**Validation Details**

This validation test covers management of gender and salutation lists in staff profiles within iPassport.

**Changes between iPassport versions:**

Current version: v3.5.1

Previous version: v3.4.1

Changes to this area of iPassport:

Home OU is now taken more into account for GDPR purposes and the interface has evolved since the last version.

**Pre-requisites:**

Administration access IS required for this test. Access to the **Personnel Management** main menu is also required.

This process edits an existing **staff profile**; to complete the validation test you need two user accounts.

Your primary user should have access to the **Personnel Management** area of the system. More specifically, the permissions, *Contacts: Edit Salutations*, *Contacts: Delete Salutations*, and *Genders: Can Manage Genders*.

(NOTE: Members of the user group, “Validation” in the freely accessible *Validation* account (<https://validation.ipassportqms.com/)>, have these permissions. Please contact [support@genialcompliance.com](mailto:support@genialcompliance.com) if you require credentials to log in.)

IMPORTANT General Data Protection Regulation UPDATE (v3.5.1):

Your primary user must have the role, *Administration Editor*(in addition to general viewer access to the Personnel Management area)

in the OU of the secondary user to be able to view their personal details when they allow it.

The secondary user can have simple ‘viewer’ privileges. The exercise includes adjusting visibility of this user’s personal information to allow access to the primary user.

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.

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 the primary user) | - - - - - - |  |  |  |
| Menu | Click the **My** **Profile** icon in the left sidebar menu | The **User Details** tab should load |  |  |  |
| My Profile | Click the **View** **My Staff Profile** link | The staff profile should load for the logged in user on the **General** tab |  |  |  |
|  | Scroll down to **Salutation** | There should be a pencil edit icon under **Salutation** |  |  |  |
|  | Click the pencil edit icon under **Salutation** | The field should expand |  |  |  |
|  | Click in the field and check the items in the dropdown menu | There should be several salutations |  |  |  |
|  | Click the **spanner** icon to the left of the **Save** button | A lightbox titled **Salutations** should open |  |  |  |
|  | Click **Add Salutation** | The lightbox should expand for a **Create Salutation**section with the cursor visible in the **Salutation** textbox |  |  |  |
|  | Type in a new salutation | Your text should appear in the box |  |  |  |
|  | Click **Create Salutation** | The lightbox should shrink down to show the list of added salutations |  |  |  |
|  | Check the Actions column to the right of your new salutation | You should see a *bin/trash* **delete** icon next to the *pencil* **edit** icon (because it isn’t in use) |  |  |  |
|  | Click the bin/trash **Delete** icon | Your new salutation should disappear |  |  |  |
|  | Add your salutation again as above | Your new salutation should appear on the list again |  |  |  |
|  | Click the **X** on the top right of the **Salutations** lightbox | Your new salutation should show in the **Salutation** text box |  |  |  |
|  | Select a different salutation from the dropdown menu and Click **Save** | Your selection should show under **Salutation** |  |  |  |
|  | Click the pencil **edit** icon under **Gender** | The field should expand |  |  |  |
|  | Check the items in the drop down | There should be several genders |  |  |  |
|  | Click the **spanner** icon to the left of the **Save** button | A lightbox titled **Genders** should open |  |  |  |
|  | Click **Add Genders** | The lightbox should expand for a **Create Genders**section with the cursor visible in the **Name** textbox |  |  |  |
|  | Type in a new gender name | Your text should appear in the box |  |  |  |
|  | Click **Create Genders** | The lightbox should shrink down to show the list of added genders |  |  |  |
|  | Check the Actions column to the right of your new gender name | You should see a *bin/trash* **delete** icon next to the *pencil* **edit** icon (because it isn’t in use) |  |  |  |
|  | Click the bin/trash **Delete** icon | Your new gender name should disappear |  |  |  |
|  | Add your gender name again as above | Your new gender name should appear on the list again |  |  |  |
|  | Click the **X** on the top right of the **Genders** lightbox | Your new gender should show in the **Gender** text box |  |  |  |
|  | Select any gender from the dropdown menu and Click **Save** | Your selection should show under **Gender** |  |  |  |
|  | Click **Logout** | You should be logged out |  |  |  |
|  | Login as a secondary user | You should be logged in |  |  |  |
|  | Click the **My** **Profile** icon in the left sidebar menu | The user’s profile should open under the **User Details** tab |  |  |  |
| Adjust Personal Information Visibility | Click the **View** **My Staff Profile** link | The user’s personal details should open under the **General** tab |  |  |  |
|  | Check the information message in the middle of the screen | You should see “You have control over who can view certain personal information stored about you in iPassport…” |  |  |  |
|  | Check under the information message | There should be a field called **Restrict visibility of these fields to** field |  |  |  |
|  | Click the pencil edit icon for the**Restrict visibility of these fields to** field | The field should expand |  |  |  |
|  | Check the items in the drop down | There should be four items |  |  |  |
|  | Select the **Site Administrators and Key users in my OU** option | The **Site Administrators and Key users in my OU** option should be displayed in the field |  |  |  |
|  | Click the **Save** button | **Site Administrators and Key users in my OU** should be displayed |  |  |  |
| Adjust Personal Information | Scroll down and click the pencil **edit** icon under **Gender** | The field should expand |  |  |  |
|  | Check the items in the drop down | The new gender name created above should be listed |  |  |  |
|  | Select a gender for this user and click **Save** | The gender selected should appear under **Gender** |  |  |  |
|  | Click **Logout** | You should be logged out |  |  |  |
|  | Login as the primary user | You should be logged in |  |  |  |
|  | Hover over the **Personnel Management** menu item | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu item | The **Staff Profiles** sub-menu item should be highlighted |  |  |  |
|  | Click the **Staff Profiles** sub-menu | The **Search Staff** tab should open |  |  |  |
|  | Click in the **Home OU** field | A dropdown list of OUs should appear |  |  |  |
|  | Select the secondary user’s home OU | The selected OU should display in the field |  |  |  |
|  | Click in the **Search** textbox | The cursor should be visible in the textbox |  |  |  |
|  | Start typing the name of the secondary user in the **Search** field | The list below should start filtering down to your search |  |  |  |
|  | Click the name of your secondary user when it appears below | The user’s staff profile should open |  |  |  |
|  | Scroll down and click the pencil **edit** icon under **Salutation** | The field should expand |  |  |  |
|  | Click in the field and check the items in the dropdown menu | The new salutation name created above should be listed |  |  |  |
|  | Select a salutation for this user, different from the one you created and click **Save** | The salutation selected should appear under **Salutation** |  |  |  |
|  | Click the pencil **edit** icon under **Salutation** again | The field should expand |  |  |  |
|  | Click the **spanner** icon to the left of the **Save** button | A lightbox titled **Salutations** should open |  |  |  |
|  | Check the Actions column to the right of your new salutation | You should see a *bin/trash* **delete** icon next to the *pencil* **edit** icon (because it isn’t in use) |  |  |  |
|  | Click the bin/trash **Delete** icon | Your new salutation name should disappear |  |  |  |
|  | Click the **X** on the top right of the **Salutations** lightbox | The **Salutation** text box should be blank |  |  |  |
|  | Click **Cancel** to close the field | The salutation selected above should display again |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 15th October 2018 | Document created |
| v1.1 | 14th February 2020 | Updated to reflect current home OU functionality and interface |
| v1.2 | 14th May 2020 | Clarification of General Data Protection Regulation UPDATE (v3.5.1) requirements |