IOWA

State Hygienic Laboratory

iPassport Basics

Training Supplemental Guide

By

State Hygienic Training & Education Team

Laina Edwards, MME, Training and Education Supervisor Kasey McCusker, M.S, Training Coordinator Katharine Harman, M.S, Training Coordinator Saadia Oulamine, M.S, Training Coordinator

November 2022



TABLE OF CONTENTS

Logging Into iPassport	3
iPassport Main Operation Modes: Simple & Detailed Views	
Notices	5
Search Feature	7
Favorites	
Tasks	
Documents	12
History	12
My Profile	13
For Help	14
Logout	15

The University of Iowa prohibits discrimination in employment, educational programs, and activities on the basis of race, creed, color, religion, national origin, age, sex, pregnancy, disability, genetic information, status as a U.S. veteran, service in the U.S. military, sexual orientation, gender identity, associational preferences, or any other classification that deprives the person of consideration as an individual. The university also affirms its commitment to providing equal opportunities and equal access to university facilities. For additional information on nondiscrimination policies, contact Office of Institutional Equity, the University of Iowa, 202 Jessup Hall, Iowa City, IA 52242-1316, 319-335-0705, <u>oie-ui@uiowa.edu</u>.



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): <u>https://ishl.ipassportgms.com/</u>

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



2. Click "Sign-in with SAML"

𝔇 Genial Compliance iPassport × +		✓ –	Ø
← → C ^e		ie ★ 1	
iPassport "		lowa State Hygienic Laboratory	
	Sign in with SAML		

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

The University of Iowa prohibits discrimination in employment, educational programs, and activities on the basis of race, creed, color, religion, national origin, age, sex, pregnancy, disability, genetic information, status as a U.S. veteran, service in the U.S. military, sexual orientation, gender identity, associational preferences, or any other classification that deprives the person of consideration as an individual. The university also affirms its commitment to providing equal opportunities and equal access to university facilities. For additional information on nondiscrimination policies, contact Office of Institutional Equity, the University of Iowa, 202 Jessup Hall, Iowa City, IA 52242-1316, 319-335-0705, <u>oie-ui@uiowa.edu</u>.

4





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

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)

	Welcome Bill	Q	iPassoort"vass	ia Dalmini	🛛 Natice	board 📓 Tasks 🕍 Me	trics 🛱 Calendar	🛿 User I
Search iPassport	Q All Organisational Units				Qualty Management	Laboratory Records	Conpellency	Lab
You do not have any unread important notices. 11 View all notices		Faories	Detailed	View				
fou have no outstanding tasks 🖒		Hy itses	Detaneu	(🖷	Passport "/			
IGED HEID?		D icurrents		C	Document Central and Compliance Management Wielcome Saadia			
		9 Haor		Search iPassport	Q All Organizational Units		v	
		Suff Roomers	You do not have any unre Wew al nations	ead important notices				
			You have no outstanding	i tasks 🖒				
		_						
		Logout	Need Help? Click here for user guides and support					
		O My Frede						
		3						
		Simple Vew			Ineo Stato Humanin Laboratory			

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



☆ Home	FILTER: All	Unread Read System
	Notices	
Q	Created by	Title
search	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
avontes	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.

~			Mithoused Minds in Name Wildow		
	IPassoo	You have 2 highlighted notices	*		
		POLICIES 1907: Addime External Note to OpenEUS for Corrected Reports		and the	
	Arrestore	CHINE (S. MIRTH SORDIN			
		This new policy was strated due to a finding them the APRA-LAP appropriate in Couplete. Please review and Olicy the new process when sensitivating sensitivation of port 20.2.			Britter
my looks		Policy When and report news to be serviced for victative reason, a dear destribution or internative charges shall be inducted or the content report. This policy applies to coll complexity to call policy applies to coll.			
-	Important Note				
ALC: NOT THE OWNER				and set in .	toquane
	0 1700981		I have read this radius	bep and a	21 540
5	Other Machine				
	Other Nodews				
- 66					
and it	Distant Database	Concernation of the Post income strain from a state from the second	1	1 14 32.0	816
	Daniel County	SCP on Landak ICC 1014 Lawrence Disease Construction for the NOVE - Torget Terms		1.5.1.110	414
	Densil Assess	Teaser with the SRT 1986 Page Director		8.5.y.21123	412

Others can be found in the "Noticeboard" area.

To access the Noticeboard in Simple View, click "View all notices" on the Home page.

	of Genial Com	pliance iPassport × +		
←	\rightarrow G	https://ishl.ipassportqms.com/desktop/simple_view/landing_page		
A Home				
Q Search			A Pass	port ""
Favorites			Welcom	e Saadia
My Tasks			Search iPassport Q	All Organizational Units
D ocuments	You c	do not have any unread important notices		

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

	-
A Home	
Q Search	
Favorites	
My Tasks	
Documents	You do not have any unread import:
) History	You have no outstanding tasks 🖒
Staff Absences	Need Help? Click here for user guides and support

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**

	«v/landing_page A ^A Q ta	🕫 🕀 🕤 (Not syncing 🚯 …
You do not have any unread important notices [™] Wer al notes You have no outstanding tasks Need Help? Cits here for any paties and appart	CODE Code	
Home Q Search	4.3.2.2.b SOP Annual Review : ISO/IEC 17025:2005(E): 4.3.2.2.b: 2017 ORELA Quality Assurance Non Compliance - 4.3.2.2.b SOP Annual Review	SOP P On-Site CV
Favorites	The review frequency for drinking water SOPs will be revised to	



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.





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			
P	•		q												
Request Change	PDF Prev	view Com	pare with v2.0												
													Page 1		of 5



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*.

The University of Iowa prohibits discrimination in employment, educational programs, and activities on the basis of race, creed, color, religion, national origin, age, sex, pregnancy, disability, genetic information, status as a U.S. veteran, service in the U.S. military, sexual orientation, gender identity, associational proferences, or any other classification that deprives the person of consideration as an individual. The university also affirms its commitment to providing equal opportunities and equal access to university facilities. For additional information on nondiscrimination policies, contact Office of Institutional Equity, the University of Iowa, 202 Jessup Hall, Iowa City, IA 52242-1316, 319-335-0705, <u>oie-ui@uiowa.edu</u>.



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**).

User Details	Change Password or Pin	Skills	Preferences	
User Details				



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.

Search	n										
Searc	ch Skills										
Status		Date		is after		is before	s	skill Type		Attachm	ents?
		✓ Issued	~						~		
Show I	Inactive Items?	Show Delete	ed Skills?								
Exclud	de Inactive Items	✓ Exclude De	leted Skills 🗸								
Sea	rch Results										
											A D
										-	✓ R(
	Item							- 6	Status	ssued Date	Comple
	Item Policy POLICIES	602: Policy on Travel	.Memberships, Intern	nal and External Boards	and Committees,.	and Sponsorships (v1.0)) Authorized		Status Confirmed	Issued Date	Complet 21-Jar
	Item Policy POLICIES Document POLIC	602: Policy on Travel	. Memberships, Intern	nal and External Boards It Form (v1.1) Authorize	and Committees,.	and Sponsorships. (v1.0,) <u>Authorized</u>		Status Confirmed Confirmed	21-Jan-2022	Complet 21-Jar 21-Jar
	Item Policy POLICIES Document POLIC Policy HR 1905: P	602: Policy on Travel ES 1124: Confidential OLICY: Social Media	.Memberships, Intern ity & Ethics Statemen (v1.0) Authorized	nal and External Boards at Form <i>(v1.1)</i> Authoriz e	e and Committees, .	and Sponsorships (v1.0,) Authorized		Status Confirmed Confirmed Confirmed	21-Jan-2022 21-Jan-2022 21-Jan-2022	Complet 21-Jar 21-Jar 21-Jar
	Item Policy POLICIES Document POLIC Policy HR 1905 P Policy POLICIES	602: Policy on Travel ES 1124: Confidential DLICY: Social Media (10: SHL Employee H	. Memberships. Intern ity & Ethics. Statemen (v1.0) Authorized andbook. (v7.0) Author	aal and External Boards at Form (v.f. f.) Authorize prized	e and Committees, .	and Sponsorships.(v1.0) Authorized		Status Confirmed Confirmed Confirmed Confirmed	Issued Date 21-Jan-2022 21-Jan-2022 21-Jan-2022 21-Jan-2022	Comple 21-Jan 21-Jan 21-Jan 31-Au
	Item Policy POLICIES Document POLIC Policy HR 1905: P Policy POLICIES Policy QA211: No	602. Policy on Travel ES 1124. Confidential OLICY. Social Media . 10. SHL Employee H 1conforming Event (N	Memberships, Intern ity & Ethics Statemen (v1.0) Authorized andbook. (v7.0) Author CE) Management. (v8	hal and External Boards at Form (v1.1) Authorize prized	ed	and Sponsorships (v1.0,) <u>Authorized</u>		Status Confirmed Confirmed Confirmed Confirmed	ssued Date 21-Jan-2022 21-Jan-2022 21-Jan-2022 21-Jan-2022 21-Jan-2022 21-Jan-2022 21-Jan-2022	Re Complet 21-Jar 21-Jar 21-Jar 31-Aug 21-Jar
	Item Policy POLICIES Document POLIC Policy HR 1905 P Policy OA211 No Policy OA2 Quality	602: Policy on Trave) ES 1124: Confidential OLICY: Social Media (10: SHL Employee H 1conforming Event (N y Management Plan (Memberships_Intern ity & Ethics_Statemen (v1.0) Authorized andbook. (v7.0) Author (v8 (c1) Management (v8 v21.1) Authorized	al and External Boards at Form (v1.1) Authorize prized	and Committees, and Committees, and Committees, and Committees, and Committees, and Committees, and Committees	and Sponsorships (v1.0).Authorized		Status Confirmed Confirmed Confirmed Confirmed Confirmed	 ssued Date s1-Jan-2022 1-Jan-2022 1-Jan-2022 1-Jan-2022 1-Jan-2022 1-Jan-2022 1-Jan-2022 	Complet 21-Jar 21-Jar 21-Jar 31-Au 21-Jar 21-Jar

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 <u>Simple View</u> and as part of the **Global Menu** in the <u>Detailed View</u>







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

Logout

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

