**Validation Details**

This validation test covers how to create and manage meetings in ***iPassport***.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: n/a

Changes to this area of iPassport: This validation test, released with version 3.6.0, includes recent improvements to the ‘Meetings’ module such as the ability to clone meetings and improved attendance handling.

**Pre-requisites:**

*‘Laboratory Management Editor’* permissions are required by the primary user (*User A*) performing the test; these permissions are also included in the *‘Global Editor’* roles. A secondary user (*User B*) with *‘Global Viewer’* / *‘Laboratory Management Viewer’* permissions is required as an attendee to the meeting which will be created in the process. A third user (*User C*) with similar permissions is required to confirm the privacy of the meeting. *User B* will be nominated as the *‘Chair Person’* and *User C* will be added as the *‘Note Taker’* but won’t be initially invited.

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

 *Emails are not delivered from the Validation account to prevent confusion with production account emails.*

This test follows the steps in the creation of a meeting, adding attendees, managing invitations, agenda and minutes. It also covers setting up recurring meetings and cloning existing ones.

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 *User A* | - - - - - - |  |  |  |
| Menu | Hover over the **Laboratory Management** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Meetings** sub-menu item  | The **Meetings** sub-menu item should be highlighted |  |  |  |
| Create Meeting record | Click the plus sign **[+]** next to the **Meetings** sub-menu item | The **New Meeting** tab should be loaded |  |  |  |
| NOTE: Some users in ‘enterprise’ accounts (which have facilities) will see a field to select in which facility the meeting record should be placed. |
|  | Click the field, **‘Name’** | The field should be shaded pink and the cursor should be blinking inside it |  |  |  |
|  | Enter a short recognisable name for the meeting | The name should display in the field and it should turn light blue |  |  |  |
|  | Click the field, **‘Date’** | A calendar should pop up |  |  |  |
|  | Select today’s date in the calendar | Today’s date should display in the field |  |  |  |
|  | Click the ‘H’ (hours) field under **‘Start Time’** | A dropdown menu of the day’s hours should appear |  |  |  |
|  | Select an hour later today | The selected hour should display in the ‘H’ field |  |  |  |
|  | Click the ‘M’ (minutes) field under **‘Start Time’** | A dropdown menu of the minutes in an hour should appear |  |  |  |
|  | Select a ‘minutes’ value to define the exact meeting time | The selected minutes should display in the ‘M’ field |  |  |  |
|  | Repeat the ‘H’ and ‘M’ selection under the field **‘Duration’** to set the length of the meeting | The duration of the meeting should display in hours and minutes |  |  |  |
| NOTE: The fields, **Location**, **Type** and **Status** can be left blank for this exercise. |
|  | Click the field, **‘Chair Person’** | The cursor should be blinking in the field |  |  |  |
|  | Start typing the name of *User B* for this role | A dropdown menu of matching names should appear |  |  |  |
|  | Click the name of the desired user when it appears in the dropdown menu | The selected user’s name should display in the field |  |  |  |
|  | Click the field, **‘Frequency’** | A dropdown menu of time periods should appear |  |  |  |
|  | Select the option, *‘Weekly’* | The selection should appear in the field |  |  |  |
|  | Click the field, **‘Note Taker’** | The cursor should be blinking in the field |  |  |  |
|  | Start typing the name of *User C* for this role | A dropdown menu of matching names should appear |  |  |  |
|  | Click the name of the desired user when it appears in the dropdown menu | *User C’s* name should display in the field |  |  |  |
|  | Skip the field, ‘CPD Points’, not relevant in this test | The field should remain blank |  |  |  |
| NOTE: The ‘*Chair Person’* and *‘Note Taker’* are not invited to the meeting by default nor do they receive notifications. When the meeting is private, they won’t be able to open it unless they are invited. |
|  | Click the field, **‘Privacy’** | A dropdown menu with two choices should appear |  |  |  |
|  | Select the option, ‘Only visible to attendees and owner’ | The selected option should display in the field |  |  |  |
|  | Click the field, **‘Meeting Purpose’** | The cursor should be blinking in the field |  |  |  |
|  | Enter a short description of the meeting’s purpose | The text entered should display in the field |  |  |  |
|  | Click the button, **Create Meeting** | The screen should refresh to show the new meeting record’s **General** tab |  |  |  |
| §§§ End of meeting record creation |  |  |  |  |  |
| NOTE: iPassport uses emails to notify invitees of a meeting. Since the Validation account doesn’t issue these emails, they are not considered in this test. It is necessary to assume that the users invited below know of the meeting. |
| §§§ |  |  |  |  |  |
| Send Invitations | Click the **‘Invitations(0/0)’** tab | The **‘Invitations’** tab should load |  |  |  |
|  | Click the button, **Invite Staff to Meeting** | The **‘Add Staff Member’** lightbox (pop-up window on grey background) should appear |  |  |  |
|  | Click the field, **Staff Member** | The cursor should be blinking in the field |  |  |  |
|  | Start typing the name of *User A* | A dropdown menu of matching names should appear |  |  |  |
|  | Click the name of *User A* when it appears in the dropdown menu | The selected user’s name should display in the field |  |  |  |
|  | Leave the field, **‘RSVP’** with the selection, *‘Set To Attend’* | The field should display the message, *‘Set To Attend’* |  |  |  |
|  | Click the button, **Add** | The invitee should now appear listed below and marked as *‘Accepted’* in the ‘RSVP’ column |  |  |  |
|  | Click the field, **Staff Member** | The cursor should be blinking in the field |  |  |  |
|  | Start typing the name of *User B*, the attendee to the meeting | A dropdown menu of matching names should appear |  |  |  |
|  | Click the name of *User B* when it appears in the dropdown menu | The selected user’s name should display in the field |  |  |  |
|  | Click the field, **‘RSVP’** and select the option, *‘Email Invitation’* from the dropdown menu | The field should display the message, *‘Email Invitation’* |  |  |  |
|  | Click the button, **Add** | The invitee should now appear listed below and marked as *‘Invited’* in the ‘RSVP’ column |  |  |  |
|  | Click the **“X”** in the top right corner of the lightbox to close it | The ‘Invitations’ tab should reload; its title should now read, **‘Invitations(1/2)’** and the two attendees should be listed |  |  |  |
| Create Agenda | Click the **‘Agenda & Minutes (0)’** tab | The ‘Agenda & Minutes’ tab should load |  |  |  |
|  | Click the button,**‘(+) Add Agendum/Minute’** | The **‘Add Agendum’** lightbox should pop up |  |  |  |
|  | Click the **Description** field | The cursor should blink inside it |  |  |  |
|  | Enter the text, *“Greetings & Introduction”* | The text should display in the field |  |  |  |
|  | Click the button,**‘Add Agendum’** | The screen should refresh and the agenda item should appear listed |  |  |  |
|  | Click the button,**‘(+) Add Agendum/Minute’** | The **‘Add Agendum’** lightbox should pop up |  |  |  |
|  | Enter the text, *“Roll call”* | The text should display in the field |  |  |  |
|  | Click the button,**‘Add Agendum’** | The screen should refresh and the two agenda items should appear listed |  |  |  |
|  | Click the button,**‘(+) Add Agendum/Minute’** | The **‘Add Agendum’** lightbox should pop up |  |  |  |
|  | Enter the text, *“Discuss budget”* | The text should display in the field |  |  |  |
|  | Click the button,**‘Add Agendum’** | The screen should refresh and three agenda items should appear listed |  |  |  |
|  | Click the button,**‘(+) Add Agendum/Minute’** | The **‘Add Agendum’** lightbox should pop up |  |  |  |
|  | Enter the text, *“Present big plan”* | The text should display in the field |  |  |  |
|  | Click the button,**‘Add Agendum’** | The screen should refresh and four agenda items should appear listed |  |  |  |
|  | Click the ‘up’ arrow (↑) in the **Actions** column of item 4 *(‘Present big plan’*) | The item should move up to take position 3, putting *‘Discuss budget’* in 4th position |  |  |  |
|  | Click the button,**‘(+) Add Agendum/Minute’** | The **‘Add Agendum’** lightbox should pop up |  |  |  |
|  | Enter the text, *“Set tasks”* | The text should display in the field |  |  |  |
|  | Click the button,**‘Add Agendum’** | The screen should refresh and five agenda items should appear listed |  |  |  |
|  | Click the bin/trash icon in the **Actions** column of the last item (*‘Set tasks’*) | A dialogue box should appear with the message, *‘Are you sure you wish to delete this agenda?’* |  |  |  |
|  | Click the button, **OK** | The screen should refresh and the fifth agenda item should have been removed |  |  |  |
|  | Click the button,**‘(+) Add Agendum/Minute’** | The **‘Add Agendum’** lightbox should pop up |  |  |  |
|  | Enter the text, *“Conclusion”* | The text should display in the field |  |  |  |
|  | Click the button,**‘Add Agendum’** | The screen should refresh and five agenda items should appear listed |  |  |  |
|  | Log out as *User A* | The login screen should load |  |  |  |
| §§§ End of Agenda creation |  |  |  |  |  |
| NOTE: Emails with invitations to meetings carry links to confirm/decline attendance. They are not considered in this test as these emails are not issued from the Validation account. Attendance can be confirmed from within the account as follows. |
| §§§ |  |  |  |  |  |
| Confirm Attendance | Log into iPassport as *User B* | - - - - - - |  |  |  |
|  | Hover over the **Laboratory Management** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Meetings** sub-menu item  | The **Meetings** sub-menu item should be highlighted |  |  |  |
|  | Click the **Meetings** sub-menu item | The **Search Meetings** tab should be loaded |  |  |  |
|  | Click the **Search** field | The cursor should appear blinking inside it |  |  |  |
|  | Start typing the name of the meeting created above | The results below should refresh to show meetings with matching search criteria |  |  |  |
|  | Locate the meeting just created and click its row to open it | The meeting’s **General** tab should load |  |  |  |
|  | Click the **Invitations** tab | The **Invitations(1/2)** tab should load; two invitees should be listed and one (*User A*) should have the **Status**, *‘Accepted’* |  |  |  |
|  | In the row of *User B*, under the **Invitation** column, hover over the calendar icon with a tick mark (✓) | The pointer should turn into a ‘hand’ and the message, *“Accept Invitation”* should pop up |  |  |  |
|  | Hover over the second icon - a calendar icon with a cross mark (x) | The pointer should turn into a ‘hand’ and the message, *“Decline Invitation”* should pop up |  |  |  |
|  | Hover over the third icon – an envelope icon | The pointer should turn into a ‘hand’ and the message, *“Email”* should pop up; this allows resending the invitation email when required |  |  |  |
|  | Click the calendar icon with a tick mark (✓) | The icons should disappear and the **Status** should now show as *‘Accepted’* |  |  |  |
|  | Log out as *User B* | The login screen should load |  |  |  |
| Confirm Privacy | Log into iPassport as *User C* | - - - - - - |  |  |  |
|  | Hover over the **Laboratory Management** main menu item | The sub-menu should appear |  |  |  |
|  | Hover over the **Meetings** sub-menu item  | The **Meetings** sub-menu item should be highlighted |  |  |  |
|  | Click the **Meetings** sub-menu item | The **Search Meetings** tab should be loaded |  |  |  |
|  | Click the **Search** field | The cursor should appear blinking inside it |  |  |  |
|  | Start typing the name of the meeting created above | The results below should refresh to show meetings with matching search criteria |  |  |  |
|  | Locate the meeting just created and click its row to open it | A white screen should appear with the message, *“Sorry but you do not have the required permissions to access this area. Please contact your local iPassport administrator for further assistance.”* |  |  |  |
|  | Log out as *User C* | The login screen should load |  |  |  |
| Issue missing invite | Log into iPassport as *User A*  | - - - - - - |  |  |  |
|  | Click the **History** link in the left sidebar menu | The sidebar should expand to show the history of pages recently visited |  |  |  |
|  | At the top of the History list, find and click the item titled, *‘View Meeting: <name of meeting created above>’* | The screen should refresh to display the **General** tab of the meeting created above |  |  |  |
|  | Click the **‘Invitations’** tab | The **‘Invitations’** tab should load |  |  |  |
|  | Click the button, **Invite Staff to Meeting** | The **‘Add Staff Member’** lightbox (pop-up window on grey background) should appear |  |  |  |
|  | Click the field, **Staff Member** | The cursor should be blinking in the field |  |  |  |
|  | Start typing the name of *User C* | A dropdown menu of matching names should appear |  |  |  |
|  | Click the name of *User C* when it appears in the dropdown menu | The selected user’s name should display in the field |  |  |  |
|  | Leave the field, **‘RSVP’** with the selection, *‘Set To Attend’* | The field should display the message, *‘Set To Attend’* |  |  |  |
|  | Click the button, **Add** | The invitee should now appear listed below and marked as *‘Accepted’* in the ‘RSVP’ column |  |  |  |
|  | Click the **“X”** in the top right corner of the lightbox to close it | The ‘Invitations’ tab should reload; its title should now read, **‘Invitations(3/3)’** and the three attendees should be listed |  |  |  |
|  | Log out as *User A* | The login screen should load |  |  |  |
|  | Log into iPassport as *User C* | - - - - - - |  |  |  |
|  | Hover over the **Laboratory Management** main menu item and click the **Meetings** sub-menu item | The **Search Meetings** tab should be loaded |  |  |  |
|  | Click the **Search** field | The cursor should appear blinking inside it |  |  |  |
|  | Start typing the name of the meeting created above | The results below should refresh to show meetings with matching search criteria |  |  |  |
|  | Locate the meeting just created and click its row to open it | The meeting’s **General** tab should load |  |  |  |
|  | Log out as *User C* | The login screen should load |  |  |  |
| §§§ End of Attendance and Privacy Confirmation |  |  |  |  |  |
| NOTE: The following section covers how to perform a meeting and log attendance. |
| §§§ |  |  |  |  |  |
| Conduct Meeting | Log into iPassport as *User A*  | - - - - - - |  |  |  |
|  | Click the **History** link in the left sidebar menu | The sidebar should expand to show the history of pages recently visited |  |  |  |
|  | At the top of the History list, find and click the item titled, *‘View Meeting: <name of meeting created above>’* | The screen should refresh to display the **General** tab of the meeting created above |  |  |  |
|  | Click the **‘Agenda & Minutes (5)’** tab | The ‘Agenda & Minutes’ tab should load |  |  |  |
|  | Click the down arrow (˅) in the **Details** column of item 1 (*‘Greetings & Introduction’*) | The item should expand to display **‘Description’** and **‘Minute’** fields and a **‘Save’** button |  |  |  |
|  | Click the ‘Minute’ field and enter a short text like, *“Done”* | The text entered should be displayed in the field |  |  |  |
|  | Click **Save** | The item should collapse |  |  |  |
|  | In the **‘Actioned?’** column, tick the checkbox for the first agenda item, above the word, ‘**Deferred’** | The checkbox should appear ticked and the field should be renamed to, **‘Actioned’** |  |  |  |
| Confirm Attendance | Click the **‘Invitations’** tab | The **‘Invitations’** tab should load |  |  |  |
|  | Click the button,**‘✓ Set All as Present’** | The status of all invitees should change to, *‘Present’* and the **‘Set Attendance’** column should only display the option, *‘❌ Set as Absent’* |  |  |  |
|  | Click the **‘Agenda & Minutes (5)’** tab | The ‘Agenda & Minutes’ tab should load |  |  |  |
|  | Click the down arrow (˅) in the **Details** column of item 2 (*‘Roll call’*) | The item should expand to display **‘Description’** and **‘Minute’** fields and a **‘Save’** button |  |  |  |
|  | Click the ‘Minute’ field and enter a short text like, *“All present”* | The text entered should be displayed in the field |  |  |  |
|  | Click **Save** | The item should collapse |  |  |  |
|  | In the **‘Actioned?’** column, tick the checkbox for the second agenda item, above the word, ‘**Deferred’** | The checkbox should appear ticked and the field should be renamed to, **‘Actioned’** |  |  |  |
| §§§ End of Meeting |  |  |  |  |  |
| NOTE: Once a meeting is finished, it can be marked as ‘Complete’. If it is a recurring meeting, this step will trigger the next meeting as follows. |
| §§§ |  |  |  |  |  |
| Complete meeting | Tick the checkboxes for items 3 & 5 and leave item 4 unticked | Items 3 and 5 should be marked as **‘Actioned’** while item 4 remains as **‘Deferred’** |  |  |  |
|  | Click the down arrow (˅) in the **Details** column of item 4 (*‘Discuss Budget’*) | The item should expand to display **‘Description’** and **‘Minute’** fields and a **‘Save’** button |  |  |  |
|  | Click the ‘Minute’ field and enter a short text like, *“To do next time”* | The text entered should be displayed in the field |  |  |  |
|  | Click **Save** | The item should collapse |  |  |  |
|  | Click the **Actions** field in the top right area of the record | A dropdown menu of options should appear |  |  |  |
|  | Select the option, *‘Set as Completed’* and click **Go** | The page should refresh to display the **General** tab and the label, *‘Completed’* should show next to the meeting name and |  |  |  |
| Recurring meeting | Click the **‘Search Meetings’** tab | The **‘Search Meetings’** tab should load |  |  |  |
|  | Click the **Search** field | The cursor should appear blinking inside it |  |  |  |
|  | Start typing the name of the meeting created above | The results below should refresh to show meetings with matching search criteria |  |  |  |
|  | Locate the meeting just created and another one with the same name | The meeting created above should be listed with the **Status**, *‘Completed’* and a copy of it should also be listed with a **Date** one week from the date of this test |  |  |  |
|  | Click the row of the new recurring meeting with status, *‘Not Completed’* | The meeting should open to its **General** tab |  |  |  |
|  | Click the **Invitations** tab | The **Invitations** tab should load and the same 3 attendees should be listed with the **Status**, *‘Invited’* (attendance not confirmed yet) |  |  |  |
|  | Click the **Agenda & Minutes** tab | Only one agenda item should be displayed – *‘Discuss Budget’*, which was deferred |  |  |  |
|  | Click the down arrow (˅) in the **Details** column of the agenda item | The item should expand and the **‘Minute’** field should still contain the text, *“To do next time”* |  |  |  |
| NOTE: Recurring meetings retain invitees and issue fresh emails when the next one is created; minutes are preserved but only agenda items not marked as ‘Actioned’ are copied over. |
| §§§ End of Recurring meetings |  |  |  |  |  |
| NOTE: Meetings can also be duplicated (cloned) when the same agenda is to be used again. A meeting can only be duplicated if it doesn’t have frequency settings as seen below. |
| §§§ |  |  |  |  |  |
| Unlock meeting | Click the **‘Back’** button next to the meeting name | The **Search Meetings** tab should reload with the search entered above |  |  |  |
|  | Click the row of the completed meeting | The meeting completed above should load to its **General** tab and no fields should display edit (pencil) icons |  |  |  |
|  | Click the **Actions** field in the top right area of the record | A dropdown menu of options should appear |  |  |  |
|  | Select the option, *‘Unlock meeting’* and click **Go** | A dialogue box should appear with the message, *‘Are you sure you wish to perform this action?’* |  |  |  |
|  | Click **OK** | The page should refresh and the tag, *‘Active’* should show next to the meeting name; edit (pencil) icons should show next to every field |  |  |  |
| Clone a Meeting | Click the edit (pencil) icon under the field, **‘Frequency’** | The field should expand to show Save/Cancel buttons |  |  |  |
|  | Click the field with the value *‘Weekly’* and select *‘Non-Recurring’* from the dropdown list | The option, *‘Non-Recurring’* should appear selected |  |  |  |
|  | Click **Save** | The field should collapse to only display the selected option |  |  |  |
|  | Click the **Actions** field in the upper right area of the record | Notice the absence of the option, *‘Duplicate this Meeting’* in the dropdown menu |  |  |  |
|  | Click the **History** link in the left sidebar menu | The sidebar should expand to show the history of pages recently visited |  |  |  |
|  | At the top of the History list, find and click the item titled, *‘View Meeting: <name of meeting created above>’* | The record should refresh and display the **General** tab again |  |  |  |
|  | Click the **Actions** field again | Notice the option, *‘Duplicate this Meeting’* is now availablein the dropdown menu |  |  |  |
|  | Select the option, *‘Duplicate this Meeting’* from the **Actions** dropdown menu and click **Go** | The **‘Duplicate Meeting’** lightbox should pop up |  |  |  |
|  | Click the field, **‘New Meeting Date’** | A calendar should pop up |  |  |  |
|  | Select today’s date in the calendar | The calendar should collapse and the date should be displayed in the field |  |  |  |
|  | Click the button, **‘Duplicate Meeting’** | The screen should refresh to display a new meeting with the word, *‘(Duplicated)’* added to the same name |  |  |  |
|   | Click the **Invitations** tab | The **Invitations** tab should load and no invitees should be listed |  |  |  |
|  | Click the **Agenda & Minutes** tab | The tab should load and the original 5 agenda items should appear listed |  |  |  |
|  | Click the down arrow (˅) in the **Details** column of the item, (*‘Greetings & Introduction’*) | The field, **‘Minute’** should appear empty |  |  |  |
| NOTE: Cloned meetings preserve all agenda items but not any minutes; invitees are not copied to cloned meetings |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 7th July 2021 | Document created |