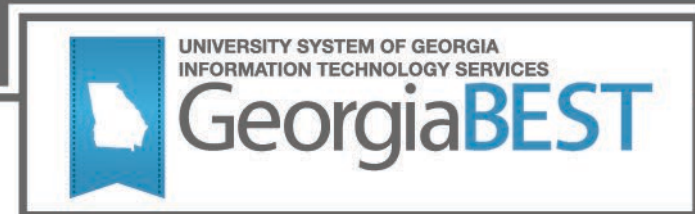


Information Technology Services



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 an upgrade. The test plan is intended for functional users and is organized by user type (Degree Works User Class).

In order to thoroughly test, we ask that you follow your normal business practices and processes related to Degree Works and also 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 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@usq.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:

- Chrome Firefox Other: _____

Confirm access to each of the following tabs:

- Worksheets Plans GPA Calc

Complete each of the following:

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

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Chrome Firefox Other: _____

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

- Worksheets Plans GPA Calc

Complete each of the following:

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

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues in detail and attach.

Signature _____

Advisor Testers – without 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:

- Chrome Firefox Other: _____

Confirm access to each of the following tabs:

- Worksheets Plans GPA Calc Notes

Complete each of the following:

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

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Chrome Firefox Other: _____

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

- Worksheets Plans GPA Calc Notes

Complete each of the following:

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

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues in detail and attach.

Signature _____

Advisor Testers – with exceptions (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:

- Chrome Firefox Other: _____

Confirm access to each of the following tabs:

- Worksheets GPA Calc Exceptions
 Plans Notes

Complete each of the following:

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

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Chrome Firefox Other: _____

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

- Worksheets GPA Calc Exceptions
 Plans Notes

Complete each of the following:

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

Testing successful? (circle one) Yes/No

If testing was unsuccessful, please explain issues in detail and attach.

Signature _____

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:

- Chrome Firefox Other: _____

Confirm access to each of the following tabs:

- Worksheets GPA Calc Exceptions
 Plans Notes

Complete each of the following

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

Exception Management

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

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

- | | |
|---|---|
| <input type="checkbox"/> Confirm access | <input type="checkbox"/> Add a non-course requirement |
| <input type="checkbox"/> Create new template | <input type="checkbox"/> Save template |
| <input type="checkbox"/> Add a course requirement | <input type="checkbox"/> Modify a template |

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Chrome Firefox 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"/> Plans | <input type="checkbox"/> Notes |
| | <input type="checkbox"/> GPA Calc | <input type="checkbox"/> Exceptions |

Complete each of the following:

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

Exception Management

- | | |
|---|--|
| <input type="checkbox"/> Confirm access through top ribbon | <input type="checkbox"/> Run exceptions report |
| <input type="checkbox"/> Manage, apply, and approve petitions | |

*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 and attach.

Signature _____

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:

- Chrome Firefox Other: _____

Dashboard

Confirm access to Degree Works Dashboard in each browser:

- Chrome Firefox Other: _____

Confirm access to each of the following tabs:

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

Complete each of the following

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

Exception Management

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

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

- | | |
|--|---|
| <input type="checkbox"/> Confirm access through top ribbon | <input type="checkbox"/> Add a non-course requirement |
| <input type="checkbox"/> Create new template | <input type="checkbox"/> Save template |
| <input type="checkbox"/> Add a course requirement | <input type="checkbox"/> Modify a template |

Responsive Dashboard

Confirm access to the Responsive Dashboard in each browser:

- Chrome Firefox Other: _____

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

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

Complete each of the following

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

Exception Management

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

*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:

- Chrome Firefox Other: _____

Complete each of the following:

- | | |
|---|--|
| <input type="checkbox"/> Open a new block | <input type="checkbox"/> Make a change to a block—parse, save, and ensure the change appears in a student audit. |
| <input type="checkbox"/> Search blocks | |
| <input type="checkbox"/> Parse a block | |
| <input type="checkbox"/> Save a block | |

DWSHELL

Confirm access to DWSHELL in each browser:

- 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:

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 and attach.

Signature _____

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 and attach.

Signature _____