**Validation Details**

This validation test covers document version comparison in iPassport, a tool which provides quick and clear information about changes between two consecutive versions of a controlled document.

**Changes between iPassport versions:**

Current version: v3.5.3

Previous version: N/A

Changes to this area of iPassport:

N/A – New (document)

**Pre-requisites:**

Any user with the role, *Global Editor (excluding admin) or Global Editor (excluding admin and personnel records)* can perform this validation test. *Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required.*

A controlled document with more than one version is required, ideally with differences between two consecutive versions. In this exercise a draft version will be compared with the previous (under review) version. The comparison tool doesn’t compare format, only text content.

USING THE VALIDATION ACCOUNT:

*If the Validation account is used, only PDF documents can be uploaded for this exercise; other formats can’t be previewed on screen or used by the comparison tool. Therefore, the differences between the two versions must be introduced externally in Word, for example and the two copies must be saved as PDF documents. The files must then be uploaded as consecutive versions of a controlled document in the Validation account. The first section of the test describes this process.*

If new documents will be added, this procedure should be performed within a test or training account so that unwanted records are not stored within a live account. It’s possible to complete only the second part of this test, starting from the, DOCUMENT COMPARISON SECTION, in a production account as the comparison tool doesn’t affect any data in the account.

All names such as menu items and sub-menu items will be displayed in bold, for example **Noticeboard.**

This test starts from within iPassport, signed in with the permissions described above.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| §§§ |  |  |  |  |  |
| **VALIDATION ACCOUNT DOCUMENT SETUP** | *Skip this section if not using the validation account for this exercise.* | *A document with two versions will be created, using the minimum number of steps required.* |  |  |  |
| Menu | Hover over the **Laboratory Records** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the plus “**[+]**” sign next to the **Controlled Documents** sub-menu | The plus “**[+]**” sign item should be highlighted |  |  |  |
| Create new Controlled Document | Click the plus “**[+]**” sign item | The **New Controlled Document (step 1)** screen should open |  |  |  |
|  | Click in the **Organisational Unit** field | A dropdown menu of OUs should appear |  |  |  |
|  | Click/select the OU, *Validation* | The name of the OU (*Validation*) should display in the field (NOTE: It is not a requirement to select the *Validation* OU but it helps keep this process simple to describe) |  |  |  |
|  | Click in the field, “**Please choose a document type**” | A dropdown menu of document types should appear |  |  |  |
|  | Click/select the type, “*Document”* | The type, “*Document*” should display in the field |  |  |  |
|  | Click the button, **Next Step** | The screen, “**New Document for Validation: step 2 of 4**” should open |  |  |  |
|  | Click in the field, **Document Title** | The cursor should be visible in the **Document Title** field |  |  |  |
|  | Enter a name for the document | The name should be displayed in the field |  |  |  |
|  | Find and select the current user’s name in the filter, **Author(s)** | The user logged in should have a tick next to their name |  |  |  |
|  | Click the button, **Next Step** | The screen, “**New Document for Validation: step 3 of 4**” should open |  |  |  |
|  | Click the button, **Next Step** | The screen, “**New Document for Validation: step 4 of 4**” should open |  |  |  |
|  | Click the button “**Choose file**”, inside the field, **File** | A browser file search window should open |  |  |  |
|  | Select the first version of the document in PDF format to upload | The selected document should appear highlighted |  |  |  |
|  | Click **Open** (some browsers might have different terminology for this button) | The title of the document selected should appear in the field, **File** |  |  |  |
|  | Click **Upload** | A banner with the message, “*Document uploaded successfully*” should appear shortly after |  |  |  |
|  | Click **Create** | The screen should refresh to show the new document in draft state |  |  |  |
| Authorise a Draft | Click the button **Authorise Document**, found in the ‘Review Summary’ box | The “**Authorise**” lightbox should open |  |  |  |
|  | Untick the checkbox by, “**Set Next Compulsory Review for this Document**” | The tick mark should disappear and the area immediately below should collapse |  |  |  |
|  | Click **Authorise** | The screen should refresh to show the new document as authorised (*version 1.0*) |  |  |  |
| Create a new version | Click in the field, **Actions** (to the right of the document title) | A dropdown menu should appear |  |  |  |
|  | Select, *Create new version* | The text, “*Create new version*” should display in the field |  |  |  |
|  | Click **Go** | The lightbox, “**Create new Version**” should appear |  |  |  |
|  | Click **Create new Version** | The screen should refresh to show a new draft version of the document |  |  |  |
|  | Click the **Procedure** tab | The **Procedure** page should open |  |  |  |
|  | Click the **pencil icon** next to the document title, under the field, “**Click the link to download the latest version:**” | The document title should be replaced by the button, “**Choose file**” and **Upload/Cancel** buttons should appear |  |  |  |
|  | Click **Choose file** | A browser file search window should open |  |  |  |
|  | Select the second version of the document in PDF format to upload | The selected document should appear highlighted |  |  |  |
|  | Click **Open** (some browsers might have different terminology for this button) | The title of the document selected should appear in the field |  |  |  |
|  | Click **Upload** | A banner with the message, “*Document uploaded successfully*” should appear after a few seconds |  |  |  |
| END OF VALIDATION ACCOUNT DOCUMENT SETUP |  |  |  |  |  |
| §§§ |  |  |  |  |  |
| DOCUMENT COMPARISON SECTION |  |  |  |  |  |
| Menu | 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 |  |  |  |
| Find and Open a Document | Click in the **OU** field | A dropdown menu of OUs should appear |  |  |  |
|  | Click/select the OU where the document resides (*Validation* if the setup above was followed) | The name of the OU should display in the field |  |  |  |
|  | Click in the **Status** field | A dropdown menu of statuses should appear |  |  |  |
|  | Click/select the status, *Draft* | The option, “*Draft*” should display in the **Status** field |  |  |  |
|  | Click in the **Search** field | The cursor should be visible in the **Search** field |  |  |  |
|  | Start typing the name or index number of the document for this test | The results area below should start filtering down to meet the search criteria |  |  |  |
|  | Click the row of the document when it appears listed in the results area | The document should open to its **General** tab |  |  |  |
| Compare with previous version | Click the button with a magnifying glass icon titled, “**Compare with** <*previous version*>” | The lightbox, “**Showing all changes**” should open |  |  |  |
|  | Check the header area of the lightbox | The window should have two halves, the left side should have the previous version number as a title (e.g., *Version 1.0*) and the status of the version (e.g., *Under Review*); the right side should be titled, *Draft Version* (if this test has been followed, using a draft document as the source) |  |  |  |
|  | Check the central column that divides the two versions.  NOTE: This column collapses when the button, “**Sync scrolling**” is disabled | If there are differences between the two versions, small red and/or green rectangles should be visible within the column; there should be a slightly larger grey rectangle that can be dragged up and down the column |  |  |  |
|  | Drag the scrolling grey rectangle down the central column to one of the areas where coloured rectangles appear | The two document versions should scroll with it and display text highlighted in red (removed) in the right pane and/or text highlighted in green (added) in the left pain |  |  |  |
|  | Click the plus (+) sign in the tool bar above the left version several times | The screen should zoom in to enlarge the text |  |  |  |
|  | Move your cursor over the left pane | The cursor icon should be an open hand |  |  |  |
|  | Click and drag your cursor in any direction | The cursor icon should become a closed hand and the text should move together with it |  |  |  |
|  | Click the Hand icon in the tool bar and move back over the text area | The cursor icon should become a regular mouse icon, allowing text to be selected |  |  |  |
|  | Click the “**X**” in the top right corner of the window to close it | The screen should return to the draft document’s **General** tab |  |  |  |

|  |  |  |
| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 28th Apr 2020 | Document created |