**Validation Details**

This validation test covers the review process of controlled documents area of iPassport.

The test is designed specifically to cover the review process for a controlled document, managing new or pending change requests.

**Changes between iPassport versions:**

Current version: v3.5.1

Previous version: v3.4.0

Changes to this area of iPassport: No changes, this is new to v3.4.0 of iPassport

**Pre-requisites:**

Administration access is not required for this test.

The settings option, “Disable verification step for the document reviews” should be selected for this test. To confirm this, go to

**Administration->Settings->Organisational Unit Preferences-> *Select Relevant OU (from dropdown)* ->Document Control->** *Tick checkbox next to* “**Disable verification step for the document reviews**”.

The menu item “**Feedback**”, can be named “**Reviews**” dependent on locale; for simplicity, it will be referred to as **Feedback** throughout this exercise.

This process edits an existing **draft controlled document**; it includes change requests and follows the review process.

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.

To complete the validation test you need to have multiple user accounts to ensure that requests can be made and accepted/ rejected by alternative staff.

Ensure that both staff members have access to the same document. The second user should have 10 or fewer tasks as this process uses the **My Tasks** sidebar, if you have more than this then you can go directly to the document if you wish. The (new) *document owner* settings will be covered in this test but it is assumed that none have been assigned yet.

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 are 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 in the **Search** field | The cursor should be available in the **Search** field |  |  |  |
|  | Type the name of the draft controlled document | The search results should filter but not show your controlled document |  |  |  |
| Info. The reason for this is that the Status field is defaulted to Authorised and the document used in the test is a Draft document. If the document is displayed then it is either at Authorised status or the filter has already been adjusted. | | | | | |
|  | Click the **Status** drop down field | The status options should be displayed |  |  |  |
|  | Select **Draft** from the list | The status displayed in the **Status** field should show **Draft** and the search results should be adjusted. |  |  |  |
|  | Click the line in the search results for your controlled document | The controlled document should load on the **General** tab |  |  |  |
| Document control/ management | Check the details under the **General** tab | You should see the **Document Owner(s)** field. If there are owners other than yourself (primary user), we will remove them below. |  |  |  |
| Info. This field was introduced as part of v3.4.0 and can be seen on the left of the screen below the Document Title, the field would typically be hidden on an authorised document. | | | | | |
|  | Click the pencil icon for the **Document Owner(s)** field | The field should open and display a multiple select list |  |  |  |
|  | Click in the **Filter** area | The cursor should be visible in the **Filter** field |  |  |  |
|  | Start to type your name (primary user) | The list should filter down and show your name (primary user) |  |  |  |
|  | Select your name (if not already selected) | A tick should appear against your name |  |  |  |
|  | Click the **Save** button | The multi-select box should close and your name should be displayed in the **Document Owner(s)** list |  |  |  |
| Note. If other users (especially the secondary user) appear in the list, please use this same filter (by clicking on the pencil icon) to de-select them. | | | | | |
| Authorisation | Click the **Authorise Document** button | The authorisation lightbox should be displayed |  |  |  |
| Info. The lightbox will vary depending on whether this is the first draft for this document or not. If it’s a new document (the initial version), skip to the section “Overriding outstanding review tasks” | | | | | |
|  | Click inside the **Document Revision** field | The options, **Minor Revision** and **Major Revision** should be listed. |  |  |  |
|  | Click on **Minor Revision** | The field should now show, **Minor Revision** |  |  |  |
| Overriding outstanding review tasks |  |  |  |  |  |
| Info. The lightbox will have an additional field under the Document Revision field if there are outstanding review tasks. If a field titled, “*Outstanding review tasks exist. Enter the reason for continuing:*” is not visible, skip to the section “Set Compulsory Review for this Document” | | | | | |
|  | If there is a field marked, “**Outstanding review tasks exist. Enter the reason for continuing:**”, enter a pertinent text | When there is a field, “**Outstanding review tasks exist. Enter the reason for continuing:**”, it shouldn’t be left blank |  |  |  |
| Set Compulsory Review for this Document | Scroll down to the **Set Compulsory Review** **for this Document** item ensure this checkbox is checked | A tick should appear against **Set Compulsory Review for this Document** |  |  |  |
|  | Click inside the field, **Set Review Frequency** | The cursor should be visible in the **Set Review Frequency** field |  |  |  |
|  | Enter the value “12” (months) | The number “12” should be visible in the **Set Review Frequency** field |  |  |  |
|  | Click outside of the field | The field, **Next Review Date** should change to show the date a year from today’s date |  |  |  |
|  | Click inside the field, **Next Review Date** | A calendar should pop up. |  |  |  |
|  | Select a date a week from today’s date | The date selected should appear in the field for **Next Review Date** |  |  |  |
|  | Scroll down to the bottom and click on the **Authorise** button | The document should authorise and you should be returned to the **General** tab of the record |  |  |  |
|  | Check the record heading area | The **review on** date that you selected should be displayed under the document’s name |  |  |  |
|  | Click on the **Feedback** tab, just to the right of the **General** tab | The feedback tab should load |  |  |  |
|  | Click on **Request Review Feedback**, located on the right, below the grey explanatory note. | The **Request Review Feedback on this Documen**t lightbox should appear |  |  |  |
|  | Check the field, **Review to be completed before** | A calendar should be visible under the field, **Review to be completed before** |  |  |  |
|  | Select today’s date by clicking on it | The calendar should collapse and today’s date should be displayed in the field |  |  |  |
|  | Click in the Filter field under **Users** | The cursor should be visible inside the field |  |  |  |
|  | Start to type the name of your alternative (secondary) user | The list should filter down and show your alternative (secondary) user |  |  |  |
|  | Select the alternative user (if not already selected) | A tick should appear against the secondary user |  |  |  |
|  | Click the **Submit** button | You should be returned to the **Feedback** area of the record |  |  |  |
|  | Check the Review Feedback entry | This should show “review requested” with today’s date, under Event |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Log in as the secondary (alternative) user | You should be logged in as the secondary (alternative) user |  |  |  |
|  | Click **My Tasks** in the left sidebar | The sidebar should expand to list due tasks |  |  |  |
|  | Check the **My Tasks** side bar | There should be a **Review Feedback** entry due on today’s date |  |  |  |
|  | Click the **Review Feedback** item | You should be taken to the **General** tab of your controlled document |  |  |  |
|  | Collapse the **My Tasks** side bar by clicking on the cross (x) at the top | The **My Tasks** side bar should collapse to the left of the screen |  |  |  |
|  | Check the area directly below the grey bar with the record tabs (General, Feedback, History, etc) | There should be a **Please Review this Document** item with two buttons on the right, **Request Changes** and **No Changes Required** |  |  |  |
|  | Click on **Request Changes** | A lightbox titled **Request Change Please review**… (your document’s title) |  |  |  |
| Change requests | Check the change request number | The change request number should be displayed as **Change Request #1** |  |  |  |
|  | Click the **Submit** button | A warning message should be displayed reading, **You have not added any change requests** |  |  |  |
|  | Click in the editor field | The cursor should be visible in the editor field |  |  |  |
|  | Enter the text “change 1” | The text should be visible in the field |  |  |  |
|  | Click the **Request Another Change** button | Another change request field should open |  |  |  |
|  | Check the change request number of the new field | The change request number should be displayed as **Change Request #2** |  |  |  |
|  | Click in the editor field for Change Request #2 | The cursor should be visible in the editor field |  |  |  |
|  | Enter the text “change 2” | The text should be visible in the field |  |  |  |
|  | Click the **Request Another Change** button | Another change request field should open |  |  |  |
|  | Check the change request number of the new field | The change request number should be displayed as **Change Request #3** |  |  |  |
|  | Click in the editor field for Change Request #3 | The cursor should be visible in the editor field |  |  |  |
|  | Enter the text “change 3” | The text should be visible in the field |  |  |  |
|  | Click the **Submit** button | The change request lightbox should close and you should be returned to the **General** tab (this is the tab we started from) |  |  |  |
|  | Click the **Logout** button | You should be logged out |  |  |  |
|  | Log into iPassport (as the primary user) | - - - - - - |  |  |  |
| History log | Check the left sidebar for the **History** icon | If the History icon is not visible on the left sidebar, enable the preference, *Left Menu - Display My History* under **My Profile>Preferences>Left Menu Bar and Home Page** |  |  |  |
|  | Click the **History** icon | The sidebar should expand to list recent records visited; your controlled document should be listed as **View…** (document index and name) |  |  |  |
|  | Click your controlled document name in the **History** list | The controlled document should load on the **General** tab |  |  |  |
| Info. The History section provides a useful tool to help you avoid using the “back” button on your browser, which can upset the programme’s flow. | | | | | |
|  | Check the area directly below the grey bar with the record tabs (General, Feedback, History, etc) | There should be a summary area that says, “**Review summary for this document whose review is approaching:**  - 3 change requests awaiting approval” followed by the three **Review a Change Request** items |  |  |  |
|  | Check the **Review a Change Request** items | Each **Review a Change Request** item should have the text you entered and 3 buttons, **Approve**, **Approve For Future** and **Reject** |  |  |  |
|  | Click the **Approve** button for the item containing your entry, “change 1” | The **Approve Change Request** lightbox should be displayed |  |  |  |
| Info. The change request has been approved but this still needs to be incorporated in the document, approving the change request simply states that it should be included. | | | | | |
|  | Click the **Approve** button in the lightbox | You should be returned to the **General** tab (this is the tab we started from) |  |  |  |
|  | Click the **Approve For Future** button for the item containing your entry, “change 2” | The **Approve Change Request** lightbox should be displayed |  |  |  |
|  | Click the **Approve For Future** button in the lightbox | You should be returned to the **General** tab |  |  |  |
|  | Click the **Reject** button for the item containing your entry, “change 3” | The **Reject Change Request** lightbox should be displayed |  |  |  |
|  | Click the **Reject** button in the lightbox | You should be returned to the **General** tab |  |  |  |
|  | Check the area directly below the grey bar with the record tabs (General, Feedback, History, etc) | There should be a summary area that says, “**Review summary for this document whose review is approaching:**   * 1 approved change request * 1 change request approved for future version * 1 change request rejected” |  |  |  |
|  | Click the **View Details in the Feedback tab** link | You should be taken to the **Feedback** tab area |  |  |  |
|  | Check the details | You should see the 3 items you created, one rejected, one approved for future (with 2 buttons, **Reject** and **Include in This Version**) and one approved (with a button/ option to **Reject** it) |  |  |  |
|  | Click the **General** tab | The **General** tab area should load |  |  |  |
|  | Check the **For your attention…** area | The same 3 change requests message should appear with a button on the right, **Create New Version** |  |  |  |
|  | Click the **Create New Version** button | The **Create new version** **for** lightbox should be displayed |  |  |  |
|  | Click the **Create new version** button | The lightbox should close, a new draft document should be created and you should be taken to its **General** tab |  |  |  |
|  | Check the area directly below the grey bar with the record tabs (General, Feedback, History, etc) | There should be a summary area that says, “**Review summary for this draft:**  - 1 change request approved for future version” |  |  |  |
|  | Scroll down to find **Changes in this Version (**on the left side) | The change that was approved (for your entry, “change 1”) should be listed with pertinent details |  |  |  |
|  | Click the **Feedback** tab | You should be taken to the **Feedback** tab |  |  |  |
|  | Check the details | There should be one entry for **Change Request**, with a note that it was approved for future |  |  |  |
|  | Click on **Include in This Version**, for the Change Request/ approved for future | The **Approve Change Request** lightbox should be displayed |  |  |  |
|  | Check the **Append this change…** check box | This should be checked |  |  |  |
|  | Click the **Approve** button | The lightbox should close and you should be returned to the **Feedback** tab (this is the tab we accessed the request from) |  |  |  |
|  | Check the details | There should be one Change Request/ approved with your entry “change 2” (under Comments) |  |  |  |
|  | Click the **General** tab | The **General** tab should load |  |  |  |
|  | Scroll down to find **Changes in this Version** | You should now see details for both change requests, corresponding to your entries “change 1” and “change 2” |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 23rd July 2018 | Document created |
| Notes | 26th July 2018 | p.7,row 5, 2nd column, changed to: “This should now show **Change Request/ change requested** (in the second column)” |
| V1.1 | 9th Jan 2020 | Updated to match current interface |