**Validation Details**

This validation test covers settings available to manage uncontrolled document printing in *iPassport*. It is intended for administrators with access to the Organisational Unit Preferences of their OU. Two printing options are covered:

* Download Document Preview (uncontrolled print of Word/PDF/RTF files)
* Download other files (like .xlsx)

In each case the available options are explored.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of *iPassport*: ‘Organisational Unit Preferences’ have been added to the ‘Document Control’ section to allow setting defaults for frequently used fields and make it quicker to print/download documents.

**Pre-requisites:**

Administration access and ‘Global Editor’ privileges are required in an OU where the user has access to two authorised documents, one which has a PDF as its source document and the other which can have an Excel file (non-Word, non-PDF) as its source document. The document with an Excel source file should be of the type ‘*Document’* to follow this test more easily. No additional users are required.

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

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 |  |  |  |
| Disable Preview Printing | Scroll down to locate the preference, *“Disable Preview printing”* | A checkbox should show to the left of the preference |  |  |  |
|  | Ensure the checkbox for *“Disable Preview printing”* is ticked  | The checkbox should be clearly marked as selected |  |  |  |
| NOTE: The preference, *“Disable Preview printing”* stillallows downloading an uncontrolled PDF copy but printing it should be password protected; the password is unavailable. |
|  | Scroll down and click **Save** | The screen should return to display the **Organisational Unit Preferences** tab |  |  |  |
| Search Controlled Document | 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 in 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 |  |  |  |
|  | Search for the document of interest 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 indicates 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 bar marked, *“Click to view document details”* (if already clicked, the bar will show, *“Click to hide details”*) | The area should expand to show metadata of the document and the link, “**Download Document Preview**” |  |  |  |
| Download Document Preview | Click “**Download Document Preview**” | A lightbox should appear and once loaded, the message, “*Click on the icon above to download the preview*” should display under a PDF icon |  |  |  |
|  | 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 |  |  |  |
|  | Open the downloaded file in another browser tab or in an appropriate software to view PDFs | The PDF file should open normally |  |  |  |
| Print prevented | Try to print the downloaded document | The ‘Print’ command should either be inaccessible (greyed out) or a password should be requested to allow the operation, depending on which browser/app is used |  |  |  |
| §§§ End of section |  |  |  |  |  |
| NOTE: The steps above can be repeated, leaving the option (“*Disable Preview printing*”) unticked to verify that prints can be made. |
| §§§ |  |  |  |  |  |
| Menu | Hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | 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 same OU as above | The dropdown list should collapse and the selected OU’s name should display in the field |  |  |  |
|  | Click the **“Document Control”** row | The page, *“Document Control for <selected OU>”* should load |  |  |  |
| 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 un-ticked  | The checkbox should be empty, un-selected |  |  |  |
|  | Scroll down and click **Save** | The screen should return to display the **Organisational Unit Preferences** tab |  |  |  |
| Search Controlled Document | 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 in 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 field, **“Document Type”** | A dropdown list of document types should appear |  |  |  |
|  | Select the type, “*Document*” from the dropdown list | The list should disappear and the type, “*Document*” should display in the field |  |  |  |
|  | Search for or locate in the list the document which has an Excel source file and doesn’t display a PDF icon in the **Actions** column | If no document is available without a PDF icon in the **Actions** column, please refer to the pre-requisites above  |  |  |  |
|  | Click the row of the document to open it | The **General** tab of the selected document should load; a message box under the document title should display – *‘No Preview Available - please click here to download this document’* |  |  |  |
| Uncontrolled file download (non-Word, non-PDF) | Scroll down to find a box with the link, “Please click here to download the Document” | In place of a document preview, there should be a box with the link to download it under the message, “*Sorry, preview is unavailable for this Document.”* |  |  |  |
|  | Click the link “Please click here to download the Document” | A lightbox should appear |  |  |  |
|  | Notice the absence of a checkbox for the option, “*This download should be controlled?”*  | Neither the checkbox nor the option, “*This download should be controlled?”* should be visible |  |  |  |
| NOTE: This option is governed by the OU Preference, *“Allow uncontrolled prints of Documents”*. There is one of these preferences for each type of document; if disabled, the only option is to produce controlled downloads (with a print identifier tracked by *iPassport* and visible in ‘Print History’). |
|  | Click the “**X**” in the top right corner of the lightbox to close it | The screen should return to the document’s **General** tab |  |  |  |
| Menu | Hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | 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 same OU as last time | The dropdown list should collapse and the selected OU’s name should display in the field |  |  |  |
|  | Click the **“Document Control”** row | The page, *“Document Control for <selected OU>”* should load |  |  |  |
| 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 this time | The checkbox should be clearly marked as selected |  |  |  |
| Controlled Print Flag by Default | Scroll to the preference, “*Enable Controlled Print Flag by Default When Downloading Files Without a Preview*” and tick its checkbox | The checkbox should be clearly marked as selected |  |  |  |
| Require a reason for uncontrolled downloads | Scroll to the preference, “*Require a reason for uncontrolled file downloads*” and tick its checkbox | The checkbox should be clearly marked as selected |  |  |  |
|  | Scroll down and click **Save** | The screen should return to display the **Organisational Unit Preferences** tab |  |  |  |
| History sidebar | Click the **History** icon in the left sidebar menu | The sidebar should expand to show the recent history of pages visited |  |  |  |
|  | Click the item for the document last visited, the one with an Excel source file | The **General** tab of the selected document should load |  |  |  |
| Uncontrolled download | Click the link “No Preview Available - please click here to download this Document” | A lightbox should appear |  |  |  |
|  | Notice the checkbox for the option, “*This download should be controlled?”*  | A checkbox under the option, “*This download should be controlled?”* should be visible and ticked |  |  |  |
|  | Un-tick the checkbox for the option, “*This download should be controlled?”* | The checkbox should be empty, un-selected |  |  |  |
|  | Click the button, “**Continue**” | A warning should appear pointing at the **‘Reason’** field with the message, “*Please fill in this field*” |  |  |  |
|  | Enter a comment in the field, **Reason** and click “**Continue**” | A new lightbox should load with a down-arrow icon and the message, “*Your document is ready to download, click the icon to download it.”* |  |  |  |
|  | Click the down-arrow icon to download the document | The browser should perform the download |  |  |  |
|  | 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 uncontrolled print which was just performed should appear at the bottom of the list |  |  |  |
|  | Click the down-arrow on the right of the last item on the list (the file just downloaded) | The area should expand to provide more detail, including the ‘reason’ entered above |  |  |  |
|  | 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 |