**Validation Details**

This validation test addresses competency assessments, covering cloning assessments and OU scope of assessments, within the competency tool found in iPassport.

**Changes between iPassport versions:**

Current version: v3.5.1

Previous version: v3.4.1

Changes to this area of iPassport: N/A – New (document)

**Pre-requisites:**

Administration access IS required for this test to manage an alternate user’s OU scope before starting. The user must be a member of a user group that includes the role **Competency Assessor** or **Global Editor** within specific OUs (not all OUs). Specifically, the permissions, ***Competency****:Assign Assessments,* ***Competency****:View Assessments* and***Competency****:Perform Competency Assessment* are required.

This process follows from having published an assessment (validation test, **Competency Assessments – Publishing and Performing Assessments, part 2**). It will be cloned and its scope will be limited to one OU so that one of the users can’t access it for not having permissions in that OU.

You require access to several users during this test, in addition to the administrator. One user is to be assessed (we’ll call *candidate*), one is to be the *assessor* (already declared in the assessment in Part 1 of this test) and one to be an alternate examiner (we’ll call *examiner-sub*). You and your alternate users should have less than 10 tasks assigned so that the **My Tasks** sidebar can be used as it is in the test.

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.

This procedure should be performed within a test or training account so that unwanted records are not stored within a live account.

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.**

This test starts from within iPassport.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| ASSESSMENT DESIGNER | Hover over the **Competency** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Assessment** **Designer** sub-menu  | The **Assessment Designer** item should be highlighted  |  |  |  |
|  | Click the **Assessment Designer** item | The **List Assessment Templates** tab should be displayed |  |  |  |
|  | Start typing the name of the published Assessment Template (created in this series of tests) in the **Search** field  | The list below should start filtering down to your search |  |  |  |
|  | Open your assessment by clicking its row | The draft assessment should open on the General tab |  |  |  |
| CLONING ASSESSMENT TEMPLATES | Expand the **Actions** dropdown menu in the header area of the template | The dropdown menu should expand and show **Archive**, **Assign Assessment**, **Clone** **Template** and **Create new Version** |  |  |  |
|  | Click **Clone** **Template** | The option should be displayed in the textbox |  |  |  |
|  | Click **Go** | A dialog box should open to ask, “Are you sure you want to create a new copy of this Template?” |  |  |  |
|  | Click **OK** | A Draft template of the same name should open to version 1.0 |  |  |  |
|  | Check the code of the new draft assessment template  | It should have the word,“(copy)” next to the original code |  |  |  |
| ADVANCED SETTINGS – ASSESSMENT TEMPLATES | Scroll down to the section, **Advanced Settings** | There should be 6 settings listed in collapsed form – only the titles are visible |  |  |  |
|  | Check **OU Scope** | The word “(All)” should show next to it to indicate that no OU restrictions have been set |  |  |  |
|  | Click **OU Scope** | The field should expand to show the field, **Limit Visibility to these OUs** |  |  |  |
|  | Click the pencil **edit** icon under, **Limit Visibility to these OUs** | The area should expand to show a text field with **Save** and **Cancel** buttons |  |  |  |
|  | Click **inside the text field** | A dropdown menu of OUs should appear |  |  |  |
|  | Select an OU in which your alternate user doesn’t have permission to view assessments | The selected OU should display in the box, with an “x” next to it |  |  |  |
|  | Click outside the box to collapse the dropdown list | The **Save** and **Cancel** buttons should be visible under the text field |  |  |  |
|  | Click Save | The buttons should disappear and the selected OU should be displayed under, **Limit Visibility to these OUs** |  |  |  |
|  | Click the **Examiner Settings** option | The **Examiner Settings** option should expand |  |  |  |
|  | Check that the *examiner* does have permission to be an assessor in the OU you just selected. | --------If not, change the OU or select a different examiner |  |  |  |
| PUBLISH ASSESSMENT TEMPLATE | Scroll up and expand the **Actions** dropdown menu in the header area of the template | The dropdown menu should expand and show **Clone** **Template**, **Delete** and **Publish** |  |  |  |
|  | Select the **Publish** option | The **Publish** option should be displayed in the dropdown menu area |  |  |  |
|  | Click the **Go** button | The information message **Are you sure you want to publish this Template?** Should be displayed |  |  |  |
|  | Click **Ok** in the information message | A warning message should be displayed saying **Pass score can’t be set to zero** |  |  |  |
|  | Click **Close** in the warning message | The message should be hidden/ removed |  |  |  |
|  | Click the pencil **edit** icon for **Pass Score** | The Pass Score field should become editable  |  |  |  |
|  | Set the **Pass Score** to 2 points | The field should show 2 points |  |  |  |
|  | Click the **Save** button | The **Pass Score** field should be ‘closed’ again and the score should show 2 |  |  |  |
|  | Click the pencil edit icon for the **Number of Questions** | The **Number of Questions** field should open |  |  |  |
|  | Add 2 to the field | A 2 should be visible in the field |  |  |  |
|  | Click the **Save** button | The **Number of Questions** field should close again and display a 2 |  |  |  |
|  | Expand the dropdown menu in the header area and select **Publish** | **Publish** should be displayed in the drop down menu area |  |  |  |
|  | Click the **Go** button | The information message **Are you sure you want to publish this Template?** Should be displayed |  |  |  |
|  | Click **Ok** in the information message | The test should be published and you should see **PUBLISHED** in the header area of the test template |  |  |  |
| ASSIGN ASSESSMENT | Hover over the **Competency** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Assessments** sub-menu  | The **Assessment** item should be highlighted  |  |  |  |
|  | Click the “+” sign next to the **Assessments** item | The **Assign Assessments** tab should be displayed |  |  |  |
|  | Select your assessment from the **Assessment Template** list | The assessment should show as selected and the **Title** field should auto populate with the name of that assessment |  |  |  |
|  | Click the **Filter** area of the **Create Assessment for Staff Member(s)** field | The cursor should be displayed in the Filter area of the **Create Assessment for Staff Member(s)** field |  |  |  |
|  | Start to type your *candidate’s* name | The search results should filter down to your candidate.NOTE: This is partially dependant on the length of your search string, it may show more users |  |  |  |
|  | Select your *candidate* | A tick should appear against their name |  |  |  |
|  | Click in the **Due Date** field | A calendar tool should be displayed |  |  |  |
|  | Select the day after today and click | The calendar tool should be closed and the date should be displayed in the **Due Date** field |  |  |  |
|  | Click the **Create Assessments** button | You should see a **Successfully** **Assigned** information message |  |  |  |
|  | Click **List Assessments** | You should see your newly assigned assessment listed with a **Perform Assessment** button next to it - you (as administrator) are an eligible assessor |  |  |  |
|  | Click the **Logout** icon in the left sidebar menu | You should be logged out |  |  |  |
|  | Log into iPassport as the *examiner* | You should be logged in as the examiner |  |  |  |
|  | Click the **My Tasks** sidebar | The **My Tasks** sidebar should open |  |  |  |
|  | Check the task list here | You should see the **Competency Assessment** task for the newly assigned one |  |  |  |
|  | Check the **Due** date | This should show the day after your test (the date you selected) |  |  |  |
|  | Click the “**X**” on the top right of the **My Tasks** bar to collapse it | The **My Tasks** sidebar should collapse |  |  |  |
|  | Hover over the **Competency** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Assessments** sub-menu  | The **Test Templates** item should be highlighted  |  |  |  |
|  | Click the **Assessments** item | The **List Assessments** tab should be displayed |  |  |  |
|  | Look for the assessment assigned above | There should be a **Perform Assessment** button to the right of the assessment |  |  |  |
|  | Click the **Logout** icon in the left sidebar menu | You should be logged out of iPassport |  |  |  |
|  | Login as your alternate assessor (*assessor-sub*), who doesn’t have assessor permissions in the OU you declared for the assessment | You should be logged in |  |  |  |
|  | Hover over the **Competency** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Assessments** sub-menu  | The **Test Templates** item should be highlighted  |  |  |  |
|  | Click the **Assessments** item | The **List Assessments** tab should be displayed |  |  |  |
|  | Look for the assessment assigned above | There should NOT be a **Perform Assessment** button to the right of the assessment |  |  |  |
|  | Click the **Assign Assessments** tab | The **Assign Assessments** tab should open |  |  |  |
|  | Look for your assessment from the **Assessment Template** list | The assessment should NOT be available for this user to assign |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 15th October 2018 | Document created |
| v1.1 | 13th February 2020 | Updated to reflect current user interface, v3.5.1 |