**Validation Details**

This validation test takes users’ Home OU into account for the purpose of limiting visibility of leave/illness information 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 to manage alternate users’ OU scope before starting. You require access to several users for this test; the primary user requires global administration rights (we’ll call, “**UserA**”); one secondary user (we’ll call, “**UserB**”), must have Personnel Management Editor rights within their own Home OU; another secondary user (we’ll call, “**UserC**”), must have Personnel Management Editor rights both within their own and *UserB*’s Home OUs.

*UserB* and *UserC* should have Leave Entitlement set (please refer to the [Leave Allowance](https://ipassport-docs.genialcompliance.com/user_guides/leave_management/#leave-allowance) section of the *Booking and Cancelling Leave* user guide).

(NOTE: Members of the user group, “Validation” in the freely accessible *Validation* account ([https://validation.ipassportqms.com/)](https://validation.ipassportqms.com/%29), have administration rights in most OUs. Please contact support@genialcompliance.com if you require credentials to log in.)

This process edits existing **staff profiles**; to complete the validation test you need to have multiple user accounts to confirm that access restrictions are 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.

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** |
| --- | --- | --- | --- | --- | --- |
| (*UserB* log in) | Log into iPassport as the first alternate user, *UserB* | - - - - - - |  |  |  |
| Menu | Click the **My** **Profile** icon in the left sidebar menu | 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 **Anyone with appropriate permissions to view them** | The text should be visible in the field |  |  |  |
|  | Click **Save** | The area should collapse and the **Anyone with appropriate permissions to view them** 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). |  |  |  |
| NOTE: If the message, “*It appears that you have no leave remaining.*” comes up, go to the **General** tab and check **Leave** field settings (please refer to the [Leave Allowance](https://ipassport-docs.genialcompliance.com/user_guides/leave_management/#leave-allowance) section of the *Booking and Cancelling Leave* user guide). |
|  | 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 the same date as the Start date | The date should be displayed in the textbox |  |  |  |
|  | Check the **Total Leave Requested** field in green | If the same Start and End date are chosen, it should equal ‘1 day’ |  |  |  |
|  | 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** |  |  |  |
| (*UserB* log out) | Click the **Logout** icon in the left sidebar menu | You should be logged out of iPassport |  |  |  |
| (*UserC* log in) | Login in as your secondary user, *UserC* | - - - - - - |  |  |  |
| 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 |  |  |  |
|  | Click in the **Home OU** field | A dropdown list of OUs should appear |  |  |  |
|  | Select secondary user, *UserB*’s home OU | The selected OU should display in the field |  |  |  |
|  | Start to type *UserB*’s name (who just requested leave) 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 to the **General** tab |  |  |  |
|  | 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 and click anywhere in the row | Your alternate user’s leave request should be visible and when clicked, a lightbox should appear with an **Approve Leave** button in the bottom right |  |  |  |
|  | Click **Approve Leave**  | The lightbox should disappear and the leave request should no longer be listed under the **Leave Requests** tab |  |  |  |
|  | Click the **Leave Summary** tab | The **Leave Summary** page should open |  |  |  |
|  | Click in the **User** field | A dropdown menu of users should appear |  |  |  |
|  | Type the first few letters of *UserB’s* first name | The first row to meet the string typed in will be selected |  |  |  |
|  | Click *UserB’s* name or hit enter when it appears selected | *UserB’s* name should appear in the field |  |  |  |
|  | Check the **Leave Booked** list below | The **Leave Booked** list should include *UserB’s* approved leave request |  |  |  |
| 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 on the **General** tab |  |  |  |
|  | Click the pencil edit icon for the **Restrict visibility of these fields to** field | The field should open |  |  |  |
|  | Select **Anyone with appropriate permissions to view them** | The text should be visible in the field |  |  |  |
|  | Click **Save** | The field should close and the **Anyone with appropriate permissions to view them** 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 the user logged in (*UserC*) in the **Search** field | The list below should start filtering down to your search |  |  |  |
|  | Click the in the row of *UserC* when it appears below | The user’s staff profile should open to the **General** tab |  |  |  |
|  | 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 - (1 day) |  |  |  |
|  | Click **Save Illness Report** | You should be returned to the **Illness** taband your illness should be listed under Previous Reported Illness |  |  |  |
| (*UserC* log out) | Click **Logout** | You should be logged out |  |  |  |
| (*UserB* log in) | Log back in as the first alternate user, *UserB* | - - - - - -  |  |  |  |
|  | 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 |  |  |  |
|  | Click in the **Home OU** field | A dropdown list of OUs should appear |  |  |  |
|  | Look for *UserC*’s home OU | The selected OU should not display in the dropdown menu |  |  |  |
|  | 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 |  |  |  |
|  | Click the **Reported Illnesses** tab | The **Reported Illnesses** tab should open |  |  |  |
|  | Look for the *UserC*’s illness report | *UserC*’s illness report should NOT be visible to the user signed in (*UserB*) |  |  |  |
| (*UserB* log out) | Click the **Logout** option in the top right corner | You should be logged out of iPassport |  |  |  |
| (*UserA* log in) | Login in as your primary user (*UserA*) | - - - - - - |  |  |  |
|  | 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 |  |  |  |
|  | Click in the **Home OU** field | A dropdown list of OUs should appear |  |  |  |
|  | Look for *UserC*’s home OU | The selected OU should display in the dropdown menu |  |  |  |
|  | Start to type *UserC*’s name (who reported an illness) in the **Search** field | The list below should start filtering down to your search |  |  |  |
|  | Click anywhere in *UserC’s* row when it appears below (except on the ‘person’ icon which links to the ‘User’ profile) | The user’s staff profile should open to the **General** tab |  |  |  |
|  | 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** | *UserC’s* illness report 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 *UserC’s* absence should be listed |  |  |  |
|  | Click the magnifying glass of *UserC’s* illness report | 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 |  |  |  |
|  | Click the **Staff Illness** tab | The **Staff Illness** page should open |  |  |  |
|  | Click in the filter area of the **Staff Members** filter | The cursor should be visible in the field |  |  |  |
|  | Start typing *UserC’s* first name | The results should narrow down as you type |  |  |  |
|  | Tick the checkbox by *UserC’s* name when it appears | *UserC’s* name should appear selected |  |  |  |
|  | Click **Search** | The reported illness just authorised should appear listed below; if the list is long, the **Illness start date** and **Illness end date** filters can be used to narrow the search |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 16th October 2018 | Document created |
| v1.1 | 27th March 2020 | Document updated to match current interface |