**Validation Details**

This validation test covers creating a new general incident within iPassport. The process includes creating a new ‘Location’ and a new ‘Contact’ within the incident report.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: v3.2.0

Changes to this area of *iPassport*: Aesthetic changes, core functionality has not changed.

**Pre-requisites:**

Administration access and ‘Global Editor’ privileges are required by the user running this test. No additional users are required.

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

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

All names such as menu items and sub-menu items will be displayed in bold, for example **Noticeboard.**

This test starts from within *iPassport*, signed in as a user with the permissions described above.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| Menu structure | Hover over the **Laboratory Records** main menu item | The sub-menu should be displayed |  |  |  |
|  | Highlight the **Incident Reports** option | This area of the sub-menu should be highlighted |  |  |  |
|  | Click the **Incident Reports** option | The **Search Incident Reports** tab should be displayed |  |  |  |
| Creating a new incident | Click the **New Incident Report** tab  | One field should be displayed, the **Organisational Unit**  |  |  |  |
|  | Select an OU to add the incident to. | The OU name should be displayed in the **Organisational Unit** field. **Select Incident Type** should now appear |  |  |  |
|  | Select the incident type of **General Incident** | **General Incident** should be displayed in the **Select Incident Type** field and the screen should refresh to **Overview** (new incident) should be displayed |  |  |  |
|  | Scroll down and click the **Save** button | A warning should be displayed informing you there are four required fields. |  |  |  |
|  | Enter a **Title** | Text should be displayed in the **Title** field |  |  |  |
|  | Click the **Date Of Report** field | The calendar should be displayed |  |  |  |
|  | Select the day before the validation day | The date should be shown in the **Date of Report** field. |  |  |  |
|  | Click the **Date Of Incident** field | The calendar should be displayed |  |  |  |
|  | Select two days before the validation date | The date should be shown in the **Date Of Incident** field. |  |  |  |
|  | Click the spanner icon for the **Incident Category** field | The incident category lightbox should be displayed |  |  |  |
|  | Click the **Add Incident Report General Category** option | The area should expand to display the field, **Name** |  |  |  |
|  | Enter a new incident category in the **Name** field | The details should be visible in the **Name** field |  |  |  |
|  | Click the **Create Incident Report General Category** button | The new incident category should now be visible in the lightbox list |  |  |  |
|  | Exit the lightbox using the ‘X’ button in the top right corner of the lightbox | Should be returned to the incident you were working on |  |  |  |
|  | Check the **Incident Category** field | The new incident category should be displayed here |  |  |  |
|  | Click the **(+)** button against **Incident Location** | The **Create New Location** lightbox should be displayed |  |  |  |
|  | Check the details | There should be two required fields |  |  |  |
|  | Scroll down and click **Create Location** | A warning message should be displayed informing you there are two required fields |  |  |  |
|  | Add a new **Short Name** and **Long Name** (make a note of these) | The details should be visible in the respective fields |  |  |  |
|  | Click the **Create Location** button | Should be returned to the incident you were working on |  |  |  |
|  | Check the **Incident Location** field | The new incident should be displayed here |  |  |  |
|  | Click in the **Description** field | The cursor should be entered into the **Description** field |  |  |  |
|  | Add a description | The text should be displayed in the **Description** field |  |  |  |
|  | In **Who Reported the Incident?** Click the **Add new person** button | The field should expand and reveal 12 new fields to complete |  |  |  |
|  | Click the **Create** button | A warning message should be displayed informing you the first name and last name cannot be blank |  |  |  |
|  | Ok this message | You should be returned to the new person fields |  |  |  |
|  | Add details to the **First name** and **Last name** fields (make a note of the name) | The details should be visible in the respective fields |  |  |  |
|  | Click the **Create** button | The new contact should be visible |  |  |  |
|  | Check the **Who Reported the Incident** area | There should now be two more options visible:**Select a different person** and **Edit this person** |  |  |  |
|  | Enter the first name of the newly added contact into the **Search for First Aider** field | The contact should be displayed below the message, **Please select the correct person from the list below** |  |  |  |
|  | Hover over the name | This should be highlighted |  |  |  |
|  | Click the name | The person should be added as the first aider |  |  |  |
|  | Click the **Edit this person** option | The contact record should be displayed |  |  |  |
|  | Click **Cancel** | The contact name should be displayed again in the **First Aider** field |  |  |  |
|  | Click the **Type** field under the **Injured Person** heading | 6 options should appear in a dropdown list |  |  |  |
|  | Select the type, *Visitor* | The selected type should be displayed in the field |  |  |  |
|  | Click the **Add New Person** in the **Injured Person** field | The field should expand and reveal 13 new fields to complete (including Type) |  |  |  |
|  | Click the **Cancel** button | The fields should be closed again |  |  |  |
|  | Click the spanner icon against the **Type of Accident/ Incident** field under the heading on **Incident/ Accident Details** | The **Incident Report Sub Categories** lightbox should be displayed |  |  |  |
|  | Click the **Add Incident Report Sub Categories** option | The **Create Incident Report Sub Category** should be displayed, the **Name** field should be visible |  |  |  |
|  | Add a new name in the **Name** field | The text should be displayed in the **Name** field |  |  |  |
|  | Click the **Create Incident Report Sub Category** button | The new sub category should be displayed in the **Incident Report Sub Categories** list |  |  |  |
|  | Click the ‘X’ button in the top right corner of the lightbox | You should be returned to the incident form |  |  |  |
|  | Check the **Type of Accident/ Incident** field | The newly created type should be displayed in the field |  |  |  |
|  | Click the **Describe Injuries** field | The cursor should be displayed here |  |  |  |
|  | Click the **Absence start date** field | The calendar should be displayed |  |  |  |
|  | Click the **Absence end date** field | The calendar should be displayed |  |  |  |
|  | Click the **Save** button | The incident should be created and you should be taken to the **General** tab |  |  |  |
| Newly created incident | Check the **Incident Location** | This should show the newly added incident (earlier step) |  |  |  |
|  | Click the pencil/ edit icon | The drop down list should be displayed |  |  |  |
|  | Click the **Cancel** button | You should be returned to the **General** tab and the edit options should be hidden again |  |  |  |
| Newly created contact record | Hover over the **Laboratory Management** main menu item | The sub-menus should be displayed |  |  |  |
|  | Hover over the **Contacts** option | This should be highlighted |  |  |  |
|  | Click the **Contacts** option | This should open onto the **Search Contacts** tab |  |  |  |
|  | Enter the first name of the newly created contact into the **Search** field | The contact should be displayed |  |  |  |
| Newly created location | Hover over the **Administration** menu | The sub-menus should be displayed |  |  |  |
|  | Hover over the **Locations** option | This should be highlighted |  |  |  |
|  | Click the **Locations** option | This should open onto the **Search Locations** tab |  |  |  |
|  | Type the recently added location name in the **Search** field  | The recently added location should appear listed below |  |  |  |
|  | Click anywhere in the row of the new location | The location should be loaded on the **General** tab |  |  |  |
|  | Scroll down to the **OUs & Tags** section | The **OUs & Tags** area should appear at the bottom of the page |  |  |  |
|  | Check the **Organisational Unit** field | This should show the OU where the new incident was created |  |  |  |
|  | Check the **Tags** field | The tags, *‘Incident Report’* and *‘Print’* should be listed |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.1 | 5th September 2016 | Adjusted **Add New Person** in the **Injured Person** field to help show where it is |
| v1.1 | 5th September 2016 | Added field count of 13 to the new injured person area |
| v1.2 | 2nd March 2017 | Removed the spanner item from the location |
| v1.2 | 17th March 2017 | Changed Recent tab to Search Locations and removed click Search step |
| v1.3 | 4th February 2021 | Updated to reflect current interface |