**Validation Details**

This validation test covers the Equipment module in iPassport.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: N/A

Changes to this area of iPassport:

N/A

**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.*

*This test creates new equipment records, access to more than one OU is not required. If you have access to more than one OU simply choose the required OU for this test.*

*The time logged in iPassport should match your computer.*

*This validation document uses GMT if your account is set to a different time then please make the required time adjustments.*

*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** |
| --- | --- | --- | --- | --- | --- |
| Menu | Hover over the **Laboratory Records** main menu | The sub-menu should be displayed |  |  |  |
|  | Click the **Equipment** option | The **Search Equipment** tab should be displayed |  |  |  |
| New Equipment | Click in the **New Equipment** tab | The **Create Equipment for….** screen should be displayed |  |  |  |
|  | Click the **Organisational Units** field | The field should expand and list all the OUs you have the ability to add a change control to  *Note: If you only have access to one OU this option is not displayed, simply proceed to the Name area of this test* |  |  |  |
|  | Select an OU | The OU should appear in the field |  |  |  |
|  | Click in the **Name** field | The cursor should appear in the field |  |  |  |
|  | Enter a name | The text should be visible in the field |  |  |  |
|  | Click in the **Code** field | The cursor should appear in the field |  |  |  |
|  | Enter a code | The text should be visible in the field |  |  |  |
|  | Click the spanner icon associated with the **Equipment Type** field | The **Equipment Type** lightbox should be displayed |  |  |  |
|  | Click the **Add Equipment Type** option | The **Create Equipment Type** area should be displayed |  |  |  |
|  | Click in the **Name** field | The cursor should be visible in the field |  |  |  |
|  | Enter a name for your equipment type | The text should be visible in the field |  |  |  |
|  | Click the **Create Equipment Type** button | You should be returned to the **Equipment Types** list |  |  |  |
|  | Check the list | You should see your new equipment type listed |  |  |  |
|  | Check the **Actions** column | You should see pencil (edit) and dustbin (delete) icons |  |  |  |
|  | Click the pencil icon | The **Edit Equipment Type** area should be displayed |  |  |  |
|  | Click in the **Name** field | The cursor should be visible in the field |  |  |  |
|  | Select the text in the field | The text should be selected |  |  |  |
|  | Delete the text | The text should be deleted and the field should be empty |  |  |  |
|  | Click the **Save Equipment Type** button | A warning message should be displayed |  |  |  |
|  | Click the **Cancel** button | You should be returned to the **Equipment Types** list |  |  |  |
|  | Check the list | You should see your new equipment type listed |  |  |  |
|  | Click the cross/ close icon for the lightbox | The lightbox should close and you should be returned to the **Create Equipment for….** screen |  |  |  |
|  | Check the **Equipment Type** field | Your newly created equipment type should be visible in the field |  |  |  |
|  | Click in the **User Responsible** field | The cursor should be visible in the field |  |  |  |
|  | Start to type your name/ primary user name | The field should filter down |  |  |  |
|  | Click your name/ primary use name | The name should be displayed in the field |  |  |  |
|  | Click in the **Description** field | The cursor should be visible in the field |  |  |  |
|  | Add a short description of the equipment  *Note: This description is going to be used later for searching, for the purposes of this test ensure it is a word that could be easily recalled and is unlikely to be in another other record or document* | The text should be visible in the field |  |  |  |
|  | Click the **Next Step** button | You should be taken to the **Step 2 of 4** screen |  |  |  |
|  | Check the fields | You should see the Storage Location(s) and Usage Location(s) fields |  |  |  |
|  | Click the **Next Step** button  *Note: You cannot add new locations from this area, as such the fields could be populated or could be empty at this time* | You should be taken to the **Step 3 of 4** screen |  |  |  |
|  | Click the **Date Received** field | A calendar icon should be visible |  |  |  |
|  | Select one year ago today | The date should be visible in the field |  |  |  |
|  | Click the **Estimated Replacement Date** field | A calendar icon should be visible |  |  |  |
|  | Select one year from today | The date should be visible in the field |  |  |  |
|  | Click in the **Estimated Replacement Cost** field | The cursor should be visible in the field |  |  |  |
|  | Add a cost for the replacement of 1000 | The value should be visible in the field |  |  |  |
|  | Click the **Next Step** button | You should be taken to the **Step 4 of 4** screen |  |  |  |
|  | Click the **Date Installed** field | A calendar icon should be visible |  |  |  |
|  | Select a date six months ago today | The date should be visible in the field |  |  |  |
|  | Click the **Date Released Into Use** field | A calendar icon should be visible |  |  |  |
|  | Select a date 3 months ago today | The date should be visible in the field |  |  |  |
|  | Click the **Create Equipment** button | The equipment record should be created and you should be taken to the **General** tab |  |  |  |
|  | Check the **Name** field | This should show the name of the equipment entered earlier |  |  |  |
|  | Check the **Code** field | This should show the code of the equipment entered earlier |  |  |  |
|  | Check the **Equipment Type** field | This should show the newly created equipment type |  |  |  |
|  | Click the pencil edit icon for the field | The field should open and you should see a scroll down list, the spanner icon, a **Save** button and a **Cancel** button |  |  |  |
|  | Click the spanner icon | You should be taken to the **Equipment Type** lightbox |  |  |  |
|  | Click the cross/ close icon for the lightbox | You should be returned to the General tab and the **Equipment Type** field should still be open |  |  |  |
|  | Click the **Cancel** button | The **Equipment Type** field should close |  |  |  |
|  | Check the **User Responsible** field | This should show your name/ your primary user name |  |  |  |
|  | Check the **Description** field | This should show the description you entered earlier |  |  |  |
|  | Click the **Delivery** tab | The delivery tab should be displayed |  |  |  |
|  | Check the **Date Received** field | This should display the date one year ago today |  |  |  |
|  | Check the **Estimate Replacement Date** field | This should display the date one year from today |  |  |  |
|  | Check the **Estimated Replacement Cost** field | This should show “1000” |  |  |  |
|  | Click the **Install** tab | The install tab should be displayed |  |  |  |
|  | Check the **Date Installed** field | This should display the date 6 months ago today |  |  |  |
|  | Check the **Date Released Into Use** field | This should display the date 3 months ago today |  |  |  |
| Searching for equipment records | Click the **Search Equipment** tab | The equipment search area should load |  |  |  |
|  | Click in the **Search** field | The cursor should be visible in the field |  |  |  |
|  | Start to type the name of your newly created equipment record | The search results should filter down and you should be able to see your equipment listed |  |  |  |
|  | Check the equipment name | The portion you typed should be highlighted |  |  |  |
|  | Click the equipment name in the list | You should be taken to the **General** tab of the equipment record |  |  |  |
|  | Click the **back** button in the header area of the record | You should be returned to the **Search Equipment** tab with the search results still visible |  |  |  |
|  | Click in the **Search** field | The cursor should be visible in the field |  |  |  |
|  | Delete the text in the field | The text should be removed, and the search list should filter again |  |  |  |
|  | Click the **Type** field | The field should expand and show the available options |  |  |  |
|  | Check the options | You should see your previously created type |  |  |  |
|  | Select your previously created equipment type | The equipment type should be visible in the field and the search results should filter down to your newly created equipment record |  |  |  |
|  | Click the **Search Equipment** tab | The tab should reload, and the filters should be reset |  |  |  |
|  | Click the **Advance Search** bar | The advanced search area should now be visible, and the bar name should have changed to **Hide Advanced Search** |  |  |  |
|  | Click the **Date** field | The field should expand and provide date options |  |  |  |
|  | Select **Received** from the list | The option should be populated in the field |  |  |  |
|  | Click the **is after** field | A calendar icon should be visible |  |  |  |
|  | Select the date one year and a day before today’s date | The date should be visible in the field and the search result should filter |  |  |  |
|  | Check the search results | You should be able to see your newly created equipment record |  |  |  |
|  | Click in the **is after** field | The cursor should be visible in the field |  |  |  |
|  | Delete the date | The date should be deleted, and the search results should filter again |  |  |  |
|  | Click in the **is before** field | A calendar icon should be visible |  |  |  |
|  | Select the date of one year minus one day before today’s date | The date should be visible in the field and the search result should filter |  |  |  |
|  | Click in the **is before** field | The cursor should be visible in the field |  |  |  |
|  | Delete the date | The date should be deleted, and the search results should filter again |  |  |  |
|  | Click the **Date** field | The field should expand |  |  |  |
|  | Select the **Replacement Date** option | This option should be displayed in the field |  |  |  |
|  | Click the **is before** field | A calendar icon should be visible |  |  |  |
|  | Select the date one year minus one day in the future | The date should be visible in the field and the search result should filter |  |  |  |
|  | Check the search results  *Note: There may not be any* | You should not be able to see your newly created equipment record |  |  |  |
|  | Click the **is before** field | A calendar icon should be visible |  |  |  |
|  | Select the date a year today | The date should be visible in the field and the search result should filter |  |  |  |
|  | Check the search results | You should be able to see your equipment record |  |  |  |
|  | Click the **Search Equipment** tab | The tab should reload, and the filters should be reset |  |  |  |
|  | Click in the **Search** field | The cursor should be visible in the field |  |  |  |
|  | Type a word from your description in the field | The text should be visible in the field |  |  |  |
|  | Check the search results | You should not be able to see the equipment record listed  *Note: If you have used the same word in the name or code then the equipment record would be visible, this would be expected* |  |  |  |
|  | Click the global **Search** in the left quick access bar | The **Search** area should be visible |  |  |  |
|  | Enter the word in the search field | The text should be visible in the field |  |  |  |
|  | Hit return on your keyboard or the magnifying glass in the field | The search results should be displayed |  |  |  |
|  | Check the results | You should be able to see your equipment record  *Note: If you have used a generic word there might be multiple results which are not just equipment, this is to be expected* |  |  |  |
|  | Click the entry for your equipment record | You should be taken to the **General** tab of the equipment record |  |  |  |
|  | Click the cross/ close icon in the global **Search** area | The search area should be hidden |  |  |  |
| Usage | Click the **Usage** tab | The **Usage** tab should load |  |  |  |
|  | Check the **Check In/ Out** area | Should be able to see an **Action** field |  |  |  |
|  | Check the **Action** field | This should be defaulted to **Check Out** |  |  |  |
|  | Click in the Filter area for of the **Responsible Person** field | The cursor should be visible in the field |  |  |  |
|  | Start to type the name of your alternative user | The list should filter down |  |  |  |
|  | Select your alternative user | They should be selected |  |  |  |
|  | Click in the **Estimated Return Date** field | A calendar icon should be visible |  |  |  |
|  | Click the date for tomorrow | The date should be visible in the field |  |  |  |
|  | Click in the **Comments** field | The cursor should be visible in the field |  |  |  |
|  | Enter a comment | The text should be visible in the field |  |  |  |
|  | Click the **Check Out** button | The header area should display that the item is now **Checked Out** and the **Log** area should show the checkout log |  |  |  |
|  | Click the **Search Equipment** tab | The tab should reload, and the filters should be reset |  |  |  |
|  | Click in the **Search** field | The cursor should be visible in the field |  |  |  |
|  | Enter the name of your equipment record | The text should be visible, and the search results should filter down |  |  |  |
|  | Check the name area in the search results | This should show **Checked Out – Due Back…** |  |  |  |
|  | Click on the name of the equipment | You should be taken to the **General** tab of the equipment record |  |  |  |
|  | Click the **Usage** tab | The **Usage** tab should load |  |  |  |
|  | Click the **Check In** button | The header message should be removed and the **Log** should show the check in |  |  |  |
|  | Check the Status of the latest log entry | This should show **Checked In** |  |  |  |
|  | Check the **Date** for the latest entry | This should show todays date and time |  |  |  |
|  | Check the **Comments** field for the latest log entry | This should be empty |  |  |  |
|  | Click the **back** button in the header area | You should be returned to the search results |  |  |  |
| Equipment Import | Click the **Import Equipment** tab | The import equipment tab should load |  |  |  |
|  | Check **Step 1** | There should be a “…**click here**…” option |  |  |  |
|  | Click the “…**click here**…” option | A csv template document should be downloaded  *Note: The exact circumstances of the download might differ between operating systems and set-up* |  |  |  |
|  | Open the CSV template document | - - - - - - |  |  |  |
|  | Check the first column in the CVS template | This should be **OU** |  |  |  |
|  | Click into the first available field in the **OU** column | The cursor should be visible in the field  *Note: This is outside the control of iPassport* |  |  |  |
|  | Add the exact name of your OU | The name should be visible in the cell  *Note: This is outside the control of iPassport* |  |  |  |
|  | Check the second column in the CSV template | This should be **Name** |  |  |  |
|  | Click into the first available field in the **Name** column | The cursor should be visible in the field  *Note: This is outside the control of iPassport* |  |  |  |
|  | Add a name for your new equipment record | The name should be visible in the cell  *Note: This is outside the control of iPassport* |  |  |  |
|  | Check column e in the CSV template | This should be **Equipment Type** |  |  |  |
|  | Click into the first available field in the **Equipment Type** column | The cursor should be visible in the field  *Note: This is outside the control of iPassport* |  |  |  |
|  | Add the exact name of your new equipment type  *Note: This needs to be exact so you may wish to check iPassport for this* | The name should be visible in the cell  *Note: This is outside the control of iPassport* |  |  |  |
|  | Save the file as a CSV file to a known and easily accessible location  *Note: It is recommended you use the CSV format Unicode (UTF-8)*  *It is also possible to Save As and overwrite the existing download* | - - - - - - |  |  |  |
|  | Return to iPassport | - - - - - - |  |  |  |
|  | If you have navigated away from the **Import Equipment** tab return there | - - - - - - |  |  |  |
|  | Click the “**Click here…**” field in **Step 2** | A browser window should be displayed  *Note: The type of browser window depends on your OS and set-up* |  |  |  |
|  | Locate your file | - - - - - - |  |  |  |
|  | Select this | You should see iPassport load this and **Step 3** should be displayed |  |  |  |
|  | Check **Step 3** | There should be a message listed under the **Error** column |  |  |  |
|  | Check the message | It should say “**Please set either “Yes” or “No” under Capital…**”  *Note: Capital equipment field is required for the import as detailed in the user guide, this is not show on the step-by-step process as it is defaulted to capital* |  |  |  |
|  | Open the CSV file again | - - - - - - |  |  |  |
|  | Check column **I** | This should be **Capital Equipment** |  |  |  |
|  | Click into the first available field in the **Capital Equipment** column | The cursor should be visible in the field  *Note: This is outside the control of iPassport* |  |  |  |
|  | Add No to the cell  *Note: This needs to be exact so you may wish to check iPassport for this* | The text should be visible in the cell  *Note: This is outside the control of iPassport* |  |  |  |
|  | Save the file as a CSV file to a known and easily accessible location  *Note: It is recommended you use the CSV format Unicode (UTF-8)*  *It is also possible to Save As and overwrite the existing download* | - - - - - - |  |  |  |
|  | Return to iPassport | - - - - - - |  |  |  |
|  | If you have navigated away from the **Import Equipment** tab return there | - - - - - - |  |  |  |
|  | Click the “**Click here…**” field in **Step 2** | A browser window should be displayed  *Note: The type of browser window depends on your OS and set-up* |  |  |  |
|  | Locate your file | - - - - - - |  |  |  |
|  | Select this | You should see iPassport load this and **Step 3** should be displayed |  |  |  |
|  | Check **Step 3** | You should see “**No Errors found…**” and **Step 4** should be displayed |  |  |  |
|  | Check Step 4 | You should see the **Import Equipment** button |  |  |  |
|  | Click the **Import Equipment** button | Step 4 should be updated with details of the equipment loaded |  |  |  |
|  | Click the **Search Equipment** tab  *Note: If you have access to more than one OU please select your OU first* | The search screen should be displayed |  |  |  |
|  | Click the **Type** field | The options available should be displayed |  |  |  |
|  | Select your equipment type | The search results should filter down to your two equipment records |  |  |  |
|  | Click the name of your imported equipment record | The equipment record should load on the **General** tab |  |  |  |
|  | Check the **Capital Equipment** field | This should show “…**NOT Capital**…” |  |  |  |
|  | Click the **Changelog** tab | This should show one entry |  |  |  |
|  | Check the entry | This should show it was uploaded by you/ primary user today |  |  |  |
|  | Check the time against the entry | This should match the time of the upload/ your computer  *Note: Depending on how long the last few steps took this might differ by a couple of minutes* |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 23rd August 2021 | Document released |
| v1.0 | 14th September 2021 | Typo correction – no revision required |