

Information Technology Services



Test Plan for Georgia Banner Enhanced Systems

**Course Attribute Dashboard
Banner Components for INGRESS
Academic Georgia Requirements
Applicant Referral Process
D2L Extract Process**

Version 8.68 and 9.18

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Test Plan for Georgia Enhancements 8.68 and 9.18

General Testing Instructions

Introduction

This beta test plan is for certifying the following:

- Course Attribute Dashboard
 - Course Attribute Group Validation Code page (ZTVCAGC)
 - Course Attribute Roles Validation Code page (ZTVCADR)
 - Course Attribute Dashboard Administration page (ZSACADA)
 - Course Attribute Dashboard Admin Report (ZSRCDAR)
 - Course Attribute Dashboard User Load process (ZSRCDUL)
 - Course Attribute Dashboard Self-Service pages
 - Course Attribute Dashboard Transaction Report (ZSRCDTR)
- Intermediate Table for Ingress (INGRESS Log Table) (ZSRSMGL)
- Non Banner Finance Data Load (ZGRPSLD)
- Legislative Requirements Update Process (ZORLHCR)
- Applicant Referral Process (ZORAPRF)
- D2L Extract Process (ZSRD2LC)

Testing should be performed to validate the functionality being delivered with this release. In order to test this release thoroughly, we ask that you not only follow your normal business practices and processes to see if the modification runs correctly, but please try multiple scenarios that you may not encounter often in an effort to identify any anomalies in the process.

The most current test plans are available by module on the GeorgiaBEST website at:

http://www.usg.edu/georgia_best/application_development_and_support/banner/userdocs

Prerequisites

The only prerequisite for Georgia Enhancements 8.68 is Georgia Enhancements 9.18. Georgia Enhancements 9.18 must be installed prior to installing 8.68.

The prerequisites for the Georgia Enhancements 9.18 release are:

- Admin Common 9.3.19
 - Student 9.3.17
- Georgia Enhancements 9.13

Certification

This release has been certified by ITS at the following versions:

- Admin Common 9.3.24
 - Accounts Receivable 9.3.18
 - Financial Aid 9.3.25
 - General 9.3.19
 - Student 9.3.23
- Georgia Enhancements 8.67 and 9.17

ITS is in the process of testing and certifying this release for the prerequisites at Oracle 12.2 and 19c on Red Hat Enterprise Linux (RHEL) 7.x.

Using a Test Environment

This release must be placed into a test environment. Do not place or run any of the items contained in this release in a production environment until test results are compiled for all test sites and any necessary corrections are made.

Support for Testing

During the testing process, contact us at ban_test@usg.edu or by phone at 706-583-2001 (rather than contacting the ITS Helpdesk).

Explain that you are a beta test site. Your call will be forwarded to the appropriate staff member. Make sure you explain that you are testing and not requesting customer support.

Returning Test Results

When testing is complete, return the completed test plan as an email attachment to ban_test@usg.edu.

Course Attribute Dashboard

Purpose

The new Course Attribute Dashboard provides faculty, registrars, and other staff responsible for maintaining course section data the ability to request attribute changes through Banner Self-Service. Administrative setup allows grouping of attribute codes for processing, assigning dashboard user roles, and tailoring user specific course access. Approval functionality and email notifications are also features of the dashboard.

The Course Attribute Dashboard includes the following:

- Course Attribute Group Validation Code page (ZTVCAGC)
- Course Attribute Roles Validation Code page (ZTVCADR)
- Course Attribute Dashboard Administration page (ZSACADA)
- Course Attribute Dashboard Admin Report (ZSRCDAR)
- Course Attribute Dashboard User Load process (ZSRCDUL)
- Course Attribute Dashboard Self-Service pages
- Course Attribute Dashboard Transaction Report (ZSRCDTR)

Training

Training is available on the GeorgiaBEST Website. For Course Attribute Dashboard video resources, please follow the link below to the “Banner Student – Course Attribute Dashboard” section under Specialized Training on the GeorgiaBEST Training page.

[CAD Training Videos](#)

Testing

For complete Set-up and Testing Steps for the Course Attribute Dashboard, see the following Test Plan:

[Course Attribute Dashboard](#)

Course Attribute Group Validation Code page (ZTVCAGC)

ZTVCAGC Purpose

The Course Attribute Group Validation page (ZTVCAGC) is used to identify course attribute groups associated with the Course Attribute Dashboard. For instance, a campus department may create a study abroad course attribute group. This page allows for the entry of a code and description.

Functional Impact

The new ZTVCAGC page allows the entry of an 8-character Code and a 60-character Description.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

Course Attribute Roles Validation Code page (ZTVCADR)

ZTVCADR Purpose

The Course Attribute Roles Validation page (ZTVCADR) allows for the creation of role codes associated with the Course Attribute Dashboard. In addition to a role code and description, users will identify whether the role falls into the following categories:

1. Global Administrator (overall CAD administrator)
2. Group Administrator (maintain attribute groups and user roles)
3. Approver (approve attribute changes)
4. Maintainer (request attribute changes)
5. Reviewer (view only access)

Functional Impact

The new ZTVCADR page allows the entry of a 12-character Role Code and a 60-character Description. For each record added to the page, at least one of the role indicators must be checked. Multiple indicators may be checked for each record.

Attribute role codes should be established for each attribute group to ensure proper permissions and dashboard request processing. At minimum, roles should be established for a maintainer (to request changes via the dashboard) and a group administrator with approver access (to approve requests and perform transaction and administration functions for the attribute group).

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

Course Attribute Dashboard Administration page (ZSACADA)

ZSACADA Purpose

The Course Attribute Dashboard Administration page (ZSACADA) is the primary page for the following actions associated with the Course Attribute Dashboard:

- Create attribute groups for a set of attribute codes
- Attach user roles to the attribute group
- Create dashboard users and assign user roles
- Establish user access to courses (assigned only or specify department and/or courses)
- View dashboard processing by role for the attribute group
- View attribute codes and attribute group assignments for users

Functional Impact

The new ZSACADA page includes following two tabs:

- Attribute Groups
- User Roles and Assignments

The Attribute Groups tab on ZSACADA is divided four sections:

- Attribute Group
- Attribute Roles Attached to Attribute Group
- Attribute Codes
- Dashboard Processing

The Attribute Groups tab > Attribute Groups section displays all group codes and descriptions established on ZTVCAGC and acts as a key block for the Attribute Groups tab. Filtering is allowed in this section, but no records can be inserted, deleted, or copied.

The Attribute Groups tab > Attribute Roles Attached to Attribute Group section allows role codes (validated against ZTVCADR) to be associated with an attribute group. Upon entry of a role code, the other fields in this section will display the role description and role checkbox indicators from ZTVCADR.

The Attribute Groups tab > Attribute Codes section is where attribute codes (validated against STVATTR) are associated with an attribute group.

The Attribute Groups tab > Dashboard Processing section only displays records after roles are assigned to users on the User Roles and Assignments tab. Clicking or scrolling through the Attribute Roles Attached to Attribute Group section results in the Dashboard Processing section displaying the users assigned the selected role. The user's preferred email address from E-mail Address page (GOAEMAL) will be displayed or the message "No Preferred Email Address" if no preferred email exists.

The User Roles and Assignments tab on ZSACADA is divided four sections:

- Dashboard Users
- Assigned Role
- Departments and Courses
- Attribute Codes and Group Assignments

The User Roles and Assignments tab > Dashboard Users section is where user records are created by entering a Banner ID (validated against SPAIDEN). This section will display the ID, name, and preferred email address of all dashboard users. The message "No Preferred Email Address" if no preferred email exists on GOAEMAL. This section acts as a key block for the User Roles and Assignments tab.

The User Roles and Assignments tab > Assigned Role section allows role codes (validated against ZTVCADR) to be assigned to users. Upon entry of a role code, the other fields in this section will display the role description and role checkbox indicators from ZTVCADR. For each role code entered in this section, the Departments and Courses section must be populated.

The User Roles and Assignments tab > Departments and Courses section a user's course access is specified. The Faculty View Assigned Courses Only radio button defaults to No. To allow the dashboard user to access all courses for which they are an assigned instructor, set the radio button to Yes and save the record. To allow a dashboard user access to all courses for a department or specific courses, leave the Faculty View Assigned Courses Only radio button set to No and enter the specific department and/or course information.

The User Roles and Assignments tab > Attribute Codes and Group Assignments section displays the attribute codes available to be used by the dashboard user based on assigned roles.

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

CAD Admin Report (ZSRCDAR)

ZSRCDAR Purpose

The CAD Admin Report (ZSRCDAR) will generate a report of existing records established on the Course Attribute Dashboard Administration page (ZSACADA). This data includes attribute group codes, attribute codes associated with the attribute group, user roles attached to the attribute group, and users with the assigned roles.

Functional Impact

The new ZSRCDAR report can generate a report containing ZSACADA data based on attribute group code, role code, attribute code, or a combination of those values as well as a listing of assigned users.

The .lis file is divided into two sections:

- ATTRIBUTE GROUP AND ATTRIBUTE CODES
- ATTRIBUTE GROUP AND USER ROLES

The ATTRIBUTE GROUP AND ATTRIBUTE CODES section displays the attribute group code, attribute group description, all attribute codes in the group, and attribute description. If an attribute group code exists without attribute codes attached, the message No Attribute Codes will display.

The ATTRIBUTE GROUP AND USER ROLES section displays the attribute group code, user role code, user role description, assigned user ID, and user name. If no role codes or users are associated with the attribute group, the messages No Role Codes or No Users will be displayed.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

CAD User Load Process (ZSRCDUL)

ZSRCDUL Purpose

The CAD User Load Process (ZSRCDUL) will create Course Attribute Dashboard user records on Course Attribute Dashboard Administration page (ZSACADA) for active faculty for a term. The process can be run for a term or for a population selection. If a population is used, the process can be used to create records for campus staff who are not designated as faculty. ZSRCDUL can assign a dashboard user role to a new or existing user. If no preferred email address exists for a user, the ID will be reported in the .lis file section designated for records that are not loaded.

Functional Impact

The new ZSRCDUL process can create new dashboard user records and add roles to users for all active faculty for a term or for a population selection. Parameters allow for creating new users without roles or adding roles to existing users without creating new user records. For any users being processed, a preferred email address must exist on GOAEMAL.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

Course Attribute Dashboard Self-Service pages

Purpose

The Course Attribute Dashboard Self-Service pages provide a method for faculty members and administrative users to enter course attribute data in Banner. Rules and user records established on Course Attribute Dashboard Administration page (ZSACADA) control the user access to courses and attribute codes as well as the user roles.

After selecting a term to process, the Course List page will display any courses available for the user to select and view. The page is divided into sections based on user role: Courses to Review, Courses to Maintain, and Courses to Approve.

Dashboard users with a Reviewer role will use the Courses to Review section of the Course List page to select courses and view the existing course attributes associated with those courses.

Dashboard users with a Maintainer role will use the Courses to Maintain section of the Course List page to select courses to review and update. For the selected courses, a list of available attribute codes will be displayed (based on attribute group assignments). The Maintainer may select one or more attribute codes to add or delete. The requested changes will be stored in a transaction table until a user with the Approver role takes action on the request.

Dashboard users with an Approver role will use the Courses to Approve section of the Course List page to select requested course attribute changes to approve, deny, or send back to the Maintainer for further action.

Email functionality is controlled by Crosswalk Validation page (GTVSDAX) rules for Codes CADADDRESS, CADNAME, CADSERVER.

Functional Impact

A new “Course Attribute Dashboard” link has been added to the bottom of the Faculty and Advisors menu (bmenu.P_FacMainMnu) in Self-Service Banner 8.x. Institutions may relocate this link to a more appropriate position or add the link to the 9.x Self-Service page.

Information text on the new Self-Service pages can be customized using Web Tailor (search for ZWSKCADB).

To utilize the communication components of the dashboard, an institutional email server is needed. Settings related to the email server and sender email address will be established on Crosswalk Validation page (GTVSDAX). An ITS delivered script inserted three records for Group COURSEATTRDASHBOARD (Codes CADADDRESS, CADNAME, CADSERVER). These records must be updated to replace the words “UPDATE_ME” in the Comments field with a campus specific value prior to using the dashboard.

Refer to the Course Attribute Dashboard Workbook for functionality details.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

CAD Transaction Report (ZSRCDTR)

ZSRCDTR Purpose

The CAD Transaction Report (ZSRCDTR) will allow users to generate a report of in-progress or completed actions performed via the Course Attribute Dashboard.

Functional Impact

The CAD Transaction Report (ZSRCDTR) generates a report of in-progress or completed actions performed via the dashboard. The report uses transactional data (ZSTCADT table) to report in-progress records and the audit history data (ZSBCADH table) to report completed actions.

Based on the combination of parameters entered, the report can generate a variety of output including, but not limited to, the following:

- All in-progress actions for term
- All completed actions for term
- All in-progress and completed actions for term
- All in-progress actions for user
- All in-progress actions for user and attribute codes
- Approved actions for a user
- Denied actions for a date range

The process generates .lis and .log files. The .lis file contains a listing of records processed and the .log file contains processing logic details for technical troubleshooting purposes.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Course Attribute Dashboard](#)

Intermediate Table for Ingress (INGRESS Log Table) (ZSRSMGL)

Purpose

The ZSRSMGL table is an intermediate table used to log issues with the ZSRSMG1 and ZSRSMG2 packages.

Functionality delivered with this release:

Enhancements:

- Added the ZSRSMGL_REGENTS_TERM_CODE, ZSRSMGL_TERM_CODE, and updated the ZSRSMGL_BANNER_TERM_CODE in the ZSRSMGL table.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Banner Components for Ingress](#)

Non Banner Finance Data Load (ZGRPSLD)

Purpose

The Non Banner Finance data load (ZGRPSLD) writes the accounting records in Banner to PeopleSoft Financials. The process selects the data found in GURFEED and loads the data into the PeopleSoft JGEN_BNR_BOR staging table.

Functionality delivered with this release:

Enhancements:

- Added control report information to the .lis file and removed from the .log file
- Updated the hint text on the date format to MM/DD/YYYY
- Updated the Name to capital letters for consistency

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[AR End of Day](#)

Legislative Requirements Update Process (ZORLHCR)

Purpose

The Legislative Requirement Update Process (ZORLHCR) evaluates successful completion of Georgia Legislative Requirements using the courses specified on ZOALHCD. If specific courses are not identified for a student, the process applies the course rules defined on ZOALHCF. The process also updates the requirement status and ends or removes any associated hold maintained on ZOAGARP.

Functionality delivered with this release:

Enhancements:

- Updated ZORLHCR so that the process will not end a hold before the hold start date on the Hold Information page (SOAHOLD).
- Updated the processing logic for ZORLHCR to more effectively handle grades .
- Added validation to the Status Code, Term, and Application Code parameters.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Academic Georgia Requirements](#)

Applicant Referral Process (ZORAPRF)

Purpose

The Applicant Referral Process (ZORAPRF) generates a comma delimited.csv file containing demographic and basic admissions data for students who have been denied admissions at the institution. To meet the requirements of 4.2.3.2 Referral of Students to Other Institutions in the Board of Regents Policy Manual, institutions will upload the .csv file to a folder on files.usg.edu. The .csv file will then be made available to other USG institutions to download and access for recruiting purposes.

Functionality delivered with this release:

Enhancements:

- Added the ability for students to opt out of the Applicant Referral process (ZORAPRF) Applicants' responses are stored on the Application Questions and Answers page (SAAQUAN). A new rule has been delivered in the Crosswalk Validation page (GTVSDAX) to control the question used on SAAQUAN. Only students who have a SAAQUAN question answer of "Yes" for the term that they have applied will be pulled by the ZORAPRF process.
- Added a new GTVSDAX rule. The GTVSDAX comments field contains the value that ZORAPRF process will use to determine a student's permission for the applicant referral process. Students must have a SAAQUAN record for the term in which they are applying with an applicant question value matching the GTVSDAX comment for the record below. The comment in GTVSDAX can be changed to adjust the length or wording of the consent statement.
- Added a Consent Collection Date parameter to ZORAPRF. The ZORAPRF process will only pull students who have applied after the Consent Collection Date.

GTVSDAX Field	GTVSDAX Value
Code	DENIED_APP
Sequence	1
Group	DENIED_APPLICANT
External Code	ZORAPRFQUESTION
Description	Applicant Referral Question
Comments	I consent to have my information shared with other colleges and universities.

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[Applicant Referral Process](#)

D2L Extract Process (ZSRD2LC)

Purpose

The ZSRD2LC process is used to extract student and faculty user data, courses, sections, and enrollments to load into the Brightspace Learning Environment created by Desire2Learn (D2L). The ZSRD2LC process produces output in the Integration Pack for Student Information Systems (IPIS) CSV format used by Brightspace.

Functionality delivered with this release:

Enhancements:

- Updated the processing logic for ZSRD2LC to pull program/college code data based on the record with the max Effective Term value as displayed on the Curriculum Rules page (SOACURR).

Testing successful? (circle one) Yes/No

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

Signature

Title

Note: For complete Set-up and Testing Steps for this module, see the following Test Plan:

[D2L Extract Process](#)