**Validation Details**

This validation test covers the Metrics area in iPassport, designed to allow managers to follow trends and check if targets are being met.

**Changes between iPassport versions:**

Current version: v3.5.0

Previous version: N/A

Changes to this area of iPassport:

N/A – New (document)

**Pre-requisites:**

Two users are required for this test. User “A” will act as an administrator with at least the roles, *Administration Editor* and *Global Editor (excluding admin)*. *Note: in the iPassport Validation account, members of the ‘Validation’ user group already have the permissions required for user A.* User “B” will act as a viewer, with the role, *Global Viewer (excluding admin and personnel records)*.

This process describes how to view and manage Metrics in iPassport. No documents are required.

This procedure should be performed within a test or training account so that unwanted records are not stored within a live account. As the training account only has sporadic use, some metrics will have no data to show or the results might be meaningless.

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 user A with the permissions described above.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  | *User A*, log in | User A’s default landing screen should open |  |  |  |
| Global Menu | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab |  |  |  |
| Predefined Metrics | Click the **Predefined** **Metrics** tab | A different set of tabs should display, showing legacy metrics for *Controlled Documents, Competency, Non Compliances, Users* and *Equipment* |  |  |  |
|  | Click the **Users** tab | The page should display an area with criteria filters and a chart below |  |  |  |
|  | In the Filter area, change the Start Date to a date 2 years in the past (e.g., 1-Oct-2017) and click the return/enter key | The chart should rebuild to include the data of the time period entered. |  |  |  |
| Optional | If desirable, experiment with other metrics to confirm they are functioning in this new area | Predefined metrics are in a separate area but should still work correctly |  |  |  |
| Global Menu | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab |  |  |  |
| User editable Metrics | Click the **Metrics** tab | The Metrics page should display with a search area and a list of metrics below |  |  |  |
|  | Click the row of the metric, *Percentage of Incomplete Tasks*, below | The screen should refresh to show a chart and a table of data below it |  |  |  |
|  | Click the bar marked, **Show Metric Metadata** | The area should expand to show the criteria used to build the chart |  |  |  |
|  | Click the same bar, now marked, **Hide Metric Metadata** | The area should collapse to how it was |  |  |  |
|  | Hover over the column items in the graph | Details of the time period and value should pop up |  |  |  |
|  | Click the chart context menu icon near the top right of the chart (**≡**) | A pop-up box should appear, offering options to, Print or Download the chart in several formats |  |  |  |
|  | Click **Download PDF Document** | A download should become available in the browser, according to its settings |  |  |  |
| New Metric | Click the **New Metric** tab | Only the field, **Data Source Type** should be visible |  |  |  |
|  | Click in the field under **Data Source Type** | A dropdown menu showing data source options should appear |  |  |  |
|  | Click *Non Compliances* | The page should refresh to add relevant fields |  |  |  |
|  | Enter a **Name** for the new metric | The name should display in the designated field; this metric is going to check for NCs left open |  |  |  |
|  | In the Data Source Options area, click in the field by **Where**, under **Add Data Filter** | A dropdown menu should appear |  |  |  |
|  | Select *Closed On* from the dropdown menu | The choice, *Closed On* should display in the field and another field should appear to its right |  |  |  |
|  | Click the field to the right of the *Closed On* field | A dropdown menu should appear |  |  |  |
|  | Select *Is empty* from the dropdown menu | The choice, *Is empty* should display in the field |  |  |  |
|  | Click the **View** **Filter Results** buttonon the right | A lightbox should pop up to display a list of NCs; the column **Status** should show them all as *Open* |  |  |  |
|  | Click the “X” on the top right of the screen | The lightbox should close and the screen should return to the new metric area |  |  |  |
|  | In the **Chart Settings** area, click in the field under **Chart Type** | A dropdown menu should appear |  |  |  |
|  | Select *Column Chart* | The field should display the choice, *Column Chart* |  |  |  |
|  | Under **Display**, select the option **Count** | The radio button next to **Count** should be highlighted |  |  |  |
|  | The value under **Calculation** can be ignored for this metric | The default value, *Average* should display in the field |  |  |  |
|  | Under **Timescales**, click in the first field (*Timeline*) | A dropdown menu should appear |  |  |  |
|  | Select the option, *2 years* | The option, *2 years* should display in the first field |  |  |  |
|  | Similarly, select the option, *Month* in the second field | The option, *Month* should display in the second field |  |  |  |
|  | Select the option, *Created At* in the third field | The option, *Created At* should display in the third field |  |  |  |
|  | Untick the checkbox by **Display values for each OU separately** | It’s ticked by default for new metrics so it should require un-ticking |  |  |  |
|  | Tick the checkbox by **Include KPI threshold** | The area should expand to reveal KPI settings |  |  |  |
|  | Select *Less Than* from the dropdown menu in the first field next to, **Good when values are** | The choice *Less Than* should display in the first field |  |  |  |
|  | Enter the number, “1” in the second field | The number, “1” should show in the second field |  |  |  |
|  | Click **Save** | The page should refresh and the metric chart and data should appear; a red dotted line (KPI) marked, *Good when value is lower than 1* should appear across the chart  |  |  |  |
| Edit Metric | Click in the **Actions** field to the right of the metric title | A dropdown menu should appear |  |  |  |
|  | Select *Edit* from the dropdown menu | The choice, *Edit* should display in the field |  |  |  |
|  | Click **Go** | A lightbox should pop up |  |  |  |
|  | Edit the name of the metric to include the word, “*Percentage”* | A more meaningful name can be applied while editing a metric; this metric will now be edited to display the percentage of NCs left open |  |  |  |
|  | In the **Data Source Options** area, click the red “X” next to, *Closed On is Empty* | The condition should disappear and be replaced with the legend, *Showing all records* |  |  |  |
|  | Under **Display**, change the option to **Percentage** by clicking the radio button next to it | The radio button next to **Percentage** should be highlighted and a box should appear, marked, **Data Source Sub Filter** |  |  |  |
|  | In the **Data Source Sub Filter** section, click in the field next to **Where** and select *Closed On* from the dropdown menu | The choice, *Closed On* should display in the field and another field should appear to its right |  |  |  |
|  | Click the field to the right of the *Closed On* field and select *Less than or equal* from the dropdown menu | The choice, *Less than or equal* should display in the second field and another field should appear to its right |  |  |  |
|  | Click the field to the right of the *Less than or equal* field and select *Last Month* from the dropdown menu | The choice, *Last Month* should display in the third field |  |  |  |
|  | Change the value of the KPI setting from “1” to “50” | The number, “50” should show in the field |  |  |  |
|  | Click **Save** | The page should refresh to show bars that don’t overpass 100% and a KPI threshold of 50 across the chart |  |  |  |
| External Link for Metrics | Click the **Actions** field to the right of the metric title and select *Create External Link* from the dropdown menu | The choice, *Create External Link* should show in the field |  |  |  |
|  | Click **Go** | A lightbox should pop up with a **Copy Link** button |  |  |  |
|  | Click **Copy Link** | The legend, “*Copied to Clipboard*” should appear above the button |  |  |  |
|  | User A, log out | iPassport should close and return to the login page |  |  |  |
|  | Open a new tab in the browser | A new tab should be available to paste the URL of the metric |  |  |  |
|  | Paste the copied link in the URL address field at the top of the browser page | The metric chart should build in the new tab and the link can be stored for future use |  |  |  |
| Dashboard | *User A*, log in | User A’s default landing screen should open |  |  |  |
|  | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab |  |  |  |
|  | Click **+Create New Dashboard** | The **Create a New Dashboard** lightbox should appear |  |  |  |
|  | Enter a **Name** in the field provided | The name should display in the field |  |  |  |
|  | Leave the option, **Share this Dashboard with all users** ticked | A tick mark should show in the checkbox next to the preference |  |  |  |
|  | Click **Save** | The screen should refresh to present a blank dashboard in editable state |  |  |  |
| Add metrics to dashboard | Click the plus sign (**+**) marked, **Add a new widget**, in any of the empty metric slots on the screen | A lightbox should pop up with the option to select **Metrics** or **Widgets** |  |  |  |
|  | Ensure the **Metrics** button is selected | The **Metrics** button should appear white while the **Widgets** button should appear greyed out |  |  |  |
|  | Click in the field under **Select metric to add to the Dashboard** | A dropdown menu of existing metrics should appear |  |  |  |
|  | Select the metric created above | The dropdown menu should collapse leaving the metric name in the field |  |  |  |
|  | Click the **Add Metric** button | The metric chart should build in the selected slot |  |  |  |
|  | Repeat the 5 steps above to add more metrics or widgets to the dashboard | Several slots should be populated with metrics or widgets |  |  |  |
|  | Click the **Save Dashboard** button | The screen should refresh to display the saved dashboard |  |  |  |
|  | User A, log out | iPassport should close and return to the login page |  |  |  |
| Visibility | *User B*, log in | User B’s default landing screen should open |  |  |  |
|  | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab, showing the **Default Dashboard** |  |  |  |
|  | Click in the field, **Switch to a different dashboard** and select the dashboard created above | The new dashboard should display on the screen |  |  |  |
|  | User B, log out | iPassport should close and return to the login page |  |  |  |
| Visibility | *User A*, log in | User A’s default landing screen should open |  |  |  |
|  | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab, showing the **Default Dashboard** |  |  |  |
|  | Click in the field, **Switch to a different dashboard** and select the dashboard created above | The new dashboard should display on the screen |  |  |  |
|  | Click the **Edit Dashboard** button | The screen should refresh to show the dashboard in editable state |  |  |  |
|  | Untick the checkbox under the option, **Share this Dashboard with all users** | No tick mark should show in the checkbox below the preference |  |  |  |
|  | Click **Save Dashboard** | The screen should refresh to display the saved dashboard |  |  |  |
|  | User A, log out | iPassport should close and return to the login page |  |  |  |
| Restricted Visibility | *User B*, log in | User B’s default landing screen should open |  |  |  |
|  | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab, showing the **Default Dashboard** |  |  |  |
|  | Click in the field, **Switch to a different dashboard** if it’s visible | If only two dashboards exist and one is ‘private’, the button won’t even show; if there are more dashboards, the new one created above should not be visible to this user |  |  |  |
| §§§ |  |  |  |  |  |
| Optional – Delete Dashboard | User B, log out | iPassport should close and return to the login page |  |  |  |
|  | *User A*, log in | User A’s default landing screen should open |  |  |  |
|  | Click **Metrics** in the global menu | The metrics area should open to the **Dashboard** tab, showing the **Default Dashboard** |  |  |  |
|  | Click in the field, **Switch to a different dashboard** and select the dashboard created above | The new dashboard should display on the screen |  |  |  |
|  | Click the **Edit Dashboard** button | The screen should refresh to show the dashboard in editable state |  |  |  |
|  | Click the **Delete this Dashboard** button | A message should pop up saying, “*Are you sure you want to remove this dashboard?”* |  |  |  |
|  | Click **OK** | The screen should refresh to show the default dashboard and the one created above should disappear |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 16th Oct 2019 | Document created |