**Validation Details**

This validation test covers setting a Home OU for staff members and limiting visibility of leave/ illness information in staff profiles within iPassport.

**Changes between iPassport versions:**

Current version: v3.4.1

Previous version: N/A

Changes to this area of iPassport: No changes, this is new to v3.4.1 of iPassport

**Pre-requisites:**

Administration access IS required for this test to manage alternate users’ OU scope before starting. You require access to several users for this test; the primary user requires global administration rights, while the alternate users must have Personnel Management Editor rights within different OUs. They should have Leave Entitlement set.

This process edits existing **staff profiles**; to complete the validation test you need to have multiple user accounts to ensure that the restriction is correctly in place.

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

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.

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 alternate user) | - - - - - - |  |  |  |
| Menu | Click the **Profile** option in the header | The User Details tab should load |  |  |  |
| MyProfile | Click the **View My Staff Profile** link  | The staff profile should load for the logged in user on 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 **Site Administrators and Key users in my OU** | The text should be visible |  |  |  |
|  | Click **Save** | The field should close and the **Site Administrators and Key users in my OU** option should be displayed |  |  |  |
| Request Leave | Click the **Leave** tab in the menu under the user’s name | The tab should open to **Leave for this period** |  |  |  |
|  | Click **Request Leave** | The area should expand to **Request Leave for** … (your user) |  |  |  |
|  | Click inside the textbox next to **Start** | A calendar tool should open |  |  |  |
|  | Select a date in the future | The date should be displayed in the textbox |  |  |  |
|  | Click inside the textbox next to **End** | A calendar tool should open |  |  |  |
|  | Select a date in the future, equal to or beyond the Start date | The date should be displayed in the textbox |  |  |  |
|  | Click inside the textbox under **Leave Type** to expand the dropdown menu | A dropdown menu of several options should appear |  |  |  |
|  | Select **Holiday** | The text, “Holiday” should appear under **Leave Type** |  |  |  |
|  | Click **Save Leave Request** | The area should collapse and your request should appear under **Leave Pending** |  |  |  |
|  | Click the **Logout** option in the top right corner | You should be logged out of iPassport |  |  |  |
|  | Login in as your primary user | - - - - - - |  |  |  |
| View Leave | Hover over the **Personnel Management** menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu | The **Staff Profiles** sub-menu should be highlighted |  |  |  |
|  | Click the **Staff Profiles** sub-menu | The **Search Staff** tab should be displayed |  |  |  |
|  | Start to type the name of your secondary user (the one that requested leave) in the **Search** field | iPassport should start to filter down the results and show you your secondary user (depends on how many characters you entered) |  |  |  |
|  | Click the magnifying glass in the **Actions** column for your secondary user | You should be taken to the **General** tab of the staff record for your secondary user |  |  |  |
|  | Click the **Leave** tab in the menu under the user’s name | The tab should open to **Leave for this period** |  |  |  |
|  | Check the list under **Leave Pending** | Your alternate user’s leave request should be visible |  |  |  |
| Approve Leave | Hover over the **Personnel Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Absence** sub-menu  | The **Staff Absence** item should be highlighted  |  |  |  |
|  | Click the **Staff Absence** item | The **Leave Requests** tab should open |  |  |  |
|  | Look for your alternate user’s request | Your alternate user’s leave request should be visible; it should have a magnifying glass under the column Actions |  |  |  |
|  | Click the magnifying glass in the **Actions** column for your secondary user | A lightbox should appear with an **Approve Leave** button in the bottom right |  |  |  |
|  | Click the “X” on the top right of the lightbox to **close** it | You should be returned to the **Leave Requests** tab |  |  |  |
|  | Click the **Logout** option in the top right corner | You should be logged out of iPassport |  |  |  |
|  | Login as a second alternate user (with Personnel Mgmt. permissions in different OUs from the first alternate user) | - - - - - - |  |  |  |
| Check visibility | Hover over the **Personnel Management** menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu | The **Staff Profiles** sub-menu should be highlighted |  |  |  |
|  | Click the **Staff Profiles** sub-menu | The **Search Staff** tab should be displayed |  |  |  |
|  | Start to type the name of your first alternate user (the one who requested leave) in the **Search** field | iPassport should start to filter down the results and show you your secondary user (depends on how many characters you entered) |  |  |  |
|  | Click the magnifying glass in the **Actions** column for your secondary user | You should be taken to the **General** tab of the staff record for your secondary user, but neither the **Leave** or **Illness** tabs should be visible |  |  |  |
| Check if Approvable | Hover over the **Personnel Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Absence** sub-menu  | The **Staff Absence** item should be highlighted  |  |  |  |
|  | Click the **Staff Absence** item | The **Leave Requests** tab should open |  |  |  |
|  | Look for the first alternate user’s request | Your alternate user’s leave request should NOT be visible to the user signed in |  |  |  |
| MyProfile | Click the **Profile** option | The **Profile** should load on the **User Details** tab |  |  |  |
|  | Click the **View My Staff Profile** link | The **Staff Profile** should load on the **General** tab |  |  |  |
|  | Click the pencil edit icon for the **Restrict visibility of these fields to** field | The field should open |  |  |  |
|  | Select **Site Administrators and Key users in my OU** | The text should be visible |  |  |  |
|  | Click **Save** | The field should close and the **Site Administrators and Key users in my OU** option should be displayed |  |  |  |
| Set illness request | Hover over the **Personnel Management** menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu | The **Staff Profiles** sub-menu should be highlighted |  |  |  |
|  | Click the **Staff Profiles** sub-menu | The **Search Staff** tab should be displayed |  |  |  |
|  | Start to type the name of your second alternate user (currently logged in) in the **Search** field | iPassport should start to filter down the results and show you your user (depends on how many characters you entered) |  |  |  |
|  | Click the magnifying glass in the **Actions** column for your secondary user | You should be taken to the **General** tab of the staff record for your secondary user; the **Illness** tab should be visible |  |  |  |
|  | Click the **Illness** tab | The tab should open to, **Illness for this period**  |  |  |  |
|  | Click **Report Illness** | The area should expand to enter an illness report |  |  |  |
|  | Click inside the textbox by **Date/time of absence** | A calendar tool should open |  |  |  |
|  | Select a date in the recent past | The date should appear in the textbox |  |  |  |
|  | Click inside the textbox by **Expected return date/time** | A calendar tool should open |  |  |  |
|  | Select the same date as above | The date should appear in the textbox |  |  |  |
|  | Check the **Total Absence** amount | Depending on leave settings, it might read 8h or 24h |  |  |  |
|  | Adjust the times (dropdowns marked “All Day”) under the start and end dates, if necessary | Try to set the Total Absence to 8h |  |  |  |
|  | Click **Save Illness Report** | You should be returned to the **Illness** taband your illness should be listed under Previous Reported Illness |  |  |  |
|  | Click **Logout** | You should be logged out |  |  |  |
|  | Log back in as the first alternate user | - - - - - -  |  |  |  |
|  | Hover over the **Personnel Management** menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu | The **Staff Profiles** sub-menu should be highlighted |  |  |  |
|  | Click the **Staff Profiles** sub-menu | The **Search Staff** tab should be displayed |  |  |  |
|  | Start to type the name of the second alternate user (the one who reported an illness) in the **Search** field | iPassport should start to filter down the results and show your user (depends on how many characters you entered) |  |  |  |
|  | Click the magnifying glass in the **Actions** column for your second alternate user | You should be taken to the **General** tab of the staff record for your second alternate user, but neither the **Leave** or **Illness** tabs should be visible |  |  |  |
|  | Click the **Logout** option in the top right corner | You should be logged out of iPassport |  |  |  |
|  | Login in as your primary user | - - - - - - |  |  |  |
|  | Hover over the **Personnel Management** menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu | The **Staff Profiles** sub-menu should be highlighted |  |  |  |
|  | Click the **Staff Profiles** sub-menu | The **Search Staff** tab should be displayed |  |  |  |
| >>> | Start to type the name of your second alternate user (the one that reported an illness) in the **Search** field | iPassport should start to filter down the results and show you your second alternate user (depends on how many characters you entered) |  |  |  |
|  | Click the magnifying glass in the **Actions** column for your secondary user | You should be taken to the **General** tab of the staff record for your secondary user |  |  |  |
|  | Click the **Illness** tab in the menu under the user’s name | The tab should open to **Illness for this period** |  |  |  |
|  | Check the list under **Leave Pending** | Your second alternate user’s illness should be visible with Status, Pending Review |  |  |  |
|  | Hover over the **Personnel Management** menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Absence** sub-menu | The **Staff Absence** sub-menu should be highlighted |  |  |  |
|  | Click the **Staff Absence** sub-menu | The **Leave Requests** tab should be displayed |  |  |  |
|  | Click the **Reported Illnesses** tab | The **Reported Illnesses** tab should open and the second alternate user’s absence should be listed |  |  |  |
|  | Click the magnifying glass of your second alternate user’s illness | A lightbox titled, “**Illness report for”** should open |  |  |  |
|  | Click the **Mark Authorised** button | You should be returned to the **Reported Illnesses** page and the illness you just authorised should have disappeared from the list |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 16th October 2018 | Document created |