**Validation Details**

This validation test covers how to inactivate a user and transfer their document ownership and tasks to another user in iPassport.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: v3.5.1

Changes to this area of iPassport: Additional options have been added to the User Inactivation lightbox to allow document ownership, review tasks and notifications to be transferred to a different user when a user is inactivated. This validation test also takes into account the new document review workflow feature, available from v3.5.5.

**Pre-requisites:**

Two users are required for this test. Administration access is required by one user (referred to as the primary user).

*Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required.*

This process performs change of ownership of a controlled document, making a user active/inactive and transferring tasks. To complete the validation test you need to have multiple user accounts to allow an administrator to make another user inactive and transfer their tasks to an active user. Ideally, a newly created and authorised document should be used for this exercise and initially, the owner should not be the user who will be inactivated in this test.

Ensure that both staff members have access to the same **authorised controlled document**.

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.

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, with Admin privileges) | - - - - - - |  |  |  |
| 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** field and select the ‘blank’ option from the dropdown menu | The OU field should be empty |  |  |  |
| NOTE: Selecting the blank option returns all available OUs in the search. | | | | | |
|  | 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 and show your controlled document |  |  |  |
|  | Click in the checkbox to the left of your authorised controlled document for this test | A tick should appear against the controlled document |  |  |  |
|  | Check above the header of the search results area | The **Transfer Ownership** button should appear and the message, “*1 item selected*” should display in the header |  |  |  |
| Info. The Transfer Ownership button becomes visible only to users with administration privileges. | | | | | |
| Transfer Ownership | Click the **Transfer Ownership** button | A lightbox should appear, titled, **You are about to change the owner of 1 document(s)** |  |  |  |
|  | Click in the field **New Owner** | The cursor should be visible in the field |  |  |  |
|  | Start typing the name of the secondary user (the user whose account will be made inactive) | Names that match the string you type should start appearing, listed below the field |  |  |  |
|  | Click on the name of the secondary user when it appears in the filtered list | The secondary user’s name should appear in the field under **New Owner** |  |  |  |
|  | Select “**Replace the current owner list with this single new owner**” from the two options available | The option “**Replace the current owner list with this single new owner**” should appear selected/checked |  |  |  |
|  | Click on **Update Owner** | The lightbox should close and return you to the controlled document Search tab |  |  |  |
|  | Check the area above of the Search tab | The message, “Successfully transferred ownership on 1 document(s)” should briefly appear in green |  |  |  |
|  | Click in the search field **Document Owner** | The cursor should be visible inside the field marked **Document Owner** |  |  |  |
|  | Start typing the name of the primary user (currently logged in) | Names that match the string you type should start appearing, listed below the field |  |  |  |
|  | Select the name of the primary user from the options offered | The primary user’s name should appear in the field under **Document Owner** |  |  |  |
|  | Check the Search results below | Any authorised controlled documents that are owned by the primary user should be listed |  |  |  |
|  | Check the list of the search result | The authorised controlled document should **not** appear on the list |  |  |  |
|  | Delete the name in the search field **Document Owner** | Only the cursor should be visible inside the field marked **Document Owner** |  |  |  |
|  | Start typing the name of the secondary user | Names that match the string you type should start appearing, listed below the field |  |  |  |
|  | Select the name of the secondary user from the options offered | The secondary user’s name should appear in the field under **Document Owner** |  |  |  |
|  | Check the Search results | Any authorised controlled documents that are owned by the secondary user should be listed |  |  |  |
|  | Check the list of the search result | The re-assigned authorised controlled document should appear on the list |  |  |  |
|  | Click in the row of the authorised controlled document for this test | The controlled document should load on the **General** tab |  |  |  |
| Review Settings | Click the **Review Settings** button | The Review Settings lightbox should be displayed |  |  |  |
|  | Tick the checkbox marked, “*Require periodic review of this document*” | If not already ticked, the lightbox will expand |  |  |  |
| Document Review Workflows | Ensure the option, ‘*Custom Workflow’* is selected in the field, ‘**Review Workflow**’ | The option, ‘*Custom Workflow’* should display in the field, ‘**Review Workflow**’ |  |  |  |
|  | Click the **‘Edit Workflow’** button | The **‘Edit Workflow’** button should be replaced with **Save/Cancel** buttons |  |  |  |
|  | If the workflow has any review rounds (Round 1, Round 2, …) or an Approval Step, click the trash/bin icon in each item to delete it | The workflow section should only have a **‘(+)Review Round’** button, a **‘Complete Review Cycle’** box and an **‘(+)Approval Step’** button |  |  |  |
|  | Click the **‘(+)Review Round’** button | A box titled**, ‘Round 1’** should appear, containing an empty field and the condition field, ‘*Proceed to the next step when…*’ |  |  |  |
|  | Start typing the name of the secondary user (new owner of this document) in the empty field | Names which match the text entered will start to appear in a dropdown list |  |  |  |
|  | Select the name of the secondary user | The dropdown list should disappear and the name should display in the field with an “x” next to it |  |  |  |
|  | Click the **‘(+)Approval Step’** button | A box titled, **‘Approval Step’** should appear, containing an empty field titled, *‘Sign-off required by one of:’* |  |  |  |
|  | Start typing the name of the secondary user (new owner of this document) in this field as well | Names which match the text entered will start to appear in a dropdown list |  |  |  |
|  | Select the name of the secondary user | The dropdown list should disappear and the name should display in the field with an “x” next to it |  |  |  |
|  | Click the ‘**Create’** button in the bottom right corner of the lightbox |  |  |  |  |
|  | Click the bar marked, “Click to view document details” | The area should expand and the name of the secondary user should appear under, *Document Owner(s)* in the left column |  |  |  |
|  | Click the same bar now marked, “Click to hide details” | The area should collapse to hide the details |  |  |  |
| Inactivate User and Transfer Tasks | Hover over the **Administration** main menu item | The **Administration** sub-menu should appear |  |  |  |
|  | Hover over the **Users** sub-menu item | The **User** sub-menu item should be highlighted |  |  |  |
|  | Click on the **User** sub-menu item | The **Search Users** tab should be loaded |  |  |  |
|  | Click the **Home** **OU** field and select the ‘blank’ option from the dropdown menu | The **Home OU** field should be empty |  |  |  |
|  | Click in the **Search Users** field | The cursor should be available in the **Search Users** field |  |  |  |
|  | Start typing the name of the secondary user | The results under “**Users matching the term --**”, should filter down to match your string |  |  |  |
|  | Click in the row of the secondary user’s name when it appears | The secondary user’s profile should load on the **General** tab |  |  |  |
|  | From the **Actions** dropdown menu select **Set as Inactive** | The option **Set as Inactive** should appear in the field |  |  |  |
|  | Click **Go** | The lightbox **Inactivate <Secondary user’s Name>** should pop up |  |  |  |
| NOTE: Depending on the user’s previous activity, there will be different items which can be transferred to other users. This test focuses on document ownership and participation in review cycles. | | | | | |
| Assign new document reviewer | Scroll down and click the checkbox under the option starting with the secondary user’s name, “**Name** is listed on **X** document(s) as a reviewer.” | An empty field should appear under the checkbox, in place of the text, “Select New Notifier” |  |  |  |
|  | Click in the blank field | The cursor should be available in the field |  |  |  |
|  | Start typing the name of the primary user (currently logged in) | A dropdown list of users should appear and it should filter down to the names that match the string you type |  |  |  |
|  | Select the name of the primary user | The primary user’s name should be displayed in the field; the dropdown list should disappear |  |  |  |
| Assign new document owner | Scroll down and click the checkbox under the option starting with the secondary user’s name, “**Name** is an owner of X document(s).” | The selection filter for **Select New User** should be replaced with an empty field |  |  |  |
|  | Click in the emptyfield | The cursor should be available in the field |  |  |  |
|  | Start typing the name of the primary user | A dropdown list of users should appear and it should filter down to the names that match the string you type |  |  |  |
|  | Select the name of the primary user | The primary user’s name should be displayed in the field; the dropdown list should disappear |  |  |  |
| Assign new document review approver | Scroll down and click the checkbox under the option starting with the secondary user’s name, “**Name** is set as a review approver for 1 review workflows.” | The text, **Select New Reviewer** should be replaced with an empty field |  |  |  |
|  | Click in the blank field | The cursor should be available in the field |  |  |  |
|  | Start typing the name of the primary user | A dropdown list of users should appear and it should filter down to the names that match the string you type |  |  |  |
|  | Select the name of the primary user | The primary user’s name should be displayed in the field; the dropdown list should disappear |  |  |  |
|  | Scroll down and click the **Inactivate user** button - bottom right of lightbox | The secondary user’s profile should load on the **General** tab; the heading should say, **Inactive: <*secondary user’s name*>** in red |  |  |  |
| Reactivate User | From the **Actions** dropdown menu select **Set as Active** | The option **Set as Active** should appear in the field |  |  |  |
|  | Click **Go** | The lightbox **Reactivate <Secondary user’s Name> (Inactive)** should pop up |  |  |  |
|  | Click the **Reactivate user** button - bottom right of lightbox | The secondary user’s profile should load on the **General** tab; the heading should say, **Active: <*secondary user’s name*>** in blue |  |  |  |
| 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 **Document Owner** | The cursor should be visible inside the field marked **Document Owner** |  |  |  |
|  | Start typing the name of the secondary user | Names that match the string you type should start appearing, listed below the field |  |  |  |
|  | Select the name of the secondary user from the options offered | The secondary user’s name should appear in the field under **Document Owner** |  |  |  |
|  | Check the list of the search result | The authorised controlled document should **not** appear on the list |  |  |  |
|  | Click in the search field **Document Owner** and clear the text here | The cursor should be visible inside the field marked **Document Owner** |  |  |  |
|  | Start typing the name of the primary user | Names that match the string you type should start appearing, listed below the field |  |  |  |
|  | Select the name of the primary user from the options offered | The primary user’s name should appear in the field under **Document Owner** |  |  |  |
|  | Check the list of the search result | The authorised controlled document should appear on the list |  |  |  |
|  | Click in the row of the authorised controlled document for this test | The controlled document should load on the **General** tab |  |  |  |
| Review Settings | Click the **Review Settings** button | The Review Settings lightbox should be displayed |  |  |  |
|  | Check the name in the box, **Review Round 1** | The primary user’s name should appear in the field |  |  |  |
|  | Check the name in the box, **Approval Step** | The primary user’s name should appear in the field |  |  |  |
|  | Click the “x” on the top right of the lightbox | You should be returned to the **General** tab area of the controlled document |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 23rd July 2018 | Document created |
| v1.1 | 10th Jan 2020 | Document updated to match current interface |
| v1.2 | 24th Jan 2021 | Document updated to iPassport v3.6.0 |