**Validation Details**

This validation test covers the My Tasks side bar function within iPassport.

**Changes between iPassport versions:**

Created for v.3.3.0

Changes to this are of iPassport: Change Summary –

No changes have been made this is area as part of this release.

**Pre-requisites:**

Prior to starting this test you need to have a login to iPassport, access to controlled documents at least an editor level.

Full administration access is not required for this test.

You need to have an authorised controlled document, which is not due for review at this moment.

Ensure you are not already skilled on this document, if you re delete the skill.

Please Note: This validation test assumes there are no existing tasks on your user record; the validation process still works if there are but you should make an allowance for this with respect to task numbers, screens and messages.

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 are you to be logged in for longer than the 15 minutes’ default period.

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

There maybe 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 **Users.**

**From within iPassport (login):**

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| Navigation | Click the **My Tasks** side bar | The **My Tasks** sidebar should expand |  |  |  |
| My Tasks | Check the task list | This should show “You have no outstanding tasks” |  |  |  |
|  | Click the cross (x) in the top right of the **My Tasks** area | The **My Tasks** area should be hidden once again |  |  |  |
|  | Navigate to your controlled document | **- - - - - -** |  |  |  |
|  | Enter the controlled document | This should open on the **General** tab |  |  |  |
| Creating a task | Click the **Tasks** tab | The **Tasks** tab should load |  |  |  |
|  | Click the **Add Task** option | The **Add Task to ……** area should load |  |  |  |
|  | Click the **Assigned To** field | The cursor should be visible in the field |  |  |  |
|  | Start to type your name | The assigned to field should filter down to your name (Note: this may depend on how many characters you type) |  |  |  |
|  | Click your name | You should be added to the **Assigned To** field |  |  |  |
|  | Add a **Due Date** of tomorrow | The date should be visible in the **Due Date** field |  |  |  |
|  | Click the **Description** field | The cursor should appear in the **Description** field |  |  |  |
|  | Add the description of My Task Test | The description should be visible |  |  |  |
|  | Click **Create Task** | The **Add Task to ……** area should close and you should be returned to the **Tasks** tab |  |  |  |
|  | Click the **General** tab for the controlled document | The **General** tab should load |  |  |  |
|  | Check there is a task notification on the **General** tab now | There should be a task notification on the **General** tab |  |  |  |
|  | Logout of iPassport | You should be logged out |  |  |  |
|  | Log back into iPassport | **- - - - - -** |  |  |  |
|  | Click the **My Tasks** side bar | The **My Tasks** side bar should expand |  |  |  |
|  | Check the side bar | The newly created task should be listed |  |  |  |
|  | Check the **Due** period | This should be tomorrow (if doing on the same day) |  |  |  |
|  | Check the text | This should show the text you entered earlier |  |  |  |
|  | Click the task item | The item should be selected and you should be taken to the **General** tab for the controlled document you used |  |  |  |
|  | Click the **Done** button for the task in the **General** tab | This should open the **Completed Notes** box |  |  |  |
|  | Add a note and click **Complete Test** | The **Completed Notes** box should disappear and you should be returned to the **General** tab |  |  |  |
|  | Check the **General** tab | The task should no longer be present |  |  |  |
|  | Click the **Tasks** tab in the controlled document | The **Tasks** tab should be displayed |  |  |  |
|  | Check you task | This should be marked as **Completed** |  |  |  |
|  | Click the expand option for the task | The task should expand |  |  |  |
|  | Check the **Completed Notes** field | This should show the note you previously entered |  |  |  |
|  | Click the **Refresh** button in the side bar | The area should refresh and show you the message “You have no outstanding tasks” |  |  |  |
|  | Click the **x** close option for the side bar | The side bar should be hidden again. |  |  |  |
|  | Navigate back to your controlled document | **- - - - - -** |  |  |  |
|  | Click the **Skilled** tab in the controlled document | The **Skilled** tab should open |  |  |  |
|  | Click the **Add Untrained Staff** option | The **Add Untrained Staff** screen should be displayed |  |  |  |
|  | Click the **Filter** option for the **Users to send this task to** field | The cursor should be visible in the **Filter** area |  |  |  |
|  | Start to type your name | The results should filter down to at least include you |  |  |  |
|  | Select you from the list | You should be selected |  |  |  |
|  | Click the **Due Date** field | The cursor should be visible in the **Due Date** field and a calendar should appear |  |  |  |
|  | Select tomorrow as the due date | The date should be displayed in the **Due Date** field |  |  |  |
|  | Click the **Create Task** button | The **Add Untrained Staff** screen should close and you should be returned to the **Skilled** tab |  |  |  |
|  | Check the **Due On** column | This should show tomorrows date (assuming you are performing this section on the same date as it was created) |  |  |  |
|  | Click **Logout** | You should be logged out of iPassport |  |  |  |
|  | Log back into iPassport | **- - - - - -** |  |  |  |
|  | Click the **My Tasks** side bar | The **My Tasks** side bar should expand |  |  |  |
|  | Check the task list | You should see a **Read** task visible |  |  |  |
|  | Click the task item | You should be taken to the **General** tab of the controlled document and a **Please Read this Document** task should be visible |  |  |  |
|  | Click **Done** | The **Completed Notes** field should be displayed |  |  |  |
|  | Click **Complete task** | The **Completed Notes** field should disappear and you should be returned to the **General** tab |  |  |  |
|  | Click the **Skilled** tab | The **Skilled** tab should open |  |  |  |
|  | Check the **Status** | This should show **Confirmed** |  |  |  |
|  | Click the refresh option in the side bar | The task should be removed and the “You have no outstanding tasks” message should be displayed |  |  |  |
|  | Click **Logout** | You should be logged out of iPassport. |  |  |  |

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| --- | --- | --- |
| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 25th October 2017 | Document was created |
| v1.0 | 9th March 2018 | Reviewed, no changes |