

**Degree Works
Major Upgrade
Test Plan**

**Information Technology Services
May 2017**


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Degree Works Generic Upgrade Test Plan

General Testing Instructions

Introduction	<p>This test plan provides multiple baseline best practices related to Degree Works testing after upgrade.</p> <p>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.</p> <p>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.</p> <p>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.</p>
Prerequisites for Functional Testing	<p>Thorough review of all release related documentation, particularly the Release Guide and the Problem Resolution documentation</p> <p>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</p> <p>Working knowledge of Scribe, Transit, Shepentry, Surecode, Shepherd settings, the Student Educational Planner (SEP), and other related baseline application functionality</p>
Prerequisites	<p>Information about prerequisites for testing is provided in the Ellucian Upgrade Guide.</p>
Certification	<p>Degree Works is certified by Ellucian at all supported release levels.</p>
Using a Test Environment	<p>Testing should be conducted in your Degree Works TEST environment.</p>
Collecting Results	<p>Compile your test results for analysis, issue resolution, and for comparison when upgrading your Degree Works production environment.</p>

<p>Generic Test Plan Contents and Illustrations</p> 	<p>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.</p> <p><i>A thorough review of all release related documentation is a prerequisite for use of this generic test plan.</i></p> <p>Illustrations on your screen may not match graphics used in this generic test plan because of localizations and/or customizations to your unique Degree Works TEST environment.</p>
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Testing Web Interface Access


<p>Testing Application Access and Related Functionality</p>	<p>Degree Works is a web-based application. This section will cover access points and other related functionality that should be verified after upgrade.</p>
<p>Steps in Testing</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Verify that you are able to successfully log into the Degree Works web interface using Ellucian Identity Service (EIS), CAS or some other third party application for authentication. <input type="checkbox"/> Verify access using multiple browser types (IE, Chrome, Firefox, Safari) <input type="checkbox"/> Confirm the following, from the Degree Works Introduction Page, Functions selections/menu, after a successful log-in: <ul style="list-style-type: none"> <input type="checkbox"/> Ability to navigate back to your institution portal and/or Banner Self-Service <input type="checkbox"/> Ability to access your institution FAQ page, if applicable <input type="checkbox"/> Ability to access your institution Help page, if applicable <input type="checkbox"/> Ability to access the Print feature, if applicable <input type="checkbox"/> Ability to access Exception Management menu, if applicable <input type="checkbox"/> Ability to access Template Management menu, if applicable <input type="checkbox"/> Ability to access the Change Password feature, if applicable <input type="checkbox"/> Ability to successfully log out

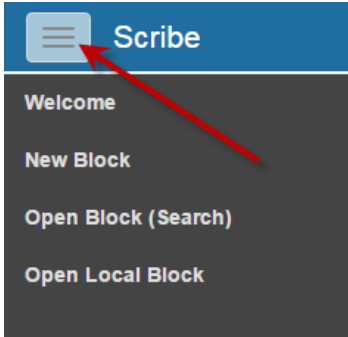
	<ul style="list-style-type: none"> <input type="checkbox"/> After a successful log-in, enter a student ID and verify that you are able to successfully access the following, if enabled in your environment: <ul style="list-style-type: none"> <input type="checkbox"/> Worksheets menu tab <input type="checkbox"/> Classic "Planner" tab <input type="checkbox"/> Plans (new SEP) tab <input type="checkbox"/> Notes tab <input type="checkbox"/> Petitions tab <input type="checkbox"/> Exceptions tab <input type="checkbox"/> GPA Calc tab <input type="checkbox"/> Admin tab <input type="checkbox"/> After initial access verification, confirm that the following user types are able to log in and confirm that configurations/settings are correct (tabs visible, access to Notes, access to Exceptions, audit functionality, etc.) <ul style="list-style-type: none"> <input type="checkbox"/> Students (STU) <input type="checkbox"/> Registrar (REG) <input type="checkbox"/> Advisors with exceptions (ADV) <input type="checkbox"/> Advisors without exceptions (ADVX) <input type="checkbox"/> Additional baseline user classes currently in use (ATHL, CLRK, DEAN, DEPT, etc.) <input type="checkbox"/> Unique user classes created/defined by your institution
Results	
Comments/Errors	
Signature	
Title	

Testing the Connection to the Banner Database

<p>Connecting to the Banner Database</p>	<p>Degree Works data comes directly from the Banner database. After an upgrade, connection verification is required.</p>
<p>Steps in Testing</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Log in to the Banner test environment connected to your Degree Works test environment as someone whose user class has access to the “Refresh this Student’s Data” button <input type="checkbox"/> Select a test student and change any Banner data element that you know will be extracted into Degree Works (grade, major, minor, non-course requirement, test score, etc.) <input type="checkbox"/> Open the Degree Works on the Web test environment and log in with your unique user ID and password <input type="checkbox"/> Enter the same test student ID number used above in the “Student ID” field <input type="checkbox"/> Click on the “Refresh this Student’s Data” button beside the “Last Refresh” field <input type="checkbox"/> Verify that the “Last Refresh” field information updated to the current date and time (i.e., Today at 3:27 pm) <input type="checkbox"/> Click the “Process New” button <input type="checkbox"/> Verify that the “Last Audit” field information updated to the current date <input type="checkbox"/> Verify that the data element change(s) you made in your Banner test environment is reflected on the student’s worksheet (academic audit)
<p>Results</p>	
<p>Comments/Errors</p>	
<p>Signature</p>	
<p>Title</p>	

Testing Access and Functionality - Scribe on the Web

<p>Access and Use of PC Based Scribe</p>	<p>Scribe is the tool used by Degree Works to code degree requirements. Scribe stores requirements in units called blocks, and when a student worksheet is produced, the auditor matches academic history against the requirements built in Scribe blocks.</p> <p><i>Scribe has migrated to the web beginning with Degree Works Version 4.1.5. You must use Scribe on the Web Version 5.0.0.</i></p> <p>Please carefully review release documentation related to Scribe on the Web. Blocks are not automatically synched between the desktop tool and the web-based application.</p>
<p>Steps in Testing</p>	<p><input type="checkbox"/> Open Scribe on the Web (new URL with 4.1.5). You should see the “Welcome to Scribe” landing page.</p>  <p><input type="checkbox"/> Click the New Block button. Verify, using the Editor tab, that you are able to</p> <ul style="list-style-type: none"><input type="checkbox"/> Parse<input type="checkbox"/> Print<input type="checkbox"/> Find/replace text<input type="checkbox"/> Save the block<input type="checkbox"/> Save as a new block<input type="checkbox"/> Save the block as a local file<input type="checkbox"/> Delete the newly created test block

	<ul style="list-style-type: none"><input type="checkbox"/> Navigate back to the Main Menu  <ul style="list-style-type: none"><input type="checkbox"/> Click on Open Block (Search)<input type="checkbox"/> Test a variety of search criteria, using primary tags, block numbers, and/or secondary tags. Note: the “Search for Blocks” button is at the bottom of the screen<input type="checkbox"/> Open an existing block<input type="checkbox"/> View block information using the Details tab. Verify that you are able to<ul style="list-style-type: none"><input type="checkbox"/> Click on Details<input type="checkbox"/> Click on Edit<input type="checkbox"/> Edit Block Details and click OK to save<input type="checkbox"/> Verify that your changes were saved<input type="checkbox"/> Verify that you are able to open, parse, copy/paste to/from blocks, and save a variety of block types, including but not limited to<ul style="list-style-type: none"><input type="checkbox"/> Degree<input type="checkbox"/> Major<input type="checkbox"/> Minor<input type="checkbox"/> Concentration<input type="checkbox"/> Other<input type="checkbox"/> Verify that you can open multiple blocks using multiple browser windows (after searching for block, hover over the block hyperlink, then right-click and select “Open Link in New Tab”)
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Results	
Comments/Errors	
Signature	
Title	

Testing Access to and Use of PC-Based Transit

Access and Use of Transit	Transit is the PC-based graphical user interface that allows users of Degree Works to execute/launch batch reports and processes.
Steps in Testing	<ul style="list-style-type: none"> <input type="checkbox"/> Double click the Transit desk-top icon <input type="checkbox"/> Enter your User ID and Password for the environment you are testing to confirm access <input type="checkbox"/> Navigate the application and execute reports typically run at your institution. Review the log to determine if the report executed correctly. Examples include, but are not limited to <ul style="list-style-type: none"> <input type="checkbox"/> ADMIN tasks <ul style="list-style-type: none"> <input type="checkbox"/> dap22dbg (single student criteria only for testing purposes) <input type="checkbox"/> daprestart <input type="checkbox"/> rad30dbg (single student criteria only for testing purposes) <input type="checkbox"/> ucx12job <input type="checkbox"/> webanalyze <input type="checkbox"/> webrestart <input type="checkbox"/> weblogon (single student criteria only for testing purposes) <input type="checkbox"/> UCX01 – List UCX Records Modified <input type="checkbox"/> AUD01 – List unhooked and unenforced exceptions <input type="checkbox"/> DAP16 – Parse Requirements Processor <input type="checkbox"/> DAP22 – Batch Audits <input type="checkbox"/> RAD30 – Banner Extract and Bridge (single student criteria only for testing purposes) <input type="checkbox"/> SCR02 – Find blocks where this COURSE is referenced

	<input type="checkbox"/> SCR05 – List blocks changed by date range <input type="checkbox"/> SCR08 – List LOG entries from Scribe text <input type="checkbox"/> SCR09 – List TODO entries from Scribe text <input type="checkbox"/> SCR10 – Find blocks where this TEXT is referenced
Results	
Comments/Errors	
Signature	
Title	

Testing Surecode (via Degree Works administrative shell - dwShell)

Surecode (via Degree Works administrative shell – dwShell)	Surecode allows users of Degree Works to codify, store, maintain, and validate data values. These values or codes are stored in discrete units called Tables within an overall structure called the Universal Code eXtension (UCX).
Steps in Testing	<input type="checkbox"/> Log into your dwShell test environment <input type="checkbox"/> Click on the Surecode tab <input type="checkbox"/> Verify that the left panel appears with the collection of Surecode tools that can be used for maintenance (UCX Navigator, Recently Viewed, Favorites, etc.) <input type="checkbox"/> Verify that the main window initially displays a list of all UCX tables available for editing <input type="checkbox"/> Using the UCX Navigator tab, verify that grouped table folders appear (Audits, Configurations, Scribe, Student Data, System, etc.) <input type="checkbox"/> Select any table from any of the grouped table folders (double-click or high-light then click the “go” arrow in the main window) and verify the table data displays in the main window <input type="checkbox"/> After the selected table displays in the main window, double-click on the key to view entry information

	<ul style="list-style-type: none"> <input type="checkbox"/> Verify that you can edit and save information for the selected key in the selected table (reminder: use the single “save current form change only” icon for one key update) <input type="checkbox"/> Select a different table, one with multiple keys, and double click to display in the main window <input type="checkbox"/> Verify that you can edit and save changes/updates using the Grid Panel (reminder: use the multiple “save all grid changes” icon for more than one key update) <input type="checkbox"/> Select a new, different table, and double click to display in the main window <input type="checkbox"/> Verify that you can add a new key entry and save <input type="checkbox"/> Verify that you can delete the newly added key entry and save <input type="checkbox"/> Verify that you can copy an existing record using the Copy button in the navigation panel <input type="checkbox"/> Verify that you can save the record you just copied <input type="checkbox"/> Verify that you can successfully use Bulk Operations to transfer table data to a file on your PC <input type="checkbox"/> Verify that you can successfully use Bulk Operations to upload table data stored in a file on your PC <input type="checkbox"/> Review BAN080 – compare data to your BAN080 data in production
Results	
Comments/Errors	
Signature	
Title	

Testing/Confirming Localizations and Other Customizations

<p>Localizations and Customizations</p>	<p>Because the shpscripts and properties files are now stored in the database, a new application tool (Composer) has been introduced with Degree Works 5.0 to help you manage your localizations to these resources. This means that these resources no longer require file directory access to be maintained. Shepherd Scripts are stored in the shp_composer_mst. A baseline version of these Shepherd Scripts is</p>
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	<p>delivered by Ellucian at installation or in an update, and is not modifiable. When a Shepherd Script is localized, these changes are stored in a different field on the shp_composer_mst so the baseline version is always available for comparison and troubleshooting. A localized Shepherd Script needs to be enabled before it will be used by the Degree Works web interface. The Degree Works application is typically localized, customized, and modified based on institutional branding, business practices and preferences. The items listed below are suggested test/touch points related to verifying localizations/customizations/modifications were properly applied after upgrade, and that the “look and feel” of your environment is correct.</p>
<p>Steps in Testing</p>	<ul style="list-style-type: none"><input type="checkbox"/> With Composer Navigation, examples of items you might verify, include but are not limited to:<ul style="list-style-type: none"><input type="checkbox"/> Make sure you can access the Composer navigation menu, online help and notification center.<input type="checkbox"/> Click on the Navigation Menu and ensure you can navigate to the other pages: Home, Resources and Scripts.<input type="checkbox"/> Access online Help from the Persona dropdown on the right of the navigation bar.<input type="checkbox"/> Try logging out and then logging back in. Select Sign out from the Persona dropdown button on the right of the navigation bar.<input type="checkbox"/> The Notification Center displays success or failure messages. Try saving a script or resource and ensure it displays a success or failure message.<input type="checkbox"/> Using the Composer Editor, put the cursor in the editor window and issue the Find (Ctrl-F) or Replace (Ctrl-H) shortcut. Note: because a Baseline record is not editable, the Replace toolbar will not open in this editor and only works in the Localized editor.

	<ul style="list-style-type: none"><input type="checkbox"/> Using the Navigation Menu, select Scripts menu, a list of available Shepherd Scripts will display. Select a script and open it in the Editor page.<input type="checkbox"/> With Localizing Scripts, examples of items you might verify, include but are not limited to:<ul style="list-style-type: none"><input type="checkbox"/> Create a localized script by copying an existing baseline script into the localized editor by clicking the Copy button and make your modifications.<input type="checkbox"/> Enable a localized script by changing the Shepherd setting <code>localization.generatedPages.enable</code> setting to true. Note: The localized script will not be enabled until you switch the Localization toggle from Disabled to Enabled.<input type="checkbox"/> After making changes to a localized Shepherd Script, click on the Save button. Ensure the save is successful (a confirmation message will be displayed in the Notification Center).<input type="checkbox"/> Delete a localized Shepherd Script, switch the Localization toggle to Disabled, select all the test in the Localized editor and delete it, then Save your changes.<input type="checkbox"/> Verify that your custom script is in <code>/local/shpscripts</code><input type="checkbox"/> Add a Custom Shepherd Script using SQL to add a <code>shp_composer_mst</code> record<input type="checkbox"/> Run the <code>shpscriptsupdatelocal</code> script to update the custom <code>shp_composer_mst</code> with the source<input type="checkbox"/> Verify that your custom script appears in the list of Shepherd Scripts in the Composer.
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	<ul style="list-style-type: none"><input type="checkbox"/> With Resources, examples of items you might verify, include but are not limited to:<ul style="list-style-type: none"><input type="checkbox"/> Select Resources from the navigation menu, ensure you can view the list of available properties files.<input type="checkbox"/> Edit a resource, click on the Editor tab and view resource information (Modified data, Localization Created data) click on the Details tab.<p>Note: the baseline version will load in the Baseline Resource editor, while the localized resource for the default locale will load in the Localized Resource editor, if it exists. The user can select a different locale from the Locale dropdown under the Localized Resource editor to either load that properties file or create it.</p><input type="checkbox"/> Create a localized version of a resource, copy the existing baseline properties file by clicking the Copy button.<input type="checkbox"/> Enable a Localized Resource in localization.internationalization.enable set to true. Review the Shepherd setting to ensure it is configured correctly.<p>Note: A localized resource will not be used by Degree Works unless it has been enabled. To enable a localized resource, click on the Localization toggle so it switches from Disabled to Enabled. Note that changing the Localization toggle triggers an auto save of the script.</p><input type="checkbox"/> Save a localized resource by clicking the Save button or switching the Localization toggle. Verify the save was successful via the Notification Center.<input type="checkbox"/> Delete a localized resource, switch the Localization toggle to Disabled, select all text and delete it, then Save your changes. <ul style="list-style-type: none"><input type="checkbox"/> With Resources, examples of items you might verify, include but are not limited to:
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	<ul style="list-style-type: none"><input type="checkbox"/> Modify or create a customized .properties file, select the appropriate resource from the Resource List, open it in the Editor and choose the desired locale. Cut and paste the properties you want to localize from the Baseline Editor into the Localized Editor. You can copy the entire baseline properties file into the localized properties file, but it's not recommended unless you are planning to localize ALL of the properties.<input type="checkbox"/> Modify the TEXT part of the entry. Note: Do not modify the KEY, this is a reference used by the application, and if modified, the message will not be displayed.<input type="checkbox"/> Select the Default locale, add the properties you wish to localize, save and enable this record. <input type="checkbox"/> Compare localizations in the upgraded environment (test) to localizations in the non-upgraded environment (production) and make note of differences/issues.<input type="checkbox"/> Carefully review the "Student Context Area" to ensure all configured fields display, as well as any customized fields.<input type="checkbox"/> If you have a spreadsheet or other documentation related to your localizations, review and ensure all items appear correctly in your newly upgraded test environment.<input type="checkbox"/> Examples of items you might verify include but are not limited to<ul style="list-style-type: none"><input type="checkbox"/> Branding and logos<input type="checkbox"/> Color schemes<input type="checkbox"/> Welcome text and photograph<input type="checkbox"/> Menu bars (Back to Self Service, FAQs, Help, etc.)<input type="checkbox"/> Find Student box localizations/customizations<input type="checkbox"/> Progress bar display<input type="checkbox"/> Disclaimer verbiage
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	<input type="checkbox"/> Legend location and localization <input type="checkbox"/> Localization to block display names/audit sections (example: “Fall-Through” could be renamed to “General Electives” or “Insufficient” could be renamed to “Insufficient Course Work”) <input type="checkbox"/> CourseLink localizations/modifications <input type="checkbox"/> Other localizations, customizations and/or modifications unique to your institution
Results	
Comments/Errors	
Signature	
Title	

Testing Worksheet Views and Reports

Worksheet Views and Reports	<p>Degree Works provides a variety of different types of audit reports, each displaying information about students and their associated degree progress.</p> <p>Most institutions have localizations/customized audit worksheets and/or reports based on institutional preference and local business practices. Please keep that in mind as you work through this section. Additionally, your institution may have disabled or removed one or more audit reports from the drop-down menu.</p> <p>Please test using a variety of browsers (IE, Chrome, Firefox, and Safari).</p>
Steps in Testing	<input type="checkbox"/> Confirm, based on your unique Degree Works environment, that you have access to the following frequently used worksheets/reports. Execute steps outlined for each section below, if applicable to your environment. <ul style="list-style-type: none"> <input type="checkbox"/> Registrar Report <ul style="list-style-type: none"> <input type="checkbox"/> Verify access if enabled (click View button) <input type="checkbox"/> Verify that hyperlinks work from section to section <input type="checkbox"/> Save as PDF if enabled <input type="checkbox"/> Process new if enabled

	<ul style="list-style-type: none"><input type="checkbox"/> Check/uncheck in-progress classes and process new if enabled, and verify new report<input type="checkbox"/> Check/uncheck preregistered classes and process new if enabled, and verify new report<input type="checkbox"/> Student View Worksheet Report<ul style="list-style-type: none"><input type="checkbox"/> Verify access if enabled (click View button). <i>Note: The Student View Worksheet is loaded by default when you access the application and select a student ID.</i><input type="checkbox"/> Refresh student data from Banner if enabled<input type="checkbox"/> Save as PDF if enabled<input type="checkbox"/> Process new audit if enabled<input type="checkbox"/> View “Class History” (<i>Note: selection to view class history is available on each worksheet screen but has only been included, for testing, in the Student View Worksheet section</i>)<input type="checkbox"/> Verify that CourseLink functions as expected (hyperlink associated with “Still Needed” coursework on audit)<input type="checkbox"/> Check/uncheck in-progress classes and process new if enabled, and verify new audit<input type="checkbox"/> Check/uncheck preregistered classes and process new if enabled, and verify new audit<input type="checkbox"/> Scroll to the Exceptions section on the worksheet and click the Description hyperlink – verify relocation to correct area on audit using the hyperlink. <i>Note: if test student does not have exceptions section will not appear.</i><input type="checkbox"/> Freeze and save an audit (you will verify access to a frozen audit in a later section of this test plan)<input type="checkbox"/> Graduation Checklist<ul style="list-style-type: none"><input type="checkbox"/> Verify access if enabled (click View button)<input type="checkbox"/> Verify that hyperlinks work from section to section<input type="checkbox"/> Save as PDF if enabled<input type="checkbox"/> Process new if enabled<input type="checkbox"/> Check/uncheck in-progress classes and process new if enabled, and verify new checklist<input type="checkbox"/> Check/uncheck preregistered classes and process new if enabled, and verify new checklist
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Registration Checklist

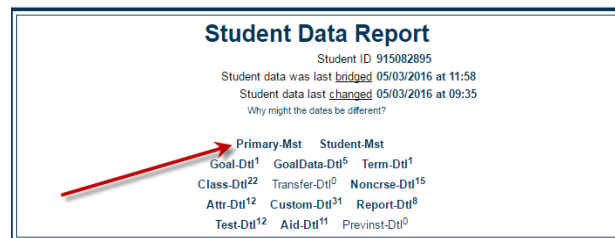
- Verify access if enabled (click View button)
- Verify that hyperlinks work where appropriate
- Verify that CourseLink functions as expected (hyperlink associated with “Still Needed” coursework on audit)
- Save as PDF if enabled
- Process new if enabled
- Check/uncheck in-progress classes and process new if enabled, and verify new checklist
- Check/uncheck preregistered classes and process new if enabled, and verify new checklist

Diagnostics Report

- Verify access if enabled
- Review version information in the top block to confirm upgrade information
- Test hyperlinks from section to section
- Process new if enabled
- Check/uncheck in-progress classes and process new if enabled, and verify new report
- Check/uncheck preregistered classes and process new if enabled, and verify new report

Student Data Report

- Verify access if enabled
- Test hyperlinks shown in the Student Data Report header area (i.e., Primary-Mst, Attr-Dtl, Report-Dtl, etc.)



- Process new if enabled
- Check/uncheck in-progress classes and process new if enabled, and verify new report

Results	
Comments/Errors	
Signature	
Title	

Testing the History Option (Historic Degree Audit)

History Option (Historic Degree Audit)	The History Option allows you to view historical academic audits for a student. Degree Works can be set to save anywhere from 1-99 audits per student.
Steps in Testing	<input type="checkbox"/> Enter a student ID in the Student ID field <input type="checkbox"/> Click the Worksheets tab <input type="checkbox"/> Click the History option to bring up the History – Introduction Page <input type="checkbox"/> Make sure the format selected is “Student View” first <input type="checkbox"/> Select a previously frozen audit and click View <input type="checkbox"/> Click the Save as PDF button to confirm, if enabled in your environment <input type="checkbox"/> Delete a previously frozen audit if enabled
Results	
Comments/Errors	
Signature	
Title	

Testing What-If Audit Functionality

What-If Audit Functionality	<p>What-If audits allow students (and advisors) to process a speculative degree audit for their current academic history. What-If audits can be run against requirements for a different degree, major, minor, catalog year, or any other item available on the What-If audit page.</p> <p>Please keep in mind that it is important to make valid selection combinations when testing What-If functionality.</p> <p><i>Note: The What-If page can operate in a different mode based on curriculum rules stored in Banner. When this option is enabled, the</i></p>
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	<i>picklists available are driven by program or from the school, degree, college combination. The primary major, minor, and concentration are then driven by the primary school, degree, and college selected.</i>
Steps in Testing	<input type="checkbox"/> Enter a student ID in the Student ID field <input type="checkbox"/> Click the Worksheets tab <input type="checkbox"/> Click the What-If option <input type="checkbox"/> Make valid selections from the selection criteria items available in your unique environment <input type="checkbox"/> Click Process What-If to verify functionality works <input type="checkbox"/> Click Save As PDF, if enabled in your environment <input type="checkbox"/> Click the What-If History option, if enabled in your environment <input type="checkbox"/> Access the Historic Report drop down and view historic what-if reports, if enabled in your environment <input type="checkbox"/> Delete one of the historic what-if audits, if enabled in your environment
Results	
Comments/Errors	
Signature	
Title	

Testing Look Ahead Functionality

Look Ahead Functionality	Look Ahead is an ad hoc tool that can be used to assist students with registration planning.
Steps in Testing	<input type="checkbox"/> Enter a student ID in the Student ID field <input type="checkbox"/> Click on the Worksheets tab <input type="checkbox"/> Click on the Look Ahead option <input type="checkbox"/> Enter a variety of projected courses in the list <input type="checkbox"/> Click Remove Course to verify functionality <input type="checkbox"/> Click Process New

	<input type="checkbox"/> Verify that the Look Ahead courses entered appear on the Look Ahead audit as PLAN/PLANNED
Results	
Comments/Errors	
Signature	
Title	

Testing Notes Functionality

Notes Functionality	The Notes option allows Degree Works users to document information on student records (advising notes, graduation check notes, etc.). Notes can be marked internal, but most notes are public and appear to all users. Notes appear in the Notes section of the academic audit.
Steps in Testing	<ul style="list-style-type: none"> <input type="checkbox"/> Enter a student ID in the Student ID field <input type="checkbox"/> Click on the Notes tab <input type="checkbox"/> If notes already exist on the student’s audit, they will appear under the “View Notes” option. If no notes exist, revisit this option after adding a Note. <input type="checkbox"/> Click on Add Note <input type="checkbox"/> Select a predefined note to add or enter ad hoc text, if allowed in your environment <input type="checkbox"/> Click Save Note. You should receive the “Your note was added successfully” message <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> After the audit appears, scroll down to the Notes section and verify the note added appears <input type="checkbox"/> Click on Modify Notes <input type="checkbox"/> If allowed in your environment, edit the note previously added and click the Note icon to save <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> After the audit appears, scroll down to the Notes section and verify that the modified note appears

	<ul style="list-style-type: none"> <input type="checkbox"/> Click Add Note again <input type="checkbox"/> Select a predefined note to add or enter ad hoc text, if allowed in your environment <input type="checkbox"/> If the “Not available to student” box appears, check it <input type="checkbox"/> Click Save Note <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> After the audit appears, scroll down to the Notes section and verify that the note was added and that the “check mark” is in place under the Internal column <input type="checkbox"/> Click Delete Notes <input type="checkbox"/> Click the Note icon for any note to delete <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> After the audit appears, scroll down to the Notes section and verify that the selected note has been deleted
Results	
Comments/Errors	
Signature	
Title	

Testing Exceptions

Exceptions	<p>The Exceptions function allows users with appropriate permission to modify the requirements for degree completion for a specific student.</p> <p><i>Note: Testing for this section depends entirely on your unique institutional business practices related to using exceptions in Degree Works.</i></p>
Steps in Testing	<ul style="list-style-type: none"> <input type="checkbox"/> Enter a student ID in the Student ID field <input type="checkbox"/> Click on the Exceptions tab <input type="checkbox"/> Verify that all the Exception Types you typically have access to are available in the drop down box <input type="checkbox"/> Choose Force Complete and click Load

	<ul style="list-style-type: none"><input type="checkbox"/> Enter a description<input type="checkbox"/> Choose the rule and/or qualifier you wish to apply the Force Complete exception to<input type="checkbox"/> Click Add Exception then click OK<input type="checkbox"/> Click Run New Audit<input type="checkbox"/> Click on the Worksheets tab<input type="checkbox"/> Verify that the Force Complete exception appears on the audit and in the exceptions section<input type="checkbox"/> Click the Exceptions tab again<input type="checkbox"/> Choose the Substitute exception and click Load<input type="checkbox"/> Enter the replacement criteria and substitution criteria, then select the appropriate radio button for the substitution<input type="checkbox"/> Click Add Exception then click OK<input type="checkbox"/> Click Run New Audit<input type="checkbox"/> Click on the Worksheets tab<input type="checkbox"/> Verify that the Substitute exception appears on the audit and in the exceptions section<input type="checkbox"/> Click the Exceptions tab again<input type="checkbox"/> Choose the Also Allow exception and click Load<input type="checkbox"/> Enter the Also Allow criteria, then select the appropriate radio button for the requirement update<input type="checkbox"/> Click Add Exception then click OK<input type="checkbox"/> Click Run New Audit<input type="checkbox"/> Click on the Worksheets tab<input type="checkbox"/> Verify that the Also Allow exception appears on the audit and in the exceptions section<input type="checkbox"/> Click the Exceptions tab again<input type="checkbox"/> Choose the Apply Here exception and click Load<input type="checkbox"/> Enter the Apply Here criteria, then select the appropriate radio button for the requirement update
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	<ul style="list-style-type: none"> <input type="checkbox"/> Click Add Exception then click OK <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> Click on the Worksheets tab <input type="checkbox"/> Verify that the Apply Here exception appears on the audit and in the exceptions section <input type="checkbox"/> Click the Exceptions tab again <input type="checkbox"/> Choose the Remove Course and/or Change the Limit exception and click Load <input type="checkbox"/> Enter the Remove Course and/or Change the Limit criteria, then select the appropriate radio button for the requirement update <input type="checkbox"/> Click Add Exception then click OK <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> Click on the Worksheets tab <input type="checkbox"/> Verify that the Remove Course and/or Change the Limit exception appears on the audit and in the exceptions section <input type="checkbox"/> Click the Exceptions tab again <input type="checkbox"/> Scroll to the bottom of the screen, to the Exceptions section <input type="checkbox"/> Click the radio button for one of the test exceptions previously created <input type="checkbox"/> Click Remove Exception then click OK <input type="checkbox"/> Click Run New Audit <input type="checkbox"/> Click on the Worksheets tab <input type="checkbox"/> Verify that the exception selected for removal is no longer on the audit and/or in the exceptions section
Results	
Comments/Errors	
Signature	
Title	

Testing the GPA Calculators

GPA Calculators	There are three different GPA calculators: Graduation, Term, and Advice Calculators. The calculators, in conjunction with current Degree Works functions, can help students in many ways. Students can set realistic goals at the beginning of the term or academic career, perform precise calculations of their end-of-term GPA using actual academic information, and perform accurate mapping for achieving honors, avoiding probation, or satisfying personal academic goals.
Steps in Testing	<input type="checkbox"/> Click on the GPA Calc tab <input type="checkbox"/> Select the Graduation Calculator, enter the required criteria, and press Calculate <input type="checkbox"/> Verify that the Graduation Calculator provided accurate calculations and advice based on the criteria entered <input type="checkbox"/> Select the Term Calculator, enter the required criteria, and press Calculate <input type="checkbox"/> Verify that the Term Calculator provided accurate calculations and advice based on the criteria entered <input type="checkbox"/> Select the Advice Calculator, enter the required criteria, and press Calculate <input type="checkbox"/> Verify that the Advice Calculator provided accurate calculations and advice based on the criteria entered
Results	
Comments/Errors	
Signature	
Title	

Testing the old Classic Student Educational Planner

Old Classic Student Educational Planner	The older, classic Student Educational Planner (SEP) is a tool in Degree Works that students and advisors can use to create academic plans. Pre-defined plans, or templates for particular programs of study, can be created ahead of time and loaded for student advising. Once a plan is populated it may be modified as needed. The older, classic SEP format
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	allows courses from the degree audit to be pulled into the plan with a simple drag and drop action.
Steps in Testing	<ul style="list-style-type: none"><input type="checkbox"/> Select a Student ID and click on the Planner tab<input type="checkbox"/> Verify access to the Plan list<input type="checkbox"/> Verify the option for Add New Plan displays<input type="checkbox"/> Verify that active and inactive plans appear if records exist for the student ID selected<input type="checkbox"/> Verify access to Notes mode, Calendar mode, and Planned vs. Taken<input type="checkbox"/> Verify whether Show Completed Classes radio button performs as expected<input type="checkbox"/> Verify access to Edit a plan<input type="checkbox"/> Verify access to View a plan<input type="checkbox"/> Verify that a pre-defined plan can be loaded<input type="checkbox"/> Verify that courses can be dragged/dropped from the planner worksheet into the plan<input type="checkbox"/> Verify that you can approve a plan if CFG020 PLANNER Plans Need Approval Flag is in use<input type="checkbox"/> Verify that you can reject a plan if CFG020 PLANNER Plans Need Approval Flag is in use<input type="checkbox"/> Verify that you can send an email using the Student email hyperlink (if enabled)<input type="checkbox"/> Verify that you can send an email using the Advisor email hyperlink (if enabled)<input type="checkbox"/> Verify that you can create a new plan<input type="checkbox"/> Verify that you can create a new plan from a template<input type="checkbox"/> Verify access to and the ability to execute a "What-If" audit via the "Use What If Scenario" radio button<input type="checkbox"/> Verify the ability to make a plan active/inactive<input type="checkbox"/> Verify the ability to add courses to a plan<input type="checkbox"/> Verify that course validation is working (enter a fictitious course)

	<ul style="list-style-type: none"> <input type="checkbox"/> Verify the ability to create a Scribe block (if enabled) <input type="checkbox"/> Verify the ability to add placeholders to a plan <input type="checkbox"/> Verify the ability to add/modify notes to a plan <input type="checkbox"/> Verify the ability to drag/drop courses from the audit to the plan <input type="checkbox"/> Verify the ability to delete items from the plan (terms, notes, courses, etc.) <input type="checkbox"/> Verify the ability to change terms on a plan <input type="checkbox"/> Verify the ability to edit/save an existing template <input type="checkbox"/> Verify the ability to create/save a new template <input type="checkbox"/> Verify the ability to add courses to a template <input type="checkbox"/> Verify the ability to add placeholders to a template <input type="checkbox"/> Verify the ability to add/modify/delete notes on a template <input type="checkbox"/> Verify the ability to change/modify terms on a template
Results	
Comments/Errors	
Signature	
Title	

Testing the new Student Educational Planner (SEP)

<p>New Student Educational Planner (SEP)</p>	<p>The new generation Student Educational Planner (SEP) is a robust, easy-to-use academic advising tool that allows students and advisors to create a plan for academic success. The SEP clearly defines academic expectations for students and is easily customized. The Template Management module allows institutions to create programs of study that can be applied to students individually or in batch. Requirements can be tracked providing feedback to students and identifying students who are off-track.</p>
<p>Steps in Testing</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Verify access to the Template Management module <input type="checkbox"/> Verify the ability to select a template from the list <input type="checkbox"/> Verify the ability to search for a template using the open search box

	<ul style="list-style-type: none"><input type="checkbox"/> Verify the ability to utilize Advanced Search functionality<input type="checkbox"/> Verify the ability to load the selected template<input type="checkbox"/> Verify the ability to edit the selected template (add/modify/delete requirements)<input type="checkbox"/> Verify the ability to save the selected template<input type="checkbox"/> Verify the ability to create/save a new template<input type="checkbox"/> Verify the ability to add course requirements to a template<input type="checkbox"/> Verify the ability to add a choice requirement to a template<input type="checkbox"/> Verify the ability to add a test score to a template<input type="checkbox"/> Verify the ability to add a GPA requirement to a template<input type="checkbox"/> Verify the ability to add a non-course requirement to a template<input type="checkbox"/> Verify the ability to add a placeholder to a template<input type="checkbox"/> Verify the ability to drag/drop courses from the course list onto a template<input type="checkbox"/> Verify the ability to delete requirements from a template<input type="checkbox"/> Verify the ability to make the template active<input type="checkbox"/> Verify the ability to make the template inactive<input type="checkbox"/> Verify the ability to add a variety of notes to the template, using “copy to plan” and marking as “internal” as needed for testing, as well as allowing some notes to be viewable (copy to plan, not internal)<ul style="list-style-type: none"><input type="checkbox"/> Internal note for a term<input type="checkbox"/> Internal note for a course<input type="checkbox"/> Internal note for the template<input type="checkbox"/> Note for a term, copy to plan<input type="checkbox"/> Note for a course, copy to plan<input type="checkbox"/> Note for a plan, copy to plan<input type="checkbox"/> Verify that CourseLink performs as expected within the Template Management module<input type="checkbox"/> From the classic Degree Works application, select a student who has several Plans<input type="checkbox"/> Verify the ability to view and select a plan from the plan list
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	<ul style="list-style-type: none"><input type="checkbox"/> Verify the ability to modify/delete/save requirements, terms, notes, etc., from the student plan<ul style="list-style-type: none"><input type="checkbox"/> Add a choice requirement<input type="checkbox"/> Add a placeholder requirement<input type="checkbox"/> Add a test score requirement<input type="checkbox"/> Add a course requirement<input type="checkbox"/> Add a non-course requirement<input type="checkbox"/> Add a GPA requirement<input type="checkbox"/> Delete requirements<input type="checkbox"/> Insert a term<input type="checkbox"/> Delete a term<input type="checkbox"/> Reassign terms<input type="checkbox"/> Add notes<ul style="list-style-type: none"><input type="checkbox"/> Per term, internal<input type="checkbox"/> Per course, internal<input type="checkbox"/> Per plan, internal<input type="checkbox"/> Per term, viewable<input type="checkbox"/> Per course, viewable<input type="checkbox"/> Per plan, viewable<input type="checkbox"/> Add a predefined note<input type="checkbox"/> Delete a predefined note<input type="checkbox"/> Delete a variety of notes<input type="checkbox"/> Verify the ability to drag/drop courses onto the plan from the Still Needed list<input type="checkbox"/> Verify the ability to refresh the Still Needed list<input type="checkbox"/> Verify the ability to drag/drop courses onto the plan from the Courses list<input type="checkbox"/> Verify the ability to save the student plan after modification<input type="checkbox"/> Verify the ability to “save as” and create a new plan from an existing plan<input type="checkbox"/> Verify the ability to perform a What-If audit from within the plan using a variety of scenarios<input type="checkbox"/> Verify the ability to make the student plan active/inactive, locked/not locked<input type="checkbox"/> Verify the ability to create a new student plan<input type="checkbox"/> Verify that Tracking functions correctly (based on SEP set-up/configurations at your institution)
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	<ul style="list-style-type: none"> <input type="checkbox"/> Verify that localizations appear when selecting Audit (bottom menu bar) from the Calendar, Edit, or Notes view <input type="checkbox"/> Verify that planned courses appear when selecting the Audit view (top list of variables box) or Audit from the Calendar, Edit, or Notes view <input type="checkbox"/> Verify that the Create Block functionality works (if enabled) <input type="checkbox"/> Verify access to the SEP and enabled functionality for all user classes (STU, ADV, ADVX, REG, etc.). Note: access to functionality depends on your unique institutional choices related to SEP set-up. <input type="checkbox"/> If localizations have been made to the SEP, verify they appear as expected <input type="checkbox"/> Test a variety of scenarios based on your unique institutional business practices and programs of study. Examples might include <ul style="list-style-type: none"> <input type="checkbox"/> Double majors/minors/concentrations <input type="checkbox"/> Dual degrees <input type="checkbox"/> Same course listed twice on plan <input type="checkbox"/> Test scores <input type="checkbox"/> Choice requirement scenarios <input type="checkbox"/> Choice requirements with Pointers <input type="checkbox"/> GPAs
Results	
Comments/Errors	
Signature	
Title	

Other Items for Consideration and Testing

Other Items for Consideration and Testing	Thinking about your unique Degree Works environment and your institutional business practices, review the following items and test if applicable.
Steps in Testing	<ul style="list-style-type: none"> <input type="checkbox"/> Transfer credit on student audits <input type="checkbox"/> Graduate student audits <input type="checkbox"/> Dual majors and/or degrees

	<input type="checkbox"/> Multiple minors and/or majors <input type="checkbox"/> Minimum grade requirements <input type="checkbox"/> Insufficient grades <input type="checkbox"/> Incomplete grades <input type="checkbox"/> Advanced Placement credit/IB credit and grades <input type="checkbox"/> Overall GPA calculations <input type="checkbox"/> Major GPA calculations <input type="checkbox"/> Overall hours calculations <input type="checkbox"/> Repeatable courses (i.e., music classes, seminars) <input type="checkbox"/> Repeated courses <input type="checkbox"/> Cross-listed courses <input type="checkbox"/> Student attributes <input type="checkbox"/> Course attributes <input type="checkbox"/> Sharing <input type="checkbox"/> Hidden requirements in Scribe blocks (old courses, changed disciplines, etc.) <input type="checkbox"/> Other unique Scribe scenarios used at your institution
Results	
Comments/Errors	
Signature	
Title	

Testing Pending Defect Correction and Known Issues

<p>Campus Pending Defect Correction and Known Issues</p>	<p>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.</p>
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	<i>Note: Comparison of pending defects and/or known issues to the Ellucian Problem Resolutions document for your Degree Works release level is recommended.</i>
Pending Defect Correction and/or Known Issues	
Results	
Comments/Errors	
Signature	
Title	