**Validation Details**

This validation test covers publishing draft controlled documents in ***iPassport*** using publishing workflows.

The test is designed specifically to cover the process of starting a publishing workflow and following the steps to release the document for circulation.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: ‘review’ and ‘change request’ validation tests were released with v3.4.0. Since then, major changes have been made in the process and this test is the last part of a series of 4 validation tests which cover the revisioning process of a controlled document.

Changes to this area of iPassport: the addition of publishing workflows allows designing a cascade of authorisations and a streamlined process for directors to sign them off.

**Pre-requisites:**

Administration access is not required for this test. Permission to authorise documents is required by multiple users. The primary user should have ‘Global Editor’ permissions and be the owner of the document used for this test. Three additional users are required who can authorise the type of document used for the test and view it in draft state. System ‘Global Editor’ roles carry these permissions. The primary user requires access to these accounts to complete the test; all users should have access to the test document.

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

 *Emails are not delivered from the Validation account to prevent confusion with production account emails.*

Depending on the location of the account, the document record menu tab, **Reviews**, might be named, **Feedback**; it will be referred to as **Reviews** throughout this exercise.

This process uses an existing **controlled document** in **draft** state and it should have review and publishing workflows in place. The document from the previous validation test, *“Implementing\_Change\_Requests\_validation\_v1.0”* can be used. If the series of validation tests has been followed in order, this document should have review and publishing workflows in place and be ready for publishing.

*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.*

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 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 the **OU** search filter field | A dropdown list of OUs available to the user should appear |  |  |  |
|  | Select the OU where the document and workflows for this test reside | The dropdown list should disappear and the selected OU should display in the field |  |  |  |
|  | Click the **Status** search filter field | A dropdown list of document statuses available to the user should appear |  |  |  |
|  | Select the option *‘Draft’* | The dropdown list should disappear and the selected option should display in the field |  |  |  |
|  | Click in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the controlled document intended for this test | The search results should filter and show your controlled document |  |  |  |
|  | Click the line of your controlled document in the search results | The controlled document should load on the **General** tab |  |  |  |
| Publishing Settings | Click the round blue button, **‘Publishing Settings’** | A lightbox should open to display the publishing workflow assigned to this document in a previous validation test |  |  |  |
| NOTE: If the document doesn’t have a publishing workflow assigned, you need to assign one to continue this test. Another validation test in this series provides the steps to create one, either as a custom workflow within the document or from the central Workflows module in the administration area. It should include one authorisation round with two users (both required to authorise) and one approval step with one user. |
|  | After confirming a publishing workflow is in place, click the **‘X’** in the top right corner of the lightbox | The lightbox should close and you should be returned to the **General** tab of the document |  |  |  |
|  | Click the button, **‘Start Publishing Workflow’**; it appears in two places – in the ‘Changes Requested’ box of the workflow summary and in the row of round blue buttons below | The **‘Start Publishing Workflow’** lightbox should appear |  |  |  |
|  | If the field, **‘Document Revision’** is empty, click it | If the field is not empty, skip the next step; if it is, a dropdown list of two options should appear |  |  |  |
| INFO: There is an option in the **Administration > Settings > OU Preferences > Document Control** pages which allows you to *‘Use Major and Minor Document Versioning’* for any given OU; when it’s disabled, only major revisions are allowed. |
|  | Select the option, *‘Major Revision’* | The option *‘Major Revision’* should display in the field |  |  |  |
|  | If the field, **‘Outstanding review tasks exist…’** is visible, click the field and enter a comment | If the field is present, the text entered should display in it; if not, ignore this step |  |  |  |
| INFO: If the document used in this test has followed the previous validation tests of this series, it will still have a pending review feedback task. Even though the review workflow stated, *‘Proceed to next step when at least one person has completed their task’*, other tasks are left open to allow all collaborators to participate if they wish. Once the publishing workflow is started, incomplete review feedback tasks should be invalidated. |
|  | Check the **‘Next Review Date’** field | It should display a calculated date according to the ‘Review Settings’ (one year from today if this document has followed the series of validation tests); if not, set a date in the future |  |  |  |
|  | Check the **‘Effective Date’** field | It should be blank |  |  |  |
| INFO: The **‘Effective Date’** can be set to a date in the future to stall the release of the document till then. This is often used when a new version of a document needs to be read by staff before it’s released for use, or when a document relates to a process or equipment which are not yet in operation. |
|  | OPTIONAL STEP: The **‘Add Authorisation Comments’** checkbox can be ticked to open a field where text can be entered | If ticked, the area should expand to reveal a text box where comments can be added |  |  |  |
|  | Click the button, **‘Start Publishing Workflow’** | The lightbox should close and the workflow summary should update to show the steps of the publishing workflow |  |  |  |
|  | Click the **‘Authorisation Requests’** tab | The ‘Authorisation Requests’ tab in the Controlled Documents area should load |  |  |  |
|  | Locate items which refer to the document for this test | The two authorisation requests in the *‘Publishing Round 1’* box should be listed on this page |  |  |  |
| TIP: If many authorisation requests are listed, the search fields and filters above the listed results can be used to narrow the search. |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Authorise via ‘My Tasks’ in the sidebar** | Log in as the first authoriser in the *‘Publishing Round 1’* box | The alternate user should be logged in |  |  |  |
|  | Click **‘My Tasks’** in the left sidebar | The **‘My Tasks’** sidebar should expand and an ‘Authorise’ task for the document in this test should be listed |  |  |  |
| TIP: If the user has many tasks listed, the filter below the search field in the ‘My Tasks’ sidebar can be set to filter only *‘Authorisation Requests’*; it normally defaults to *‘All Task Types’*. |
|  | Locate and click the ‘Authorise’ task related to this test | The screen should refresh and open the document in question; a light blue rectangle should contain the details of the task; two buttons should be available – **‘Authorise’** and **‘Reject’** |  |  |  |
|  | Click **‘Authorise’** | The light blue ‘authorisation request’ box should disappear and the workflow summary should update; the authoriser’s item in the *‘Publishing Round 1’* box should turn green and display a ‘thumbs-up’ icon |  |  |  |
| INFO: When the **‘Reject’** button is clicked, a lightbox pops up to request a reason and then the document is returned to the draft state it was in at the beginning of this test. If you wish to test this, you can then repeat the test to this point. |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Authorise via ‘Tasks’ in the global menu** | Log in as the second authoriser in the *‘Publishing Round 1’* box | The alternate user should be logged in |  |  |  |
|  | Click **‘Tasks’** in the global menu near the top right corner of the ***iPassport*** screen | The **‘My Tasks’** tab should open and default to the filter, **‘Tasks’** |  |  |  |
|  | Click the filter, **‘Documents to Authorise’** | The filter label should appear highlighted; the number in the small red circle over the label should indicate the number of documents listed below |  |  |  |
|  | Click the row of the document for this test | The screen should refresh and open the document in question; a light blue rectangle should contain the details of the request; two buttons should be available – **‘Authorise’** and **‘Reject’** |  |  |  |
|  | Click **‘Authorise’** | The light blue ‘authorisation request’ box should disappear and the workflow summary should update; the authoriser’s item in the *‘Publishing Round 1’* box should turn green and display a ‘thumbs-up’ icon |  |  |  |
|  | Log out of ***iPassport*** | The login page should appear |  |  |  |
| **Approving publishing of single documents via ‘My Tasks’ in the sidebar** | Log in as the publishing approver listed in the ‘Approval Step’ of the publishing workflow | The *approver* should be logged in |  |  |  |
|  | Click **‘My Tasks’** in the left sidebar | The **‘My Tasks’** sidebar should expand and an ‘Publishing Approval’ task for the document in this test should be listed |  |  |  |
| TIP: If the user has many tasks listed, the filter below the search field in the ‘My Tasks’ sidebar can be set to filter only *‘Publishing Cycle Approval*; it normally defaults to *‘All Task Types’*. |
|  | Locate and click the ‘Publishing Approval’ task related to this test | The screen should refresh and open the document in question; a light blue rectangle should contain the details of the task; two buttons should be available – **‘Approve’** and **‘Reject’** |  |  |  |
|  | Don’t click either button so another option can be illustrated | The screen should remain as is |  |  |  |
| **Approving publishing of multiple documents in the global menu**  | Click **‘Tasks’** in the global menu near the top right corner of the ***iPassport*** screen | The **‘My Tasks’** tab should open and default to the filter, **‘Tasks’** |  |  |  |
|  | Click the filter, **‘Documents to Approve** | The filter label should appear highlighted; the number in the small red circle over the label should indicate the number of documents listed below |  |  |  |
|  | Check the **Actions** column in the list of documents to approve | There should be approve (✓) and reject (x) icons in each row to individually process documents |  |  |  |
|  | Tick the checkbox in the left column of the row of the document for this test | The checkbox should appear selected; the header area should display, ‘1 item selected’ |  |  |  |
| INFO: Multiple documents can be selected individually or all can be selected together by ticking the checkbox in the header area. |
|  | Click the button, **‘Approve Selected’** on the right side of the header area | A lightbox should open, stating 1 task was selected and offering a field for comments |  |  |  |
|  | Click the button, **‘Complete All’** | The lightbox should close and the row of the approved document should be removed from the list |  |  |  |
| Approved Documents | Click the **History** item in the left sidebar | The sidebar should expand to show recently visited records |  |  |  |
|  | Locate and click the ‘View’ item of the document for this test | The document should open to its ‘**General’** tab |  |  |  |
|  | Check the information under the document title | There should be a line which says the controlled document is authorised and due for review on the date previously set; the line below should state that it was approved by the user logged in on today’s date |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 17th August 2021 | Document created |