks** area should load on the **My Tasks** tab |  |  |  |
|  | Click the **Documents to Review** tab | The **Documents to Review** tab should load |  |  |  |
|  | Check the entries | The document should be listed here |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Login as the alternative user | You should be logged in |  |  |  |
|  | Click the **My Tasks** sidebar | The **My Tasks** sidebar should expand |  |  |  |
|  | Check the details listed | There should be a **Review Due** entry for your document |  |  |  |
|  | Check the index | The index should be the same as your document |  |  |  |
|  | Click the **Review Document** item in the **My Tasks** sidebar (don’t close the sidebar) | You should be taken to the controlled document on the **General** tab |  |  |  |
|  | Check the review date in the header for the controlled document | This should be the same as the **Due:** date in the **My Tasks** sidebar |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 21st July 2018 | Document created |
| V1.1 | 10th August 2018 | Info note added on page 6 (**Set Review Frequency**) – absence of up-down arrows in some browsers. |