**Validation Details**

This validation test covers settings available to manage controlled document printing in *iPassport*. It is intended for administrators with access to the Organisational Unit Preferences of their OU. Available options are explored for controlled prints, including setting ‘Locations’ for printed copies which need to be tracked and destroyed eventually.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of *iPassport*: Locations now require the tag, ‘Print’ to be available when assigning a location to a print. ‘Organisational Unit Preferences’ have been added to the ‘Document Control’ section to allow setting defaults for frequently used fields.

**Pre-requisites:**

Administration access and ‘Global Editor’ privileges are required by the user running this test. No additional users are required. The permissions must be available in an OU where the user has access to authorised documents as well as its **Administration > Settings > Organisational Unit Preferences** area.

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

At least one authorised document needs to have a Word, PDF or RTF source document so that the system can produce PDF prints.

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.

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.**

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  | Log into *iPassport* (as the primary user, with Admin privileges) | - - - - - - |  |  |  |
| Menu | 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 settings’ **System Preferences** tab should be loaded |  |  |  |
| Organisational Unit Preferences | Click in the **Organisational Unit Preferences** tab | The screen should refresh to display the **Organisational Unit Preferences** tab |  |  |  |
|  | Click the field, **Organisational Unit** | A dropdown list of all available OUs should appear |  |  |  |
|  | Select the OU of interest (please see pre-requisites above) | The dropdown list should collapse and the selected OU’s name should display in the field |  |  |  |
|  | Hover over the row named, **“Document Control”** | The row should appear highlighted in grey |  |  |  |
|  | Click the **“Document Control”** row | The page, *“Document Control for <selected OU>”* should load |  |  |  |
| Print Defaults (authorisation sheet, appendix, cover page & intro) | Un-tick the checkboxes for the preferences,   * *"Include Authorisation Sheet" selected by default* * *"Print Appendix" selected by default* * *"Print Cover Page" selected by default*   and   * *"Print Introduction/Scope as separate page" selected by default* | The checkboxes should be empty, un-selected |  |  |  |
| Allow uncontrolled prints | Scroll down to locate the preference, *“Allow uncontrolled prints of Documents”* | A checkbox should show to the left of the preference |  |  |  |
|  | Ensure the checkbox for *“Allow uncontrolled prints of Documents”* is ticked | The checkbox should be clearly marked as selected |  |  |  |
|  | Scroll down and click **Save** | The screen should return to display the **Organisational Unit Preferences** tab |  |  |  |
| §§§ End of Settings |  |  |  |  |  |
| NOTE: The following section runs through creating a **‘Location’** and making it available for prints by adding a *‘Print’* tag to it. | | | | | |
| §§§ |  |  |  |  |  |
|  | Hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **[+]** sign, right of the **Locations** sub-menu item | The **[+]** sign item should be highlighted |  |  |  |
|  | Click the **[+]** sign | The **New Location** tab should be loaded |  |  |  |
| NOTE: Some users in ‘enterprise’ accounts (which have facilities) will see a field to select in which facility the location should be added. | | | | | |
|  | Click the field, **‘Short Name’** and enter a name for a print location (e.g., “*Cyto Desk 1*”) | The name entered should display in the field |  |  |  |
|  | Click the field, **‘Long Name’** and enter a name for a print location (e.g., “*Cytogenetics Desk 1*”; the same name can be entered in both fields) | The name entered should display in the field |  |  |  |
|  | Scroll down to the **OUs & Tags** section and click the word, “*Filter*” in the **Organisational Units** search filter | The cursor should be visible in the field |  |  |  |
|  | Start to type the name of the OU which is being used in this test until it appears listed below | The OU list should narrow down as text is entered until the desired OU is visible |  |  |  |
|  | Tick the checkbox of the OU in reference | A tick should be visible in the checkbox of the selected OU |  |  |  |
|  | Tick the checkbox of the tag, “*Print*” in the **Tags** search filter | A tick should be visible in the checkbox of the ‘*Print’* tag |  |  |  |
|  | Click the **Create Location** button | The new location record should open to its **General** tab |  |  |  |
| §§§ End of Locations |  |  |  |  |  |
| NOTE: Locations have several uses and information can be added to the location created above later. This test only covers their use in prints. | | | | | |
| §§§ |  |  |  |  |  |
| Search Controlled Documents | 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 the **OU** field and select the same OU where the settings were just adjusted | The OU name should be displayed in the field |  |  |  |
|  | Ensure the field, **Status** displays the option, *Authorised* | Only ‘*Authorised*’ or ‘*Under Review*’ documents should be listed below |  |  |  |
|  | Click the **Document Type** field and select the option, *‘Document’* | Only documents of the type, *‘Document’* should be displayed below |  |  |  |
|  | Search for or locate in the results below, an authorised document which displays a PDF icon in the **Actions** column | If no document is available with a PDF icon in the **Actions** column, please refer to the pre-requisites above |  |  |  |
| NOTE: A PDF icon in the **Actions** column indicates the document is available in PDF format and can be previewed. Unless it is an External Document, the absence of the icon implies the source document has a different format (for example, .XLSX) and can’t be converted to PDF by the system. | | | | | |
|  | Click the row of the selected document | The **General** tab of the selected document should load |  |  |  |
|  | Click the “**Actions**” field near the top right of the document record | A dropdown menu of options should appear |  |  |  |
|  | Select, *Print Document* | The dropdown menu should disappear and the option, “*Print Document*” should be displayed in the field |  |  |  |
|  | Click, **Go** | The **Print Controlled Document** lightbox for the current document should appear |  |  |  |
|  | Confirm the option, “**This print should be controlled**” is enabled | The checkbox should be ticked |  |  |  |
|  | Click the ‘**Location’** field | A dropdown menu of available locations should appear |  |  |  |
|  | Select the location just created | The new location should display in the field |  |  |  |
|  | Confirm the options,   * *Print cover page*, * *Print introduction/scope as separate page*,   and   * *Print appendix*   are not enabled | The checkboxes should be empty, un-selected |  |  |  |
|  | Click the **Print** button | A warning should appear pointing at the **‘Reason’** field with the message, “*Please fill in this box*” |  |  |  |
|  | Enter some text in the field, **Reason** and click “**Print**” | A new lightbox should load with a PDF icon and the message, “*Click the icon above and wait for the document to download”* |  |  |  |
|  | Click the PDF icon | The file should be downloaded and the message, “*File downloaded*” should display under a tick mark |  |  |  |
|  | Click the “**X**” in the top right corner of the lightbox to close it | The screen should return to the document’s **General** tab |  |  |  |
| Print History | Click the “**Actions**” field near the top right of the document record | A dropdown menu of options should appear |  |  |  |
|  | Select, *Print History* | The dropdown menu should disappear and the option, “*Print History*” should be displayed in the field |  |  |  |
|  | Click, **Go** | The **Print History** lightbox for the current document should appear |  |  |  |
|  | Check the items in the print history list | The controlled print which was just performed should appear at the bottom of the list |  |  |  |
|  | Click the down-arrow on the right of the first item on the list (the print just generated) | The area should expand to provide more detail, including the location, the ‘reason’ entered above and the status (*In Circulation*) |  |  |  |
|  | Click the trash/bin icon on the right (next to the now up-arrow) | The area should expand to present a comments field and the button, **‘Mark Destroyed’** |  |  |  |
|  | Click the **‘Mark Destroyed’** button | A warning should appear pointing at the **‘Destroy Confirmation’** field with the message, “*Please fill in this field*” |  |  |  |
|  | Enter a comment in the field, **‘Destroy Confirmation’** | The text entered should display in the field |  |  |  |
|  | Click the **‘Mark Destroyed’** button again | The lightbox should refresh and the trash/bin icon should have disappeared |  |  |  |
|  | Click the down-arrow of the same print record | The area should expand to provide additional details - the person, date and comment entered; the status should have changed to (*Destroyed*) |  |  |  |
|  | Click the “**X**” in the top right corner of the lightbox to close it | The screen should return to the document’s **General** tab |  |  |  |

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| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 22nd January 2021 | Document created |