

IOWA

State Hygienic Laboratory

iPassport Basics

Training Supplemental Guide

By

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The purpose of this guide is to provide SHL staff with basic steps to follow to access and use iPassport, the SHL official document management system. It is a supplement to the video tutorials.

[VIDEO TUTORIAL LINK](#)

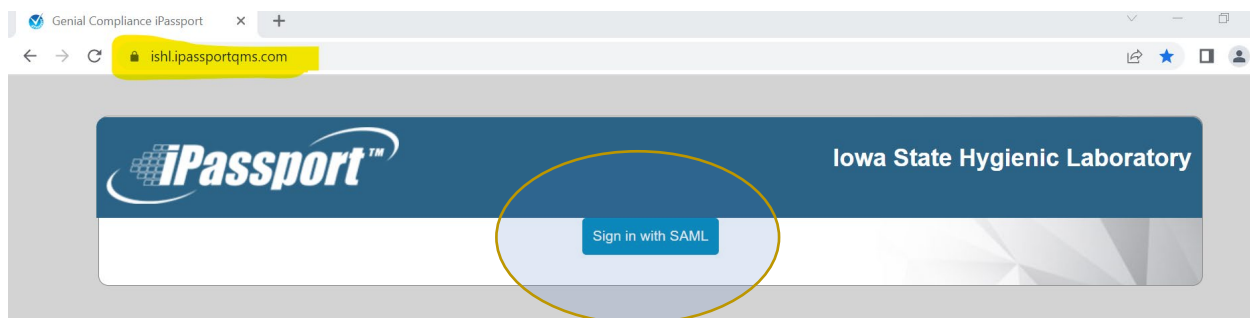
Logging Into iPassport

1. Type the following web address using the Internet browser of your choice (Edge, Explorer, Firefox, Chrome or Safari): <https://ishl.ipassportqms.com/>

*****For easy future access, bookmark iPassport to your browser toolbar.*****




2. Click "Sign-in with SAML"



3. When prompted, enter your **HawkID and Password to log-in**

HawkID Login for Required attributes



HawkID
eanderson

Password
.....

Log In [Forgot your HawkID or password?](#)

You will be logged in to this service securely. Information which will allow you to access the site you requested will be transmitted to the site. This information will be encrypted before it is sent. Please see the ITS Help Desk [Shibboleth support pages](#) for additional information.

Note: Information about and help with your HawkID can be found here: <https://its.uiowa.edu/hawkid-staff>

*****If you have any initial log-in issues, please alert your supervisor.*****

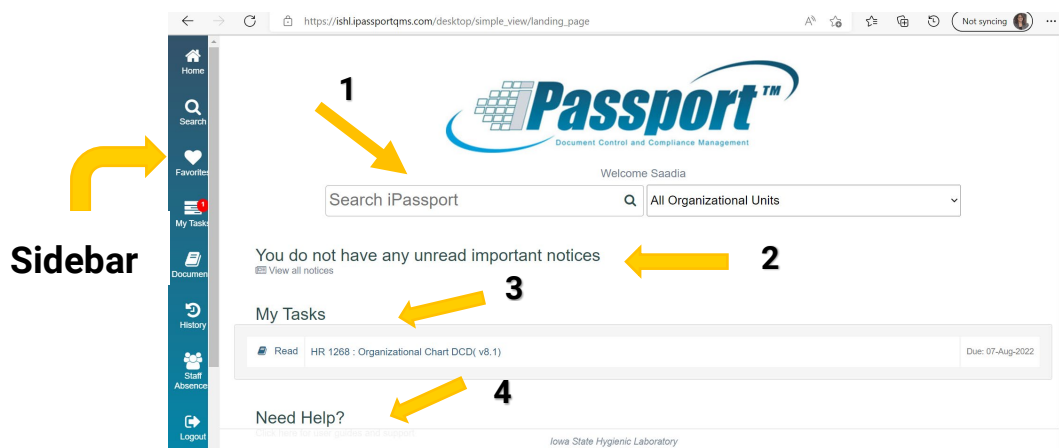
iPassport Main Operation Modes: Simple & Detailed Views

Depending on how your account is set up by SHL iPassport Administrator, you may have access to **Simple View**, **Detailed View** or **both**. Here is the difference.

Simple View

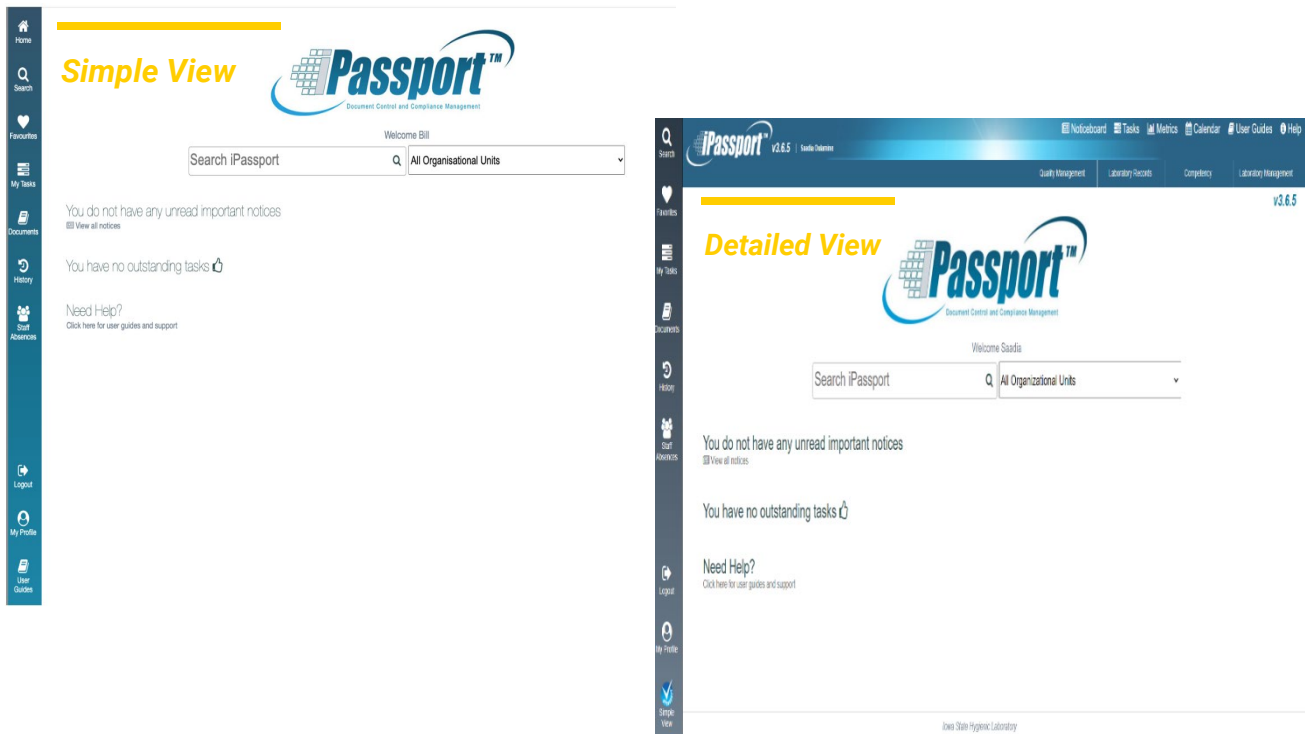
This mode of operation offers a streamlined interface. It is intended for users who only need iPassport to complete a task or search for content. This view has only the following:

- Sidebar menu
- Home page, which serves as the welcome page, and it includes: A **Search field (1)**, **Important Notices Area (2)**, **Tasks Area (3)**, and **Help Area (4)**



Detailed View

The detailed view has more menu items unlike the Simple view, which has only the Sidebar as shown in the section above. **(Refer to the screenshots below for a comparison)**

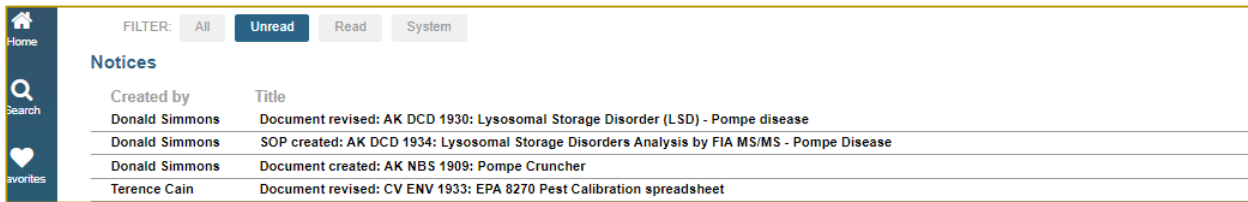


The detailed view includes the following menu groups.

- *Global menu items*
- *Sidebar menu items*
- *Main menu items*
- *Sub-menu items*
- *Tab items*
- *Record tab items*

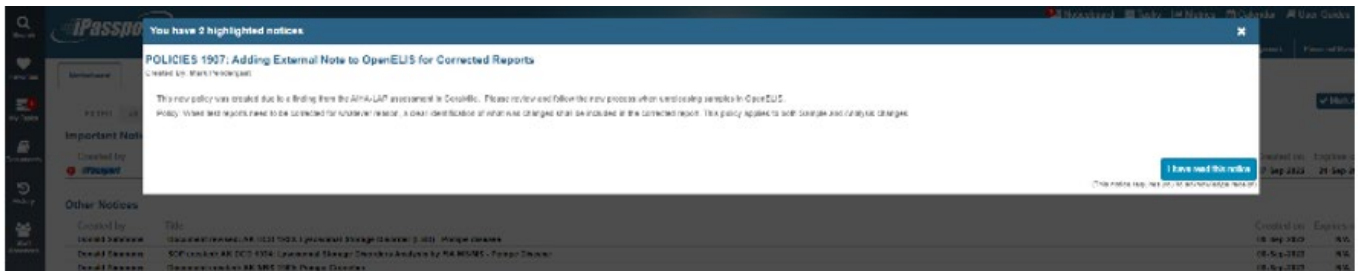
Notices

Notices in iPassport are used to share important information among State Hygienic Laboratory staff. Notices include information about new documents, revised policies and SOPs as the screenshot below demonstrates



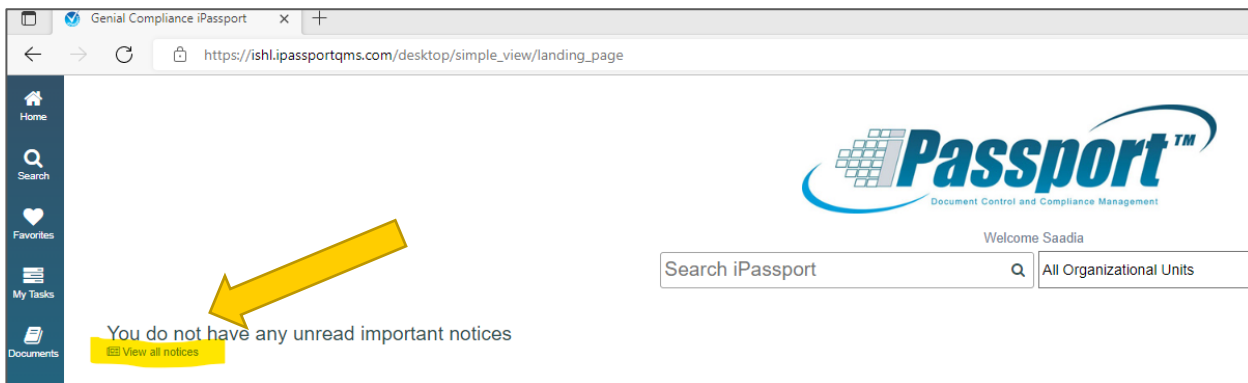
Created by	Title
Donald Simmons	Document revised: AK DCD 1930: Lysosomal Storage Disorder (LSD) - Pompe disease
Donald Simmons	SOP created: AK DCD 1934: Lysosomal Storage Disorders Analysis by FIA MS/MS - Pompe Disease
Donald Simmons	Document created: AK NBS 1909: Pompe Cruncher
Terence Cain	Document revised: CV ENV 1933: EPA 8270 Pest Calibration spreadsheet

Some notices are created in a way that they pop-up as soon as you log-in. Below is an example.



Others can be found in the **“Noticeboard”** area.

To access the **Noticeboard** in **Simple View**, click **“View all notices”** on the **Home** page.



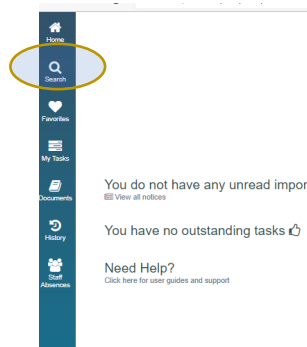
Some notices require that you confirm that you have read them and will have the button **“I have read this notice”** at the bottom. *If you discard them by clicking the **“X”** in the top right, they will continue popping-up again each time you log-in until you confirm that you have read the notice.*



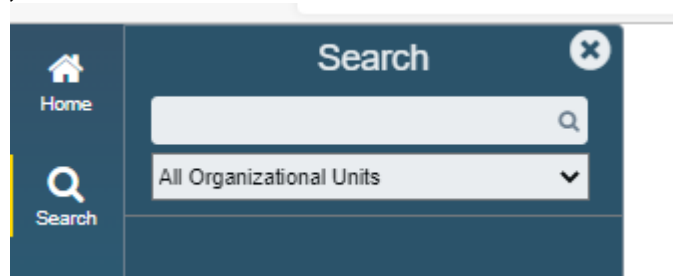
Search Feature

To search for anything in iPassport,

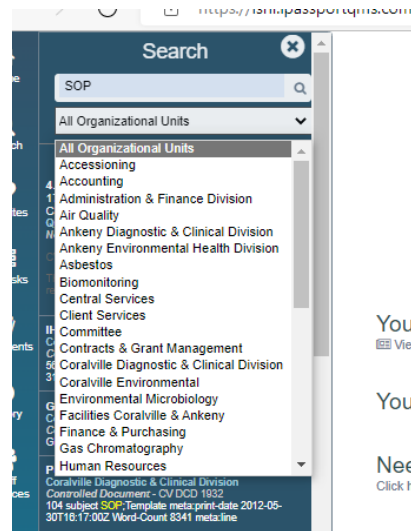
1. Click the **Search** icon on the **Sidebar**



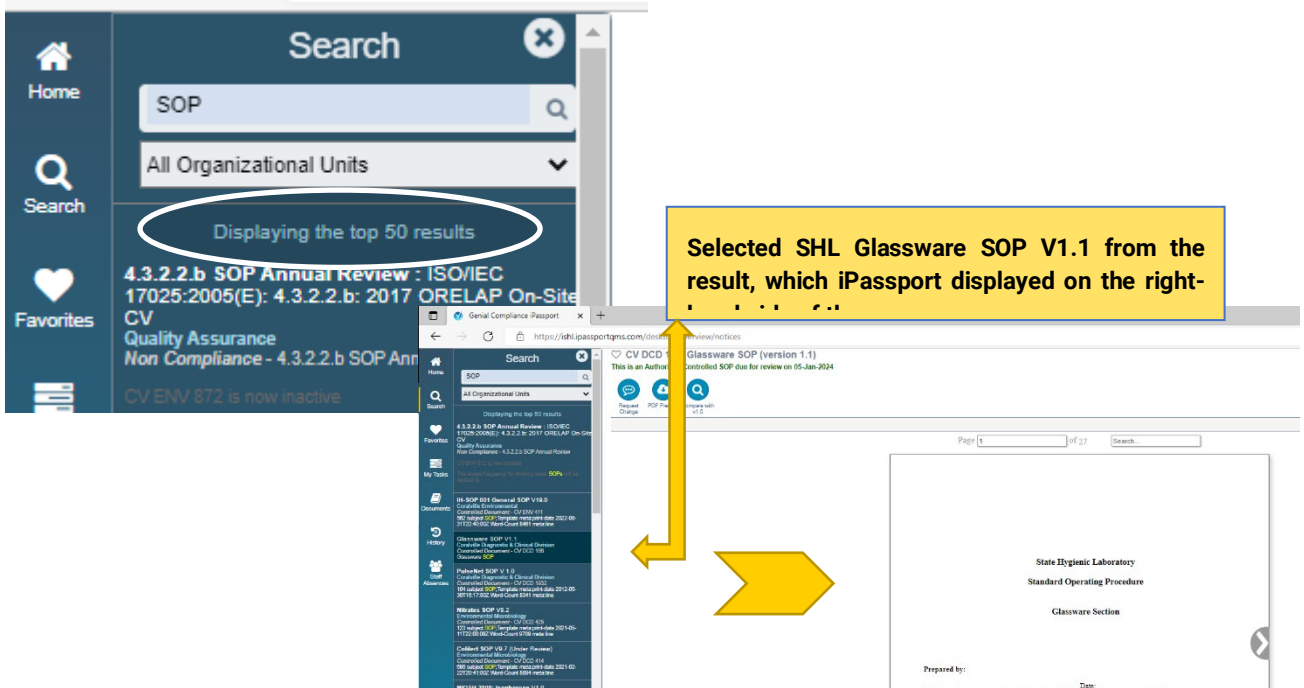
2. In the search field, type a search item and click **“enter/return”** on your keyboard, or click the magnifying glass (🔍)



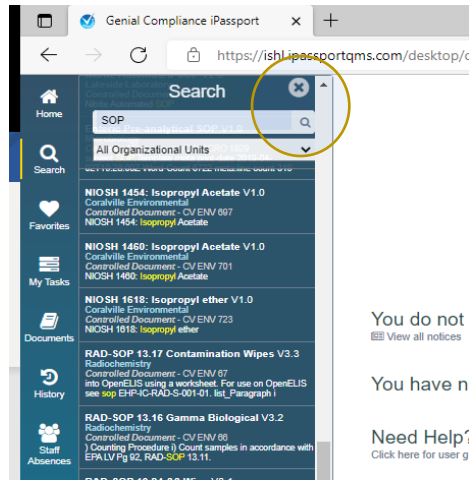
3. To limit your search to a particular organizational unit by clicking **“All Organizational Units”** and selecting the unit from the dropdown menu



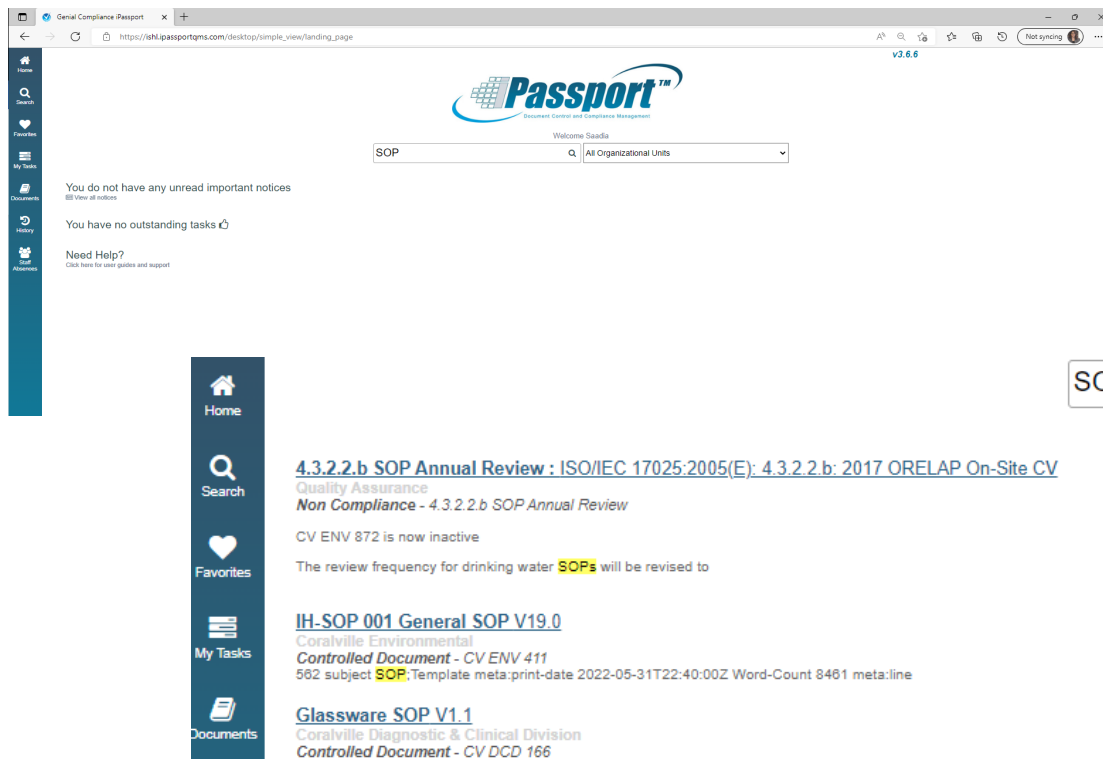
4. Click the appropriate item from the search results. iPassport will jump to the selected item, but it will keep the sidebar expanded should you need to jump to other items from the search result.



5. Click the "X" on the top right of the expanded Sidebar to collapse it. *The results will not be cleared. You can view them by clicking the Search icon again. However, they will be cleared as soon as you logout.*



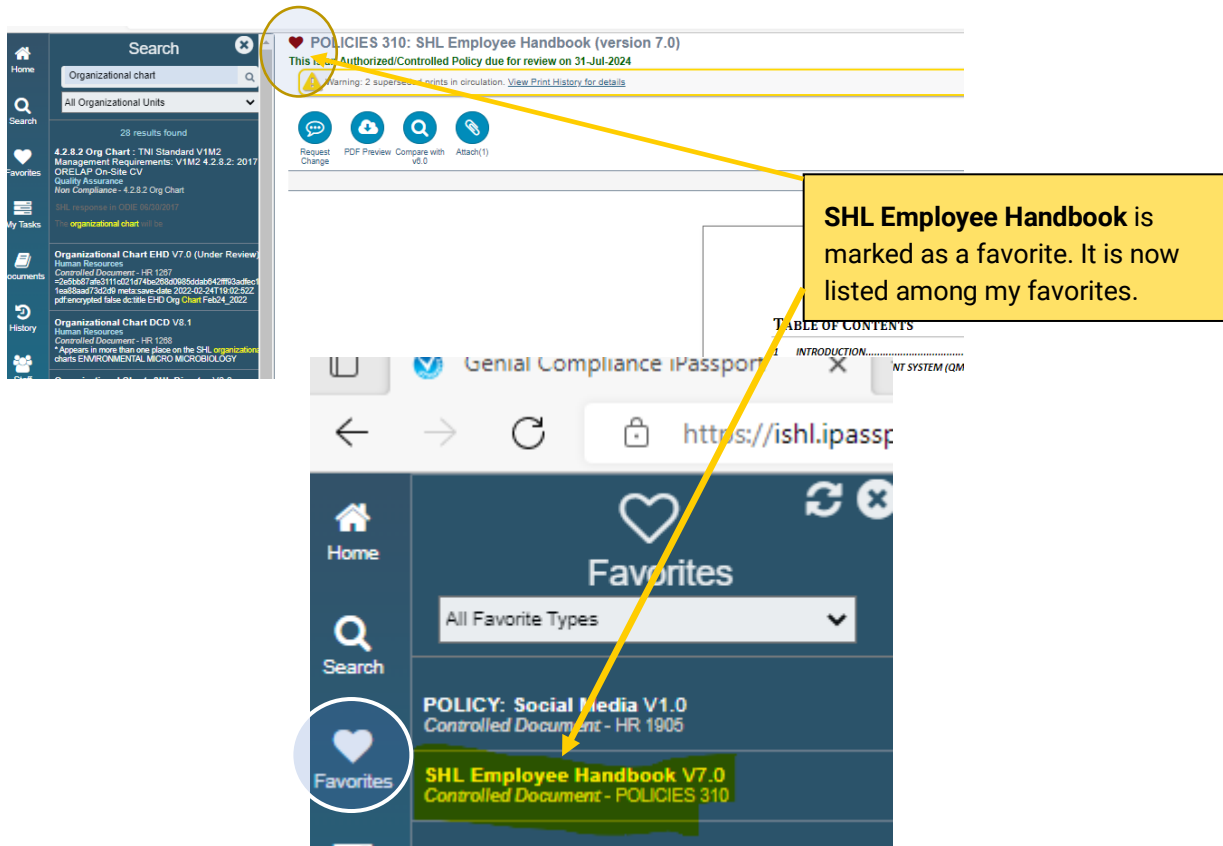
Note: A different path to search content is to use the **Global Search** feature available on the Home page when in the **Simple View**



Favorites

iPassport allows users to mark documents as a favorite and access them quickly by clicking the Favorites icon on the Sidebar.

1. First mark a document as a favorite by clicking the “heart” icon next to its title as show below



Tasks

To ensure staff members are aware and are reading SHL policies, SOPs, etc. that relate to their job, iPassport generates tasks for specific staff members to confirm that they have read and understood any document. The staff member to whom the skill task is assigned receives an e-mail notification to read and complete it.

To access and confirm that you have read the assigned skills tasks, you can either:

1. Click the link to the document, which is included in the email notification you received. OR
2. Click the **My Tasks** button on the Sidebar after you log into iPassport.
3. Click the assigned task to view and read.
4. Once read, click the **Confirm** button to acknowledge having read and understood the information.

Clicking the task opens the linked record

My Tasks - Red Circle Shows number of due tasks

Read the document here

Read the document here

... and confirm having read it here

Note: Make sure that you read the entire document. Check any other notes, attachments and links sections for additional related information. If it is a document you want to keep on your radar and access easily, click the heart symbol to add it to your favorites list. The screenshot below is of a task that has (2) attachments and (4) links.

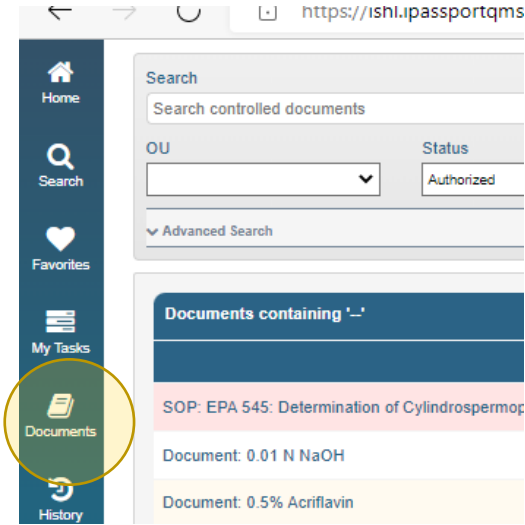
General Reviews Bench Risks PPE History Sharing(0) Notes(0) Tasks(11) Attach(2) Skilled(7) Links(4) Log

Request Change PDF Preview Compare with v2.0

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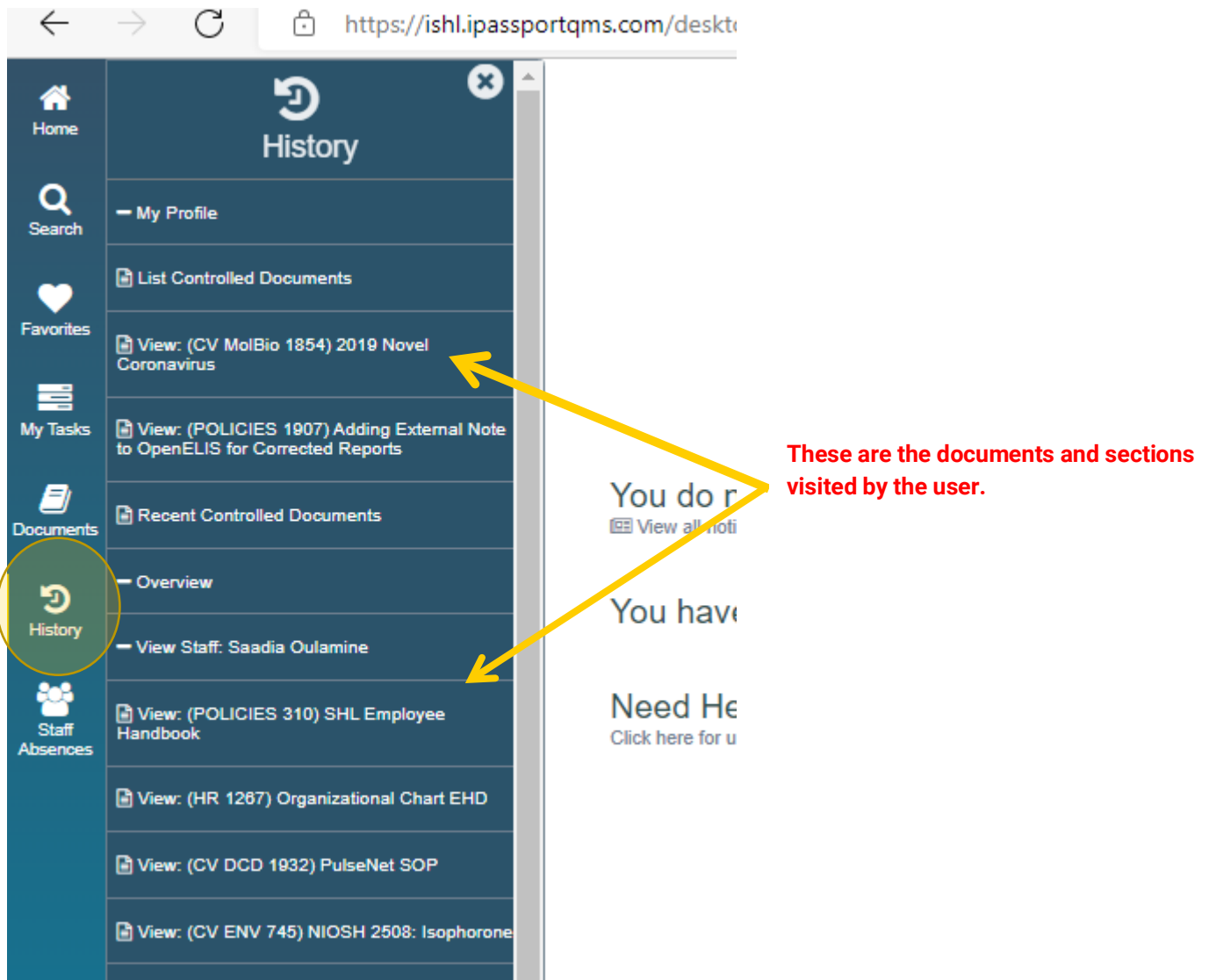
Documents

The “**Documents**” icon on the sidebar allows the user to search and access controlled documents. It allows the user to search less fields and receive more focused results, unlike the general “Search” feature previously discussed.



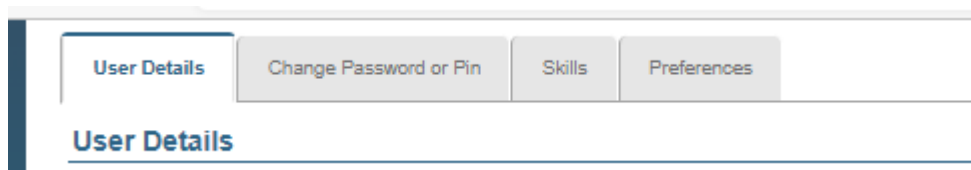
History

The “**History**” feature allows the users to access all previously visited sections of iPassport. It stores up to 20 items. ***This is especially useful since iPassport does not support the “back” button of your browser.***



My Profile

The **"My Profile"** tab on the sidebar allows iPassport users to access their personal records and history. That's where users can adjust their personal preferences. When you click "My Profile", **four sub menus** are displayed (**User Details, Change Password or Pin, Skills, and Preferences**).



The **“Skills”** tab will display all skilled tasks as **completed, confirmed and unconfirmed** under **“Status”**. They are displayed by type: **Document, SOP, Policy**. The user will be able to see when the task was **completed** under **“Completed Date”**.

The user can use the **“Search field”** within this sub-menu to narrow down the search results to specific document or policy they completed or need to complete.

Item	Status	Issued Date	Completed Date
Policy POLICIES 602: Policy on Travel, Memberships, Internal and External Boards and Committees, and Sponsorships (v1.0) Authorized	Confirmed	21-Jan-2022	21-Jan-2022
Document POLICIES 1124: Confidentiality & Ethics Statement Form (v1.1) Authorized	Confirmed	21-Jan-2022	21-Jan-2022
Policy HR 1905: POLICY: Social Media (v1.0) Authorized	Confirmed	21-Jan-2022	21-Jan-2022
Policy POLICIES 310: SHL Employee Handbook (v7.0) Authorized	Confirmed	21-Jan-2022	31-Aug-2022
Policy QA 211: Nonconforming Event (NCE) Management (v8.0) Authorized	Confirmed	21-Jan-2022	21-Jan-2022
Policy QA 2: Quality Management Plan (v21.1) Authorized	Confirmed	21-Jan-2022	21-Jan-2022
Document HR 1267: Organizational Chart EHD (v7.0) Under Review	Confirmed	03-Mar-2022	07-Mar-2022

For Help

While using iPassport, if you need help:

1. Reach out to your supervisor and/or SHL Quality Systems Manager.
2. You may consult the **“User Guides”**, which you can find on **the Sidebar** in the *Simple View* and as part of the **Global Menu** in the *Detailed View*



NOTE: Please DO NOT reach out to the staff whose email addresses are listed under the *Who Can Help Me?* Tab in the Help Section (Need Help Section). This is an outdated feature at the SHL.

Logout

To log out of iPassport, you simply click the Log-out Icon found on the **Sidebar** both in the Simple and Detailed views.

