**Validation Details**

This validation test covers the PIN & Signature function within iPassport, this feature is designed to allow a further point of user authentication when authorising a controlled document.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: v3.5.4

Changes to this area of iPassport:

Some changes have occurred to this area of iPassport as a result of the introduction of the Review Settings area, this includes the compulsory review select area.

**Pre-requisites:**

You’ll need to have a user that has administrator access to the system.

You’ll need to have two controlled documents in a draft form on the system that have not been previously authorised, this validation test uses a controlled document type of **Document**, but this is not essential, if using another type simply substitute the appropriate entries. Ensure if using a different document type you select the appropriate PIN option in **Settings**. These controlled documents should be in different OUs on the system. Make a note of the documents and which OU each of them is stored in.

Ensure the setting of “**Include Authorisation Sheet**” is selected in the **Printing Settings** in the **Document Control** preference area, this should be selected by default.

You need to have a scanned/ picture image of a signature in an image format

Documents used should be in a PDF format if using the validation account as these items are to be printed.

This validation document can be completed in the validation, training and live environment, if completing in the live environment then you may wish to delete the records after this.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| Login | Log into iPassport | You should be logged into iPassport |  |  |  |
| Navigation | Hover over the **Administration** menu | The sub-menu should be displayed |  |  |  |
|  | Scroll down and hover over **Settings** | The **Settings** item should be highlighted |  |  |  |
|  | Click the **Settings** item | The **System Preferences** tab should load |  |  |  |
|  | Click the **Organisational Unit Preferences** tab | The **Organisational Unit Preferences** tab should be displayed |  |  |  |
|  | Click the **Organisational Units** drop down | The **Organisational Units** drop down should expand and list the OUs you have access to  *Note: This should be at least two for this test, see pre-requisites.* |  |  |  |
|  | Select your primary OU from the drop down list | The OU should be displayed in the **Organisational Units** field |  |  |  |
|  | Hover over the **Document Control** option | This should be highlighted |  |  |  |
| Settings | Click the **Document Control** row | The **Document Control for** *OU* screen should be displayed |  |  |  |
|  | **1** Check the **Authorisation Settings** area | You should see **PIN and Signature required for authorising …** displayed |  |  |  |
|  | Select the option for the controlled document type being used (select the **PIN and Signature required for authorising Documents**) | The item should be selected |  |  |  |
|  | Click the **Save** button | You should be returned to the **Organisational Unit Preferences** tab |  |  |  |
| Setting a PIN | Click the **My Profile** option on the left of the screen | The **User Details** tab should load |  |  |  |
|  | Click the Change Password or PIN tab | The **Change Password or PIN** tab should load |  |  |  |
|  | Click in the **Pin** field | The cursor should be visible in the field |  |  |  |
|  | Enter the Pin 321 | \*\*\* should be visible in the field |  |  |  |
|  | Click in the **PIN Confirmation** field | The cursor should be visible in the field |  |  |  |
|  | Enter the Pin 321 | \*\*\* should be visible in the field |  |  |  |
|  | Click the **Change Pin** button | A warning message should be displayed **Pin is too short (minimum is 4 characters)** |  |  |  |
|  | Click the Change Password or PIN tab | The tab should refresh and the PIN fields should be empty |  |  |  |
|  | Click in the **Pin** field | The cursor should be visible in the field |  |  |  |
|  | Enter the Pin 4321 | \*\*\*\* should be visible in the field |  |  |  |
|  | Click in the **PIN Confirmation** field | The cursor should be visible in the field |  |  |  |
|  | Enter the Pin 1234 | \*\*\*\* should be visible in the field |  |  |  |
|  | Click the **Change Pin** button | A warning message should be displayed **Pin confirmation doesn’t match Pin** |  |  |  |
|  | Click in the **PIN Confirmation** field | The cursor should be visible in the field |  |  |  |
|  | **2** Delete the previous PIN | The pin should be removed |  |  |  |
|  | Enter the Pin 4321 | \*\*\*\* should be visible in the field |  |  |  |
|  | Click the **Change Pin** button | A confirmation message should be displayed **Pin Changed** and the **Pin** and **Pin Confirmation** fields should be empty |  |  |  |
| Adding a signature | Hover over the **Administration** main menu item | The sub-menu should be displayed |  |  |  |
|  | Scroll down and hover over **Users** | The **Users** item should be highlighted |  |  |  |
|  | Click the **Users** item | The **Search Users** tab should load |  |  |  |
|  | Search for your user record (**3** you may need to adjust the Home OU for this) | - - - - - |  |  |  |
|  | Click your name in the **Name** column | Your user record should open on the **General** tab |  |  |  |
|  | Click the **Signature** tab | The **Signature** tab should load |  |  |  |
|  | Click the **Click here to upload a new signature** box | A browse/ search/ finder item should open from your computer and display possible files |  |  |  |
|  | Use the browse/ search/ finder item to locate your signature image file | Click the image and add you should then be returned to the **Signature** tab  *Note: This process may vary depending on your local system* |  |  |  |
|  | Check the **Signature** tab | You should now see a **User Password** field and a Save button |  |  |  |
|  | Click the **Save** button | A warning message should be displayed informing you **Please enter your iPassport password to save the new signature** |  |  |  |
|  | Click in the **User Password** field | The cursor should be visible in the field |  |  |  |
|  | Enter your password | You should see \*\*\*\*\*\*\* in the field |  |  |  |
|  | Click the **Save** button | The new signature should be displayed in the **Current Signature** area |  |  |  |
| Authorising a controlled document | Hover over the **Laboratory Records** main menu item | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Controlled Documents** sub-menu | The sub-menu item should be highlighted |  |  |  |
|  | Click the **Controlled Documents** sub-menu item | The controlled documents **Search** tab should be displayed |  |  |  |
|  | Click the **OU** drop down | The **OU** drop down should expand |  |  |  |
|  | Select the OU used to adjust the settings earlier | The OU text should be visible in the field and the search results should filter down |  |  |  |
|  | Click the **Status** drop down field | The status menu should expand |  |  |  |
|  | Select the **Draft** option | The **Draft** option should be displayed in the field and the search results should filter down |  |  |  |
|  | Locate your controlled document | - - - - - |  |  |  |
|  | Hover over the name of the controlled document | The row should be highlighted |  |  |  |
|  | Click the name of the controlled document in the **Title** column | The controlled document should load on the **General** tab |  |  |  |
|  | Click the **Actions** drop down menu | The actions should be visible |  |  |  |
|  | Select **Authorise** | The **Authorise** option should be visible in the field |  |  |  |
|  | **4** Click the **Go** button | The Authorise lightbox should be displayed |  |  |  |
|  | Check the **Authorise** lightbox | The first entry should be the **PIN** field |  |  |  |
|  | Check the **Initial Version** field | This should show **1.0** |  |  |  |
|  | Click the **Authorise** button (you may need to scroll down for this) | An information message should display informing you to add a PIN |  |  |  |
|  | Add 1234 to the **PIN** field | The field should show \*\*\*\* |  |  |  |
|  | Click the **Authorise** button | A warming message should be displayed **Your PIN number is incorrect** |  |  |  |
|  | Click in the **PIN** field | The cursor should be visible in the field |  |  |  |
|  | Select the **\*\*\*\*** text | - - - - - |  |  |  |
|  | Delete the selected text | The text should be removed from the **PIN** field |  |  |  |
|  | Enter 4321 into the **PIN** field | The field should show \*\*\*\* |  |  |  |
|  | Click the **Authorise** button | The document should be authorised and you should be returned to the **General** tab |  |  |  |
| Printing signature | Click the **Controlled Print** button on the **General** tab | The **Print Controlled Document** lightbox should be displayed |  |  |  |
|  | **6** Check the print select fields | The **Include Authorisation Sheet** field should be selected |  |  |  |
|  | Click the **Print** button | An information message should be displayed informing you a reason is required (please fill in this field) |  |  |  |
|  | Click in the **Reason** field | The cursor should be visible in the **Reason** field |  |  |  |
|  | Enter the reason ‘to print’ | The text should be visible in the field |  |  |  |
|  | Click the **Print** button | The PDF icon for the print should be displayed |  |  |  |
|  | Click the PDF icon | The file should download and the lightbox should update to show that the file has been downloaded  **7** *Note: The PDF may open in a new tab depending on local settings* |  |  |  |
|  | Go to your download area  *Note: This can vary depending on the local system* | - - - - - |  |  |  |
|  | Open the PDF | The PDF should open  *Note: where this open is dependent on the local system and is therefore not part of this validation test* |  |  |  |
|  | Scroll down to the end of the PDF | There should be an **Appendix** area |  |  |  |
|  | Check the **Appendix** area | There should be an **Authorisation** entry which displays a copy of the signature stored in the user account for you |  |  |  |
|  | Return to iPassport if outside the system | - - - - - |  |  |  |
|  | Close the **Print Controlled Document** lightbox using the x icon in the top right corner | The **Print Controlled Document** lightbox should close |  |  |  |
|  | Click the **Search** tab | The **Search** tab should be displayed |  |  |  |
|  | Click the **OU** drop down | The **OU** drop down should expand |  |  |  |
|  | Select the OU not used to adjust the settings earlier (your alternative OU) | The OU text should be visible in the field and the search results should filter down |  |  |  |
|  | Click the **Status** drop down field | The status menu should expand |  |  |  |
|  | Select the **Draft** option | The **Draft** option should be displayed in the field and the search results should filter down |  |  |  |
|  | Locate your controlled document | - - - - - |  |  |  |
|  | Hover over the name of the controlled document | The row should be highlighted |  |  |  |
|  | Click the name of the controlled document in the **Title** column | The controlled document should load on the **General** tab |  |  |  |
|  | Click the **Actions** drop down menu | The actions should be visible |  |  |  |
|  | Select **Authorise** | The **Authorise** option should be visible in the field |  |  |  |
|  | Check the **Authorise** lightbox | You should not be able to see a PIN option |  |  |  |

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| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 16th June 2020 | Document created |
| v1.1 | 18th August 2021 | 1 – Changed the area of the setting  2 – Added a row to ensure previous PIN is deleted  3 – Added Home OU reference  4 – Added the row to provide confirmation step  5 – Not Listed – Removed the compulsory review field reference (2 rows) as this has changed with the introduction of the Review Settings function  6 – Added the row to ensure the print preference is selected  7 – Added a local system note |