**Validation Details**

This validation test covers competency assessments, focusing on Advanced Settings (except Organisational Unit scope, which is covered in a separate document), publishing and performing 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:

This version updated to reflect minor improvements in the user interface.

**Pre-requisites:**

You require access to two users during this series of tests, one to be assessed (we’ll call *candidate*) and one to be the examiner (we’ll call *examiner*). It does not matter which user you create the assessment template with, as long as they both have *Competency Editor* permissions. The *examiner* requires *Competency Assessor* permissions in the *candidate’s* Home OU. You and your alternate user should have less than 10 tasks assigned so that the **My Tasks** sidebar can be used as it is in the test. The role, *‘Global Editor (excluding admin)’* also includes all the permissions required by both users.

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

 *Emails are not delivered from the Validation account to prevent confusion with production account emails.*

This process follows from creating a draft assessment template in the previous test. In this test the assessment template’s advanced settings are adjusted; it’s then published, assigned to the *candidate* and the assessment is performed.

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.

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.**

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  | Log into *iPassport* as the *candidate*, with *Competency Editor* permissions | - - - - - - |  |  |  |
| 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 draft Assessment Template 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 |  |  |  |
| SAVE PROGRESS | Click the dropdown menu under **Allow progress to be saved?** | “Yes” and “No” options should appear with “Yes” set as the default |  |  |  |
|  | Leave the option, “**Yes**” selected | The option, “Yes” should display in the text box; this will allow the assessment to be interrupted and returned to later without losing progress made |  |  |  |
| 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 |  |  |  |
|  | Click **Re-take Settings** | The section should expand to show 3 editable parameters |  |  |  |
|  | Click the pencil icon under **Number of attempts allowed** | A field should open with a “1” in it and Save/Cancel buttons to the right |  |  |  |
|  | Change the “1” for a “2” and click **Save** | The field should close and a “2” should be visible with the pencil icon next to it |  |  |  |
|  | Check the other two parameters under **Re-take Settings** | **Number of days to complete assessment** should be “Not Set” and **Cool off period (days)** should be “Not Set” |  |  |  |
|  | Click **Re-take Settings** to collapse it | The fields under **Re-take Settings** should disappear |  |  |  |
|  | Click **Reissue Settings** | The section should expand to show 1 editable parameter |  |  |  |
|  | Click the pencil icon under **Assessment Valid For (Months)** | A field should open, with Save/Cancel buttons to the right |  |  |  |
|  | Type “1” and click **Save** | The field should close and a “1” should be visible with the pencil icon next to it |  |  |  |
|  | Click the pencil icon under **Automatically re-issue the test**  | A field should open, with 3 options (default is, *Do not re-issue*) and Save/Cancel buttons below |  |  |  |
|  | Select, “*1 month after the test was passed*” and click **Save** | The field under **Automatically re-issue the test** should now read, *1 month after the test was passed* |  |  |  |
|  | Click **Reissue Settings** to collapse it | The fields under **Reissue Settings** should disappear |  |  |  |
|  | Click **Reference Documents** | The section should expand to show the button, **Add link to document** |  |  |  |
|  | Click **Add link to document** | A lightbox titled, **Competency Template** should open |  |  |  |
|  | Click in the textbox for **Controlled documents containing:** | The cursor should be visible in the textbox |  |  |  |
|  | Start typing the name or index of the reference document | The list below should start filtering down to your search |  |  |  |
|  | Click the link icon on the right of your selected document | The lightbox should close and the document should appear listed under the button, **Add link to document** |  |  |  |
|  | Pretend that was the wrong document and delete it from this list by clicking the bin(trash) icon on its right | A dialog box should open asking, “Are you sure you wish to remove this document link?” |  |  |  |
|  | Click **Cancel** to abort the operation, assuming it was the right doc after all | The dialog box should close and you should be returned to the Assessment Template |  |  |  |
| PUBLISH ASSESSMENT TEMPLATE | 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 | Expand the dropdown menu for **Actions** in the header area | The menu should be expanded and you should see the options: **Archive**, **Assign Assessment**, **Clone Template**, **Create new Version**, & **Delete** |  |  |  |
|  | Select the **Assign Assessment** option | The **Assign Assessment** option should be displayed in the dropdown menu |  |  |  |
|  | Click the **Go** button | The assign assessment lightbox should open  |  |  |  |
|  | 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 name (the *candidate*) | The search results should filter down to you.NOTE: This is partially dependant on the length of your search string, it may show more users |  |  |  |
|  | Select yourself | A tick should appear against your 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 |  |  |  |
|  | Navigate to **Competency> Assessments>****List Assessments** | You should see your newly assigned assessment listed but it shouldn’t display the **Perform Assessment** button (assessing yourself isn’t valid) |  |  |  |
|  | Click the **Logout** option in the top right corner of iPassport | You should be logged out |  |  |  |
| PERFORM ASSESSMENT | Log into iPassport as the *examiner* | You should be logged in as the examiner |  |  |  |
|  | Click **Tasks** from the global menu at the top | Your **Tasks** should open under the **Tasks** sub-tab |  |  |  |
|  | 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 **task Details** button on the right | The task should expand to show details. The *examiner’s* name should appear in the **Assigned To** field, and the *candidate’s* name should appear in the **Description** field |  |  |  |
|  | Scroll down and click the **Perform Assessment** button | The test should open |  |  |  |
|  | Click the grey bar under the candidate’s name, with the name of the linked document added above | A lightbox should appear, containing a view of the linked document, with a search tool at the top |  |  |  |
|  | Click the “X” on the top right corner to close the linked document view | You should be returned to the assessment |  |  |  |
|  | Check the number of questions | There should be two questions, one of which is the checkbox question |  |  |  |
|  | Complete the checkbox question by ticking 2 correct answers (assume the examiner has presented the candidate with the 4 options and the candidate has chosen 2 correct ones) | 2 of the 4 checkboxes should appear ticked (they should both be correct options); **note**: remember it’s the *examiner* who is filling the assessment form within *iPassport* |  |  |  |
|  | Add an *examiner’s* note in the **Comments** field | The text entered should display in the field, **Comments** |  |  |  |
| SAVE PROGRESS | Scroll down and click **Save Progress** | The **Save Progress** button should momentarily change to, **Saving…** |  |  |  |
|  | Click the “X” in the top right corner of the assessment to close it | The screen should return to the **My Tasks** tab |  |  |  |
|  | Now click **My Tasks** in the left sidebar | The sidebar should expand to display outstanding tasks and the *‘Competency Assessment’* task for the assessment just closed should be present |  |  |  |
|  | Click the *‘Competency Assessment’* task item in the sidebar | The assessment should open and the information entered in the checkbox question should still be there |  |  |  |
|  | Check the other question (which should be a Text question).  | It should have a field for **Assessor’s Comments**, a **Guidance for the Examiner** note and a **Score** field |  |  |  |
|  | As the *examiner*, add a disapproving note of the performance of the *candidate* in the field, **Assessor’s Comments** | Text entered should appear in the field, **Assessor’s Comments** |  |  |  |
|  | Add image | For the sake of the exercise, you can use the same image used in making the template, for the question with a field, **You can upload files here** |  |  |  |
|  | Click in the **Score** field and enter the value “0” | The number “0” should display under **Score** |  |  |  |
|  | Click the **Submit** button | You should see the information message **Assessment Completed**; in this example, the minimum score of 2 points should have been reached and the candidate should have passed their assessment |  |  |  |
|  | Click the **Close** button | The test lightbox should be closed |  |  |  |
|  | Click the **Logout** option in the top right corner | You should be logged out of iPassport |  |  |  |
| STAFF PROFILES-ASSESSMENT TAB | Login as your alternative user (*candidate*) | You should be logged in |  |  |  |
|  | Hover over the **Personnel Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu  | The **Staff Profiles** item should be highlighted  |  |  |  |
|  | Click the **Staff Profiles** item | The **Search Staff** tab should be displayed |  |  |  |
|  | Start typing the name of the *candidate* in the **Search** field | The list below should start filtering down to your search |  |  |  |
|  | Open the candidate’s profile by clicking their name in the search results area | The candidate’s profile should open on the **General** tab |  |  |  |
|  | Hover over the tab, **Assessments** | The **Assessments** item should be highlighted and it should have a number in parentheses |  |  |  |
|  | Click the **Assessments** item | A list of assessments taken by the candidate should appear, including the one just completed |  |  |  |
|  | Click the row of the assessment template just completed | Details of the assessment, the score and the comments added by the examiner under each question should be displayed; the images used should appear as links in the **Attachments** section |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 12th October 2018 | Document created |
| v1.1 | 22nd November 2018 | Added step for field, “Automatically re-issue the test” in Reissue Settings |
| v1.2 | 13th February 2020 | Updated to clarify process and to reflect current user interface |
| v1.3 | 23rd July 2021 | Updated to include ‘Save Progress’ |