**Validation Details**

This validation test covers how to create a user account in ***iPassport***.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of iPassport: This validation test includes recent features added to the ‘New User’ tab which allow including new users in ‘distribution lists’ and specifying if they are permitted to contact iPassport support directly from the app. There is also a recent feature which allows importing multiple users with a CSV file; this is covered in a separate validation test.

**Pre-requisites:**

Administration access is required by the user performing this test. A new user account will be created and it’s recommended to add the primary user’s email address to make this test easier to follow.

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

This process follows the steps required to add an individual as a user in ***iPassport***.

The system will prompt the user to select their same Home OU for the new user but if they have access to user records in other OUs, these OUs will also be available for selection.

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 a user with Admin privileges) | - - - - - - |  |  |  |
| Menu | Hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | Click the **Users** sub-menu item | The **Search Users** tab should be loaded |  |  |  |
|  | Click the **New User** tab | The *’Create User Account*’ form should display |  |  |  |
|  | Click the field, **First Name** | The cursor should blink in the pink field |  |  |  |
|  | Enter a first name for the user to be added | The field should turn blue as text is entered; the first name should display in the field |  |  |  |
|  | The **Middle Name** can be skipped; it works exactly like the ‘First Name’ field | The **Middle Name** field should remain blank unless text was entered |  |  |  |
|  | Click the field, **Family Name** | The cursor should blink in the pink field |  |  |  |
|  | Enter the surname of the user to be added | The field should turn blue as text is entered; the surname should display in the field |  |  |  |
|  | Click the field, **Email** | The cursor should blink in the field |  |  |  |
|  | For test purposes and unless a real user is being added, enter the email address of the user logged in | The logged in user’s email address should display in the field |  |  |  |
| Chosen ‘username’ | Click the field, **Username** | The cursor should blink in the pink field |  |  |  |
|  | Enter a username for the user to log in | The field should turn blue as text is entered; the chosen username should display in the field |  |  |  |
| System ‘username’ | Alternatively, instead of entering a username, click the lightbulb under the **Username** field, next to the message, *“Click here to auto-generate a username (First/Last Names must be set first).”* | The **Username** field should be automatically populated with a username made by adding the first initial to the surname |  |  |  |
|  | Click the field, **Home OU** | A dropdown menu of all OUs the user can access as an administrator should display |  |  |  |
|  | Select a Home OU for the new user by clicking it | The selected OU should display in the field |  |  |  |
|  | Click on the word *“Filter”* in the multi-select box titled, **‘User Group membership’** | The word *“Filter”* should disappear, and the cursor should blink in the search field |  |  |  |
|  | Start typing the name of one of the user groups | The list below should narrow to match the search criteria |  |  |  |
|  | Select an appropriate user group by ticking its checkbox | A checkmark should appear by the user group selected |  |  |  |
|  | Hover over the **‘Skilled Group membership’** list of items and scroll to move up and down the list | The list of skilled groups should scroll to allow finding any which are available to the user logged in |  |  |  |
|  | Do not select a skilled group; this will avoid generating emails and tasks not relevant to this exercise | No skilled groups should be selected; they can always be added after the user record is created, for other tests |  |  |  |
|  | Hover over the **‘Distribution List membership’** multi-select box items and then scroll to move up and down the list | The list of ‘distribution lists’ should scroll to allow finding any available to the user logged in |  |  |  |
|  | Select a distribution list if appropriate by ticking its checkbox | A checkmark should appear by any distribution list selected |  |  |  |
| NOTE: The multi-select fields, **‘User Group membership’**, **‘Skilled Group membership’** and **‘Distribution List membership’** allow selecting more than one item when required. | | | | | |
|  | Tick the checkbox under **‘Limit User to Simple View?’** | A checkmark should appear under the option, **‘Limit User to Simple View?’** |  |  |  |
| NOTE: ‘Simple View’ reduces the number of menus available and only provides basic usage tools; this will be demonstrated and adjusted below. | | | | | |
|  | Click the field titled, **‘Can Contact Support?’** | A dropdown menu offering *‘Yes’* or *‘No’* should appear |  |  |  |
|  | Select the option, *‘No’* | The field should display the word *‘No’* |  |  |  |
|  | Click the button, **Create User** | A new user record should display shortly after, open to its **General** tab |  |  |  |
|  | Check the fields on the **General** tab | The information entered should all be displayed, and a pencil icon should be available in every field so it can be edited |  |  |  |
| §§§ End of User Creation |  |  |  |  |  |
| Welcome Email | Check emails sent to the address entered for the new user | A ‘welcome’ email should have been delivered, containing the chosen username and a password created by the system |  |  |  |
| NOTE: If for any reason emails are disabled, please follow the instructions below to reset passwords manually. | | | | | |
|  | Log out of iPassport | The screen should refresh to show the login page |  |  |  |
| Log in as new user | Use the credentials from the email to log in as the new user | A **‘Renew your Password’** page should appear after first login |  |  |  |
| Reset Password at first login | Enter the password from the email in the field, **Current Password** | The password entered should not be visible and a dot (“•”) should show for every character |  |  |  |
|  | Design a new password and enter it in the fields, **New Password** and, **Confirm New Password** | All three fields should have passwords entered |  |  |  |
|  | Click **Change my password** | If the information entered is valid, the new user will be logged in and normally, some notices will pop up |  |  |  |
| NOTE: Password complexity is managed in the ‘Settings’ area and verification/approval of new passwords will be subject to these settings. | | | | | |
|  | Read and acknowledge the notices which pop up by clicking *‘I have read this notice’* or *‘Close’*, according to the relevance of the notice | Each notice should close until iPassport’s Simple View ‘Home’ screen is left clear |  |  |  |
| Simple View | Notice the absence of menus in the top part of the screen and the absence of the **‘Simple View’** button at the bottom of the left sidebar | The only menu available should be the left sidebar; the **‘Simple View’** button should not be available |  |  |  |
|  | Click the link, **‘Need Help?’** | a new page should open to the **‘Who Can Help Me?’** tab |  |  |  |
| Can contact support | Check that the tab, **‘Contact iPassport Support’** is absent | The **‘Contact iPassport Support’** tab should be missing |  |  |  |
|  | Log out of iPassport | The screen should refresh to show the login page |  |  |  |
| NOTE: By disabling **‘Can Contact Support?’**, basic users can only request help internally, allowing their managers to be aware of any simple access and process issues they might encounter. | | | | | |
|  | Log back in as the administrator | - - - - - - |  |  |  |
| Search for user | Hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | Click the **Users** sub-menu item | The **Search Users** tab should be loaded |  |  |  |
|  | Click the field **‘Home OU’** and select the OU assigned to the new user; if not remembered, select the ‘blank’ option | The list of users below should refresh to match the search criteria |  |  |  |
|  | Start typing the name of the user in the field, **‘Search Users’** | The list below should refresh to match text entered |  |  |  |
| Adjusting user records | Locate and click the row of the new user | The screen should refresh to display the new user record’s **General** tab |  |  |  |
|  | Locate the field, **‘Limit User to Simple View?’** and click the pencil icon under it | The field should expand to provide **‘Save’** and **‘Cancel’** buttons next to a checkbox |  |  |  |
|  | Untick the checkbox and click **‘Save’** | The word ‘No’ should display under the field, **‘Limit User to Simple View?’** |  |  |  |
| NOTE: Checking the **‘Simple View’** setting is not part of this exercise but if desired, log out and back in as the new user; the **‘Simple View’** button should be visible and adjustable by the new user. | | | | | |
|  |  |  |  |  |  |
| §§§ Optional Step |  |  |  |  |  |
| Reset Password Manually | Click the **Actions** field in the new user record | A dropdown menu should appear |  |  |  |
|  | Select the option, *‘Reset Password’* and click **Go** | A lightbox (pop-up window on grey background) should appear |  |  |  |
|  | Click the field, **New Password** | The cursor should blink in the field |  |  |  |
|  | Enter a known password | The password should be visible in the field; make note of it |  |  |  |
|  | Click the field, **Retype** **New Password** | The cursor should blink in the field |  |  |  |
|  | Enter the same password as above | The password should be visible in the field |  |  |  |
|  | Click **Reset Password** | The lightbox should close to return to the user record **General** tab |  |  |  |
| NOTE: An email should be delivered to the user whose password has been reset but making note of it also allows communicating it by other means. | | | | | |

|  |  |  |
| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 6th July 2021 | Document created |