**Validation Details**

This validation test covers Organisational Charts in ***iPassport***, which produce a graphical representation of internal work relationships from the perspective of any given staff member.

**Changes between iPassport versions:**

Current version: v3.6.0

Previous version: N/A

Changes to this area of iPassport:

N/A – New (document)

**Pre-requisites:**

One user with at least the role, *Global Editor (excluding admin)* or *Personnel Management Editor* is required for this test. This user should have access to the staff profiles of three or more users so a reasonable organisational chart can be built.

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

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

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 with the permissions described above.

| **Area** | **Action** | **Expected Outcome** | **Observed Outcome** | **Pass/ Fail** | **Comments** |
| --- | --- | --- | --- | --- | --- |
|  | Log in | The user’s default landing screen should open |  |  |  |
| Menu | Hover over the **Personnel Management** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Profiles** sub-menu  | The **Staff Profiles** item should be highlighted  |  |  |  |
|  | Click the **Staff Profiles** item | The **Staff Profiles** area should open to the **Search** **Staff** tab |  |  |  |
|  | Click in the **Search** field and start entering the name of one of the staff to add to the organisational chart | The list of results below should start filtering names to match the text entered |  |  |  |
| Staff Profiles | Click the row of the staff member when it appears in the results area | The staff profile of the selected user should open to its **General** tab |  |  |  |
|  | Click the pencil icon under, **‘Reports To’** | A field should appear with ‘Save’ and ‘Cancel’ buttons under it |  |  |  |
|  | Click inside the field and start entering the name of another staff member, intended to be the line manager of the staff member whose profile is being viewed | Matching names will start to appear in a dropdown menu |  |  |  |
|  | Click the name of the intended line manager to select it | The name should now appear inside the field and the dropdown list should disappear |  |  |  |
|  | Click the **‘Save’** button | The field should collapse to just show the line manager’s name; at the same time, an organisational chart should appear, with both staff members displayed in it |  |  |  |
| Add third person to chart | Click the **Search Staff** tab to start another search | The screen should refresh to show the **Search Staff** tab |  |  |  |
|  | Click in the **Search** field and start entering the name of a user intended to report to the staff member whose staff profile was just visited | The list of results below should start filtering names to match the text entered |  |  |  |
|  | Click the row of the staff member when it appears in the results area | The staff profile of the selected user should open to its **General** tab |  |  |  |
|  | Click the pencil icon under, **‘Reports To’** | A field should appear with ‘Save’ and ‘Cancel’ buttons under it |  |  |  |
|  | Click inside the field and start entering the name of the staff member whose staff profile was just visited | Matching names will start to appear in a dropdown menu |  |  |  |
|  | Click the name of the intended line manager to select it | The name should now appear inside the field and the dropdown list should disappear |  |  |  |
|  | Click the **‘Save’** button | The field should collapse to just show the line manager’s name; at the same time, an organisational chart should appear, with the three staff members displayed in it |  |  |  |
|  | Click the **Search Staff** tab to start another search | The screen should refresh to show the **Search Staff** tab |  |  |  |
|  | Click in the **Search** field and start entering the name of the user currently logged in | The list of results below should start filtering names to match the text entered |  |  |  |
|  | Click the row of the staff member when it appears in the results area | The staff profile of the selected user should open to its **General** tab |  |  |  |
|  | Click the pencil icon under, **‘Reports To’** | A field should appear with ‘Save’ and ‘Cancel’ buttons under it |  |  |  |
|  | Click inside the field and start entering the name of the line manager of the first staff member viewed above | Matching names will start to appear in a dropdown menu |  |  |  |
|  | Click the name of the intended line manager to select it | The name should now appear inside the field and the dropdown list should disappear |  |  |  |
|  | Click the **‘Save’** button | The field should collapse to just show the line manager’s name; at the same time, an organisational chart should appear |  |  |  |
|  | Click the name of any of the elements in the organisational chart | The system should jump to the selected user’s staff profile |  |  |  |
|  | Click the button **“View Full Tree for…”** | A lightbox should open, displaying an extended tree of all staff entered and in relation to the user being viewed. |  |  |  |

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| **Comments/ Changes** |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 20th Jan 2021 | Document created |