Degree Works Major Upgrade Test Plan 5.0.4

Contents

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

Please 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 5.0.4

New user keys may be required for some functionalities in Degree Works 5.0.4. Below is a list of resources recommended for review ahead of configuration and testing.

Degree Works 5.0.4 Upgrade/Install Master Article

https://ellucian.force.com/clients/s/article/Degree-Works-Install-Upgrades-Master-Article

Degree Works 5.0.4 Ellucian Content Pack

https://ellucian.force.com/clients/s/contentdocument/0691M00000B6IPg

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 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
☐ 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:

☐ 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
☐ 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 and attach.

Signature _____

Advisor Testers – without exceptions (ADVX)

Setup for Testing

1. Advisor users will test in the Degree Works dashboard and the 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

☐ 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

☐ Chrome   ☐ Firefox   ☐ Other:_____

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

☐ Worksheets   ☐ Plans   ☐ GPA Calc

☐ No test

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 and attach.

Signature _____

Advisor Testers – with exceptions (ADV)

Setup for Testing

1. Advisor users will test in the Degree Works dashboard and the 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:

☐ 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

☐ 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:

☐ 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 and attach.

Signature _____

Registrar Testers (REG)

Setup for Testing

1. Registrar users will test in the Degree Works dashboard and the ~~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:

☐ 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 templtate

Responsive Dashboard

Confirm access to 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 (default initial view)   ☐ Plans   ☐ Notes

☐ GPA Calc   ☐ 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 5.0.4.

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:

☐ 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:

☐ 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:
- ☐ 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 5.0.4

Scribe

Confirm access to Degree Works Scribe in each browser:

☐ 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 the student audit

Controller

Confirm access to Controller in each browser:

☐ Chrome ☐ Firefox ☐ Other:_____

Confirm access to each of the following tabs:

☐ Users ☐ Groups ☐ Configurations

Web Transit

Confirm access to Web Transit in each browser:

☐ Chrome ☐ Firefox ☐ Other:_____

☐ Confirm access through PTools
☐ Ensure you can run and view a report

Testing successful? (circle one) Yes/No
If testing was unsuccessful, please explain issues in detail and attach.

Signature _____

Pending Defect Correction and Known Issues

Campus Pending Defect Correction and Known Issues

Use this section to document and perform testing related to open pending defects and/or known issues in your current Degree Works environment. Careful review of open pending defect correction and/or known issues with ITS and/or Ellucian is recommended.

Note: Comparison of pending defects and/or known issues to the Ellucian Problem Resolutions document for your Degree Works release level is recommended.

Pending Defect Correction and/or Known Issues

_____

_____

_____

_____

_____

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_____

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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
- ☐ 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 _____