**Validation Details**

This validation test covers how to create multiple user accounts in ***iPassport*** from the **‘Import Users’** tab. It also includes performing and exporting user searches.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of iPassport: It is possible to add multiple users to ***iPassport*** by uploading a CSV spreadsheet with the required information since v3.5.7. The user **Search** tab now allows exporting reports, from a list of all active users down to reports of single users.

**Pre-requisites:**

Administration access is required by the user performing this test. Two new users will be added to keep the test simple, but this process allows adding as many users as required.

*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 multiple users in ***iPassport*** with a CSV populated with the users’ data. Access to Excel™ or another spreadsheet app is required to produce the CSV. The information entered in the spreadsheet must be accurate so the system can recognise it. It is recommended to copy/paste information from the account to ensure correct spelling and format.

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** |
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|  | 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 **Import Users** tab | The screen should refresh to display the I**mport Users** tab with only steps 1 and 2 showing |  |  |  |
|  | Click the underlined word, **‘here’** in Step 1 | A CSV template should be automatically downloaded locally |  |  |  |
| Populate CSV | Open the template in Excel™ or some equivalent app | A spreadsheet with two rows should open; the first row contains parameter titles and the second one provides examples |  |  |  |
| NOTE: The system will ignore the example row so it can be left untouched. |
|  | Add **First Names** of two users to import in column A, rows 3 & 4 | First names should appear in cells A3 and A4 |  |  |  |
|  | Add **Last Names** in column B, rows 3 & 4 | Last names should appear in cells B3 and B4 |  |  |  |
|  | Leave the cells under ‘Desired Login’ (column C) blank so the system auto-generates usernames | Cells C3 & C4 should be left empty |  |  |  |
|  | In column D. enter the logged in user’s **Email** address to track the account creation afterwards | The primary user’s email address should appear in cells D3 & D4 |  |  |  |
| Get info from ***iPassport*** | Return to ***iPassport*** and hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | Click the **User Groups** sub-menu item | The **Search User Groups** tab should be loaded |  |  |  |
|  | Locate and click the row of an appropriate user group for the two users being added | The user group record should open to its **General** tab |  |  |  |
|  | Select and copy (CTRL+C) the **Short Name** of the user group | The short name of the user group should be copied to the clipboard |  |  |  |
| Populate CSV | Return to the CSV and paste the copied user group name under **‘User Group Membership’** (column E) in rows 3 & 4 | Cells E3 & E4 should display the exact short name of the user group selected |  |  |  |
| NOTE: Columns F & G **(‘User Group Membership’** and **‘Distribution List Membership’**) can be left empty to avoid generating unnecessary emails and tasks. If populated, the same process as for **‘User Group Membership’** addition should be used. |
| Get info from ***iPassport*** | Return to ***iPassport*** and hover over the **Administration** main menu item | The sub-menu should appear |  |  |  |
|  | Click the **Organisational Units** sub-menu item | The **Search OUs** tab should be loaded |  |  |  |
|  | Locate and click the row of the intended Home OU for the two users being added | The user group record should open to its **General** tab |  |  |  |
|  | Select and copy (CTRL+C) the **Short Name** of the OU | The short name of the user group should be copied to the clipboard |  |  |  |
| Populate CSV | Return to the CSV and paste the copied OU name under **‘Home OU’** (column H) in rows 3 & 4 | Cells H3 & H4 should display the exact short name of the OU selected |  |  |  |
| NOTE: Column I (**’Timezone’**) can be left empty and the user will be assigned the account’s time zone; Column J (**UID**) only applies to accounts with SAML login and can otherwise be left empty. |
| Export CSV | Save and export the spreadsheet in CSV format. This operation depends on the application used; in Excel™, use *‘Save As’* and select the file format, *‘Comma-separated Values (.csv)’*; make note of the folder where it’s saved | The saved file should have the extension ‘.csv’ and should be easily located in an accessible folder |  |  |  |
| Upload CSV in ***iPassport*** | Return to ***iPassport*** and navigate to the **‘Import Users’** tab | The screen should refresh to display the I**mport Users** tab with only steps 1 and 2 showing |  |  |  |
|  | Click anywhere in the pale-yellow dotted area of Step 2 | The browser’s file explorer should open |  |  |  |
|  | Search and select the populated CSV file in your folders | The selected file should appear highlighted |  |  |  |
|  | Click *‘Open’* (some browsers use other words) to upload the selected file | The file explorer should disappear and the ***iPassport*** tab, **‘Import Users’**, should now display at least steps 1,2 & 3 |  |  |  |
| Step 3 - Validate the imported CSV | Check **‘Step 3’**; if no errors were found, skip the next step and go to **‘Step 4 – Import users’** | If any inconsistencies were found in the upload, the system will list them under Step 3; otherwise, it will show the message, *‘No Errors found, continue to Step 4’* |  |  |  |
| Fixing CSV if necessary | If errors were reported, the problematic ‘**Value**(s)’ will appear in the second column; fix these items in the spreadsheet, export it to CSV again and upload it in the Step 2 dotted area | No users should have been imported if errors were found; any errors should be listed under Step 3 and once the spreadsheet is fixed and re-uploaded, a new diagnostic will be performed by the system |  |  |  |
| Step 4 – Import users | If Step 4 appears, leave the checkbox under the field, **‘Send Welcome Email?’**, ticked | A checkmark should display under the field, **‘Send Welcome Email?’**  |  |  |  |
| NOTE: If the **‘Send Welcome Email?’** preference is disabled, the ***iPassport*** technical team will be required to reactivate this. It’s reserved for when many users are added to a new account before it’s ready for use. |
|  | Select one of the two options for **‘User Login Format’** by clicking the field and then clicking one of them | The selected option should show in the field |  |  |  |
|  | Click the button, **Import Users** | Once completed, Step 4 should display a report of the **‘Import Results’**; the users added and their details should be listed |  |  |  |
| §§ End of user import  |  |  |  |  |  |
|  |  |  |  |  |  |
| Exporting User searches | From the **Import Users** tab click the **Search Users** tab;From login, navigate to **Administration > Users > Search Users** | The **Search Users** tab should be loaded |  |  |  |
|  | Click the **’Home OU’** field | A dropdown list of OUs available to the user should appear |  |  |  |
|  | Select the OU which was assigned as the ‘Home OU’ for the users imported above | The selected OU should display in the field |  |  |  |
|  | Click the **’Order Results By’** field | A dropdown list of sorting options should appear |  |  |  |
|  | Select the option, *‘Users Added (Newest first)’* by clicking it | The selected option should display in the field and the list of users below should have the two new users (from the test above) at the top |  |  |  |
|  | Click ‘Export Results’ on the right of the results header area | A pop-up window should appear with the message, “Generating export, please be patient.”  |  |  |  |
|  | When the ‘Export is ready…’, click the down arrow icon to download the report | A CSV copy of the report should be downloaded to the downloads area |  |  |  |
|  | Open the downloaded report in Excel™ or similar | The spreadsheet should open and list the same users as appear on screen |  |  |  |

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