

Information Technology Services



Degree Works Major Upgrade Test Plan 5.0.2

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Test Plan for Degree Works

General Testing Instructions

Introduction

This test plan provides multiple baseline best practices related to Degree Works testing after upgrade. The test plan is intended for functional users and is organized by user type.

In order to thoroughly test, we ask that you not only follow your normal business practices and processes related to Degree Works, but please try multiple scenarios that you might not encounter often in an effort to identify anomalies and/or issues in the application.

Degree Works is primarily a web-based application. Please test all functionality using a variety of browsers, including Internet Explorer, Google Chrome, Firefox, and Safari.

This generic test plan can and should be modified to reflect the unique localizations and customizations that are part of your Degree Works environment, as well as local business practices.

Prerequisites for Functional Testing

Working knowledge of Degree Works applications will vary by user class. At minimum, the SuperUSER should complete a thorough review of all release related documentation, particularly the Release Guide and the Problem Resolution documentation

Knowledge of outstanding pre-upgrade related issues (with ITS and/or Ellucian). A section is provided at the end of this test plan for testing campus known issues

Prerequisites

Information about prerequisites for testing is provided in the Ellucian Upgrade Guide.

Certification

Degree Works is certified by Ellucian at all supported release levels.

Using a Test Environment

Testing should be conducted in your Degree Works TEST environment.

Collecting and Reporting Results during Testing

Compile your test results for analysis, issue resolution, and for comparison when upgrading your Degree Works production environment.

- Copy error message when applicable
- Provide a screenshot when possible

Generic Test Plan Contents

Generic test plans are created for the most recent baseline version of the application and are not considered final documentation nor are they considered an authoritative source.

A thorough review of all release related documentation is a prerequisite for use of this generic test plan.

Users

Identify one or more tester(s) from each of the following roles:

SuperUSER (DW Manager)

Registrar's Office (REG class)

Academic Advisor (ADV and ADVX if applicable)

Student (STU class)

Other Institutional Needs

Special Notes for Degree Works 5.0.2

New user keys are required for some functionalities in Degree Works 5.0.2. Below is a list of resources recommended for review ahead of configuration and testing.

Degree Works 5.0.2 Upgrade/Install Master Article

<https://ellucian.force.com/clients/s/article/Degree-Works-5-0-2-Upgrade-Install-Master-Article>

Degree Works 5.0.2 Ellucian Content Pack

<https://ellucian.force.com/clients/s/contentdocument/0691M000005PwsX>

If you need access to the Ellucian Customer Center, please contact the ITS Helpdesk at Helpdesk@usg.edu.

Student Testers (STU)

Setup for Testing

1. Student users will test in the Degree Works Dashboard and the new Responsive Dashboard.
2. Student users should log in with their Single Sign-On (SSO) credentials.

Dashboard

Confirm access to Degree Works in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following tabs:

- | | |
|--|-----------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> GPA Calc |
| <input type="checkbox"/> Plans | |

Complete each of the following:

- Save your audit as a PDF
- Use the “What-If” function to render a hypothetical audit
- Add courses in “Look Ahead”, choose “Process New”, and view the audit
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following links through the header bar or the Mega Menu:

- | | |
|--|-----------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> GPA Calc |
| <input type="checkbox"/> Plans | |

Complete each of the following:

- Print your audit
- Save your audit as a PDF
- Use the “What-If” function to render a hypothetical audit
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Advisor Testers (ADV)

Setup for Testing

1. Advisor users will test in the Degree Works dashboard and the new Responsive Dashboard.
2. Advisor users should log in with their Single Sign-On (SSO) credentials.

Dashboard

Confirm access to Degree Works in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following tabs:

- | | |
|--|-----------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> GPA Calc |
| <input type="checkbox"/> Plans | <input type="checkbox"/> Notes |

Complete each of the following:

- Enter a student ID to select a student
- Use the “Find” feature to search for and select a student
- Save an audit as a PDF
- Use the “What-If” function to render a hypothetical audit
-
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”
- Refresh an audit and Process New
- Add a note, delete a note

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following links through the header bar or the Mega Menu:

- | | |
|--|-----------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> GPA Calc |
| <input type="checkbox"/> Plans | <input type="checkbox"/> Notes |

Complete each of the following:

- Enter a student ID to select a student
- Use the “Find” feature to search for and select a student
- Save an audit as a PDF
- Use the “What-If” function to render a hypothetical audit

-
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”
 - Refresh an audit and Process New
 - Add a note, delete a note

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title

Advisor Testers – with exceptions (ADVX)

Setup for Testing

1. Advisor users will test in the Degree Works dashboard and the new Responsive Dashboard.
2. Advisor users should log in with their Single Sign-On (SSO) credentials.

Dashboard

Confirm access to Degree Works in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following tabs:

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Plans | <input type="checkbox"/> Exceptions |
| <input type="checkbox"/> GPA Calc | |

Complete each of the following:

- Enter a student ID to select a student
- Use the “Find” feature to search for and select a student
- Save an audit as a PDF
- Use the “What-If” function to render a hypothetical audit
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”
- Refresh an audit and Process New
- Add a note, delete a note
- Add an exception and run new audit
- Remove an exception and run new audit

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following links through the header bar or the Mega Menu:

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Plans | <input type="checkbox"/> Exceptions |
| <input type="checkbox"/> GPA Calc | |

Complete each of the following:

- Enter a student ID to select a student
- Use the “Find” feature to search for and select a student
- Save an audit as a PDF

- Use the "What-If" function to render a hypothetical audit
- Complete a GPA calculation with "Graduation Calculator", "Term Calculator", and "Advice Calculator"
- Refresh an audit and Process New
- Add a note, delete a note
- Add an exception and run new audit
- Remove an exception and run new audit

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title

Registrar Testers (REG)

Setup for Testing

1. Registrar users will test in the Degree Works dashboard and the new Responsive Dashboard. (For REG users who access other Degree Works applications, refer to SuperUSER testing.)
2. Registrar users should log in with their Single Sign-On (SSO) credentials.

Dashboard

Confirm access to Degree Works Dashboard in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following tabs:

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Plans | <input type="checkbox"/> Exceptions |
| <input type="checkbox"/> GPA Calc | |

Complete each of the following

- Enter a student ID to select a student
- Use the “Find” feature to search for and select a student
- Save an audit as a PDF
- Use the “What-If” function to render a hypothetical audit
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”
- Refresh an audit and Process New
- Add a note, delete a note
- Add an exception and run new audit
- Remove an exception
- Create a new plan for a student
- Modify a plan for a student
- Add, Modify, and Delete a Petition for a student

Exception Management

- Confirm access through top ribbon
- Manage, apply, and approve petitions
- Run exceptions report

Template Management (For use with the Student Educational Planner—SEP)

- Confirm access
- Create new template
- Add a course requirement
- Add a non-course requirement
- Save template

- Modify a template

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Internet Explorer
- Chrome
- Firefox
- Other: _____

Confirm access to each of the following links through the header bar or the Mega Menu:

- Worksheets (default initial view)
- Plans
- GPA Calc
- Notes
- Exceptions

Complete each of the following:

- Enter a student ID to select a student
- Use the "Find" feature to search for and select a student
- Save an audit as a PDF
- Use the "What-If" function to render a hypothetical audit
- Complete a GPA calculation with "Graduation Calculator", "Term Calculator", and "Advice Calculator"
- Refresh an audit and Process New
- Add a note, delete a note
- Add an exception and run new audit
- Remove an exception
- Create a new plan for a student
- Modify a plan for a student
- Add, Modify, and Delete a Petition for a student

Exception Management

- Confirm access through top ribbon
- Manage, apply, and approve petitions
- Run exceptions report

*Template Management can only be accessed through the Dashboard in Degree Works 5.0.2.

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title

SuperUSER Testers

Setup for Testing

1. SuperUSERS will test in Degree Works Dashboard, Responsive Dashboard, Scribe, DWShell, Composer, PC Tools Transit, and Web Transit.
2. SuperUSERS should log in to Composer, Dashboard, Responsive Dashboard, Scribe, and DWShell with their Single Sign-On (SSO) credentials.
3. Access to PC Tools Transit will remain through PC Tools.

Composer

Confirm access to Composer in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Dashboard

Confirm access to Degree Works Dashboard in each browser:

- | | |
|--|---------------------------------------|
| <input type="checkbox"/> Internet Explorer | <input type="checkbox"/> Firefox |
| <input type="checkbox"/> Chrome | <input type="checkbox"/> Other: _____ |

Confirm access to each of the following tabs:

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Worksheets (default initial view) | <input type="checkbox"/> GPA Calc |
| <input type="checkbox"/> Plans | <input type="checkbox"/> Notes |
| <input type="checkbox"/> Admin (for Web Analyze) | <input type="checkbox"/> Exceptions |

Complete each of the following

- Enter a student ID to select a student
- Use the "Find" feature to search for and select a student
- Save an audit as a PDF
- Use the "What-If" function to render a hypothetical audit

- Complete a GPA calculation with "Graduation Calculator", "Term Calculator", and "Advice Calculator"
- Refresh an audit and Process New
- Add a note, delete a note
- Add an exception and run new audit
- Remove an exception
- Create a new plan for a student
- Modify a plan for a student
- Add, Modify, and Delete a Petition for a student

Exception Management

- Confirm access through top ribbon

- Manage, apply, and approve petitions
- Run exceptions report

Template Management (For use with the Student Educational Planner—SEP)

- Confirm access through top ribbon
- Create new template
- Add a course requirement
- Add a non-course requirement
- Save template
- Modify a template

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Internet Explorer
- Chrome
- Firefox
- Other: _____

Confirm access to each of the following links through the header bar or the Mega Menu:

- Worksheets (default initial view)
- Plans
- GPA Calc
- Notes
- Exceptions
- Admin (For Web Analyze)

Complete each of the following

- Enter a student ID to select a student
- Use the “Find” feature to search for and select a student
- Save an audit as a PDF
- Use the “What-If” function to render a hypothetical audit
- Complete a GPA calculation with “Graduation Calculator”, “Term Calculator”, and “Advice Calculator”
- Refresh an audit and Process New
- Add a note, delete a note
- Add an exception and run new audit
- Remove an exception
- Create a new plan for a student
- Modify a plan for a student
- Add, Modify, and Delete a Petition for a student

Exception Management

- Confirm access through top ribbon
- Manage, apply, and approve petitions
- Run exceptions report

*Template Management can only be accessed through the Dashboard in Degree Works 5.0.2.

Scribe

Confirm access to Degree Works Scribe in each browser:

- Internet Explorer
- Chrome

Firefox Other

Complete each of the following:

 Open a new block Search blocks Parse a block Save a block Make a change to a block—parse, save, and ensure the change appears in a student audit.

DWSHELL

Confirm access to DWSHELL in each browser:

 Internet Explorer Chrome Firefox Other

Confirm access to each of the following tabs:

 Shepentry Surecode

PC TOOLS TRANSIT

 Confirm access through PCTools Confirm ability to run and view a report

WEB TRANSIT

Confirm access to Web Transit in each browser:

 Internet Explorer Chrome Firefox Other Confirm ability to run and view a report

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title

Other Items for Consideration and Testing

Other Items for Consideration and Testing

In consideration of your unique Degree Works environment and your institutional business practices, review the following items and test if applicable. Some of these items may require review of your institution's Surecode and Shepentry settings.

Degree Works Features

- Athletic Eligibility Audit
- Servicemembers Opportunity Colleges (SOC) Audit
- Course Program of Study (CPoS)
- Transfer Equivalency
- Degree Works Prerequisite Checking
- Banner XE Registration

Audit Features

- Transfer credit
- Graduate student audits
- Dual majors and/or degrees
- Multiple minors and/or majors
- Minimum grade requirements
- Insufficient grades
- Incomplete grades
- Overall GPA calculations
- Major GPA calculations
- Overall hours calculations
- Repeatable courses (i.e., music classes, seminars)
- Repeated courses
- Cross-listed courses
- Student attributes
- Course attributes
- Sharing Rules
- Hidden requirements in Scribe blocks (old courses, changed disciplines, etc.)
- Other unique Scribe scenarios used at your institution

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues, in detail, here:

Signature

Title
