**Validation Details**

This validation test covers Staff Qualifications in iPassport, designed to provide an area where staff can store and manage their professional certificates and licences.

**Changes between iPassport versions:**

Current version: v3.5.1

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 role, *Global Editor (excluding admin)* or *Personnel Management Editor* in two OUs (we’ll call OU1 and OU2). *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 Default OU, *OU2* and with the role, *Global Viewer (excluding admin and personnel records)* in *OU2*.

This process describes how to create qualifications in iPassport. Once created, staff members who hold the qualification can have it added to their profile, together with any pertinent evidence like a licence. A sample certificate or licence is required to simulate the process in this exercise. Please refer to the user guide, *Staff Qualifications* for a description, explanations and illustrations of this area.

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 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 |  |  |  |
| Menu | Hover over the **Competency** main menu | The sub-menu should be displayed |  |  |  |
|  | Hover over the **Staff Qualifications** sub-menu | The **Staff Qualifications** item should be highlighted |  |  |  |
|  | Click the **Staff Qualifications** item | The **Staff Qualifications** area should open to the **Staff Qualifications** tab |  |  |  |
| Create Qualification | Click the **New Staff Qualification** tab | The **New Staff Qualification** screen should open |  |  |  |
|  | Click in the **Name** field and enter the title of the qualification | The qualification name should display in the text box |  |  |  |
|  | Check that the **Index** field reads “Auto Generate” and if not, click the cog icon next to it | The **Index** field should display “Auto Generate” |  |  |  |
|  | Ignore the **Category** field for now. | The **Category** field should be blank |  |  |  |
|  | Enter a value of 12 (months) in the **‘Valid for’** field | The **‘Valid for’** field should display the number, 12 |  |  |  |
|  | Tick the checkbox under, **Require evidence of qualification** | The checkbox should appear ticked |  |  |  |
|  | Enter a value of 1 (month) in the **‘Reissue task (months) before expiry date’** field | The **‘Reissue task (months) before expiry date’** field should display the number, 1 |  |  |  |
|  | Click in the field under, ‘**Require verification from**’ and start typing user A’s name | The results in the dropdown list should match the entered text until user A’s name is visible |  |  |  |
|  | Click user A’s name when it becomes visible | User A’s name should be displayed in the field, with an “x” to its right |  |  |  |
|  | Ignore the **Description** field for this exercise | The **Description** field should appear empty |  |  |  |
|  | Click the **Create** button | The page should refresh to show the newly created staff qualification’s **General** tab |  |  |  |
| §§§ |  |  |  |  |  |
|  | Create another staff qualification by repeating the steps above | A new qualification should display, opened to its **General** tab when finished |  |  |  |
| Restricting qualifications to an OU | Click the **Organisational Units** tab of the 2nd qualification created | The **Organisational Units** tab should open |  |  |  |
|  | Click the **edit** (pencil) icon under **Organisational Units** | A blank field should appear under **Organisational Units** |  |  |  |
|  | Click in the field under **Organisational Units** | A dropdown menu of OUs available to the user should appear |  |  |  |
|  | Scroll down and select OU1 (one that is not user B’s default OU) | The selected OU’s name should display under **Organisational Units**, with an “x” to its right |  |  |  |
|  | Click **Save** | The area should collapse to only show the name of the selected OU under **Organisational Units** |  |  |  |
| §§§ |  |  |  |  |  |
| Create Qualification Categories | Click the **General** tab of the open staff qualification | The page should refresh to show the content of the **General** tab |  |  |  |
|  | Click the edit (pencil) icon under **Category** | A blank field should appear under **Category**, with a spanner icon and Save/Cancel buttons |  |  |  |
|  | Click the **manage** (spanner) icon | The **Qualification Categories** lightbox should pop up |  |  |  |
|  | Click **[+]Add Qualification Categories** | The area should expand to provide a field to add new categories |  |  |  |
|  | Enter a **Name** in the field supplied | The category name should display in the **Name** field |  |  |  |
|  | Click the **Create Qualification Categories** button | The area should collapse and the new category should appear listed below; it should have an **edit** (pencil) icon and a **delete** (trash/bin) icon under the **Actions** column |  |  |  |
|  | Click the “X” on the top right of the lightbox to close it | The lightbox should disappear and you should be returned to the qualification’s **General** tab; the new category should display in the field under **Category** with Save/Cancel buttons next to it |  |  |  |
|  | Click the **Save** button next to the **Category** field | The Save/Cancel buttons should disappear, leaving the new category name and an **edit** (pencil) icon |  |  |  |
|  | Click the **edit** (pencil) icon again | The field under **Category**, should expand to show a spanner icon and Save/Cancel buttons |  |  |  |
|  | Click the **manage** (spanner) icon again | The **Qualification Categories** lightbox should pop up |  |  |  |
|  | Check the **Actions** column for the category added above | The **delete** (trash/bin) icon should not be present because the category is in use |  |  |  |
|  | Click the “X” on the top right of the lightbox to close it | The lightbox should disappear and you should be returned to the qualification’s **General** tab; the new category should display in the field under **Category** with Save/Cancel buttons next to it |  |  |  |
|  | Click the **Cancel** button next to the **Category** field | The Save/Cancel buttons should disappear, leaving the new category name and an **edit** (pencil) icon |  |  |  |
| §§§ |  |  |  |  |  |
| Assign a Staff Qualification to a user | Click the **Staff** tab of the open staff qualification (the one with an added OU scope) | The page should refresh to display the **Staff** tab |  |  |  |
|  | Click the **[+]Create Qualification Staff** button | The **Select Staff Members** lightbox should pop up |  |  |  |
|  | Click in the field under **Select Staff Members** | A dropdown list of eligible users should appear under the field |  |  |  |
|  | Start typing the name of user B until all names disappear from the dropdown list | As user B doesn’t have the same default OU as the one in the OU scope, their name should not appear in this field |  |  |  |
|  | Click the “X” on the top right of the lightbox to close it | The lightbox should disappear and you should be returned to the qualification’s **Staff** tab |  |  |  |
|  | Click the **Staff Qualifications** tab | The page should refresh to show existing staff qualifications |  |  |  |
|  | Click the row of the first staff qualification created above; the one with no OU scope | The page should refresh to display the **General** tab of the staff qualification |  |  |  |
|  | Click the **Staff** tab | The page should refresh to display the **Staff** tab |  |  |  |
|  | Click the **[+]Create Qualification Staff** button | The **Select Staff Members** lightbox should pop up |  |  |  |
|  | Click in the field under **Select Staff Members** | A dropdown list of eligible users should appear under the field |  |  |  |
|  | Start typing the name of user B until it appears in the dropdown list | User B’s name should appear as this staff qualification has no OU scope |  |  |  |
|  | Click user B’s name in the dropdown list | User B’s name should appear in the field with an “x” next to it |  |  |  |
|  | Click in a blank area outside of the field and dropdown list | The dropdown list should disappear |  |  |  |
|  | Click in the field under **Due Date** | A pop-up calendar should display under the field |  |  |  |
|  | Select an appropriate date in the near future from the pop-up calendar | The calendar should disappear and the selected date should display in the **Due Date** field |  |  |  |
|  | Click the **Create** button on the bottom right of the lightbox | The page should refresh to show the **Staff** tab and user B listed with status, *Pending* |  |  |  |
|  | User A, log out | iPassport should close and return to the login page |  |  |  |
| Confirming a qualification | *User B*, log in | *User B*’s default landing screen should open |  |  |  |
|  | Click **My Tasks** on the left sidebar | A task titled, *“Confirm Your Qualification”* should appear listed |  |  |  |
|  | Click the qualification confirmation task in the sidebar | The **Qualification Confirmation** lightbox should pop up; the **Completed On** field should display today’s date |  |  |  |
|  | Click in the field under **Expires On** | A pop-up calendar should appear under the field |  |  |  |
|  | Select an appropriate date for the qualification expiry | The pop up calendar should disappear, leaving the selected date in the field |  |  |  |
|  | Click inside the dotted rectangle marked, **Drop or browse files here** | A browser selection window should appear |  |  |  |
|  | Find and select the document to be used as evidence of the qualification | The selected document should appear highlighted |  |  |  |
|  | Click **Open** (different browsers might use other words like, “Choose”) | The file browser should disappear and the selected file should start loading into the dotted area |  |  |  |
|  | Click **Confirm** by the bottom right corner of the lightbox |  |  |  |  |
|  | User *B*, log out | iPassport should close and return to the login page |  |  |  |
| Verifying a Staff Qualification | *User A*, log in | *User A*’s default landing screen should open |  |  |  |
|  | Click **My Tasks** on the left sidebar | The area should expand to list any due tasks |  |  |  |
|  | Locate and click the task titled, *Verify Staff Qualification* | A lightbox should pop up with the details of user B’s confirmation; the attachment should be visible and downoadable |  |  |  |
|  | Click **Verify** | The lightbox should close and the task in the sidebar should be highlighted in dark green to show it has been completed |  |  |  |
| Viewing staff qualifications in staff profiles | Hover over the **Personnel Management** mainmenu | 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 field under the **Default OU** search filter | A dropdown list of available OUs should appear |  |  |  |
|  | Click on user B’s default OU | User B’s default OU should display in the field |  |  |  |
|  | If not immediately visible below, start typing user B’s name in the **Search** field above; when visible below, click on user B’s row | User B’s staff profile should open to its **General** tab |  |  |  |
|  | Click the **Qualifications** tab | The page should refresh to show the staff member’s qualifications and the new qualification should be listed; the **Status** should be, *Qualified* |  |  |  |

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| **Comments/ Changes** | | |
| **Document Version** | **Date** | **Summary of changes** |
| v1.0 | 8th Jan 2020 | Document created |