Degree Works Upgrades
Planning for Smooth Transitions
December 27, 2018
Where are you now?

I DON'T KNOW throws it back to TOMORROW.

I throw the ball to WHO.

WHAT throws it to I DON'T KNOW.

Whoever it is drops the ball and the guy runs to second. WHO picks up the ball and throws it to WHAT.

TRIPLE PLAY!
Planning
- Research release
- Review current environment

TEST Upgrade
- Confirm settings
- Localizations

Testing
- Compile population
- Use Test Plan
- Document issues

Issue Resolution
- Reference documentation
- Work with Ellucian
- Retest

PROD Upgrade
- Migrate TEST updates
- Confirm settings

Final Testing
- New test population
- Use test plan
- Document issues
Planning

- Research release
- Review current environment
Degree Works Dashboard
Now on the web!
DWShell – Shepentry

Shepentry Overview

Users
Description: Add, edit, update user data

Passports
Description: View active Passports

Groups
Description: Add, edit, update groups

Logs
Description: View logs
DWSHelm – Surecode

Select a UCX Table to Edit

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AU012</td>
<td>User Class Codes</td>
</tr>
<tr>
<td>AU013</td>
<td>User Class Permissions</td>
</tr>
<tr>
<td>AU014</td>
<td>Exception Type Codes</td>
</tr>
<tr>
<td>AU015</td>
<td>Exception Status Codes</td>
</tr>
<tr>
<td>AU027</td>
<td>Major What-If Picklist</td>
</tr>
<tr>
<td>AU029</td>
<td>Minor What-If Picklist</td>
</tr>
<tr>
<td>AU031</td>
<td>Athletic Eligibility types</td>
</tr>
<tr>
<td>AU032</td>
<td>Audit Freeze Types</td>
</tr>
<tr>
<td>AU033</td>
<td>Financial Aid Award types</td>
</tr>
<tr>
<td>AU034</td>
<td>Audit Type</td>
</tr>
<tr>
<td>AU047</td>
<td>Repeat Policies</td>
</tr>
<tr>
<td>BAN001</td>
<td>Banner Lab Schedule Codes to be Skipped</td>
</tr>
<tr>
<td>BAN002</td>
<td>Banner Lab Section Codes to be Skipped</td>
</tr>
<tr>
<td>BAN003</td>
<td>Banner Grade Types to be Skipped</td>
</tr>
<tr>
<td>BAN080</td>
<td>Dynamic SQL Definitions</td>
</tr>
<tr>
<td>CFG020</td>
<td>Configuration - BANNER</td>
</tr>
<tr>
<td>CFG020</td>
<td>Configuration - COURSELINK</td>
</tr>
<tr>
<td>CFG020</td>
<td>Configuration - BLCOPRO</td>
</tr>
</tbody>
</table>
What admin command do you want to run? *

Enter a student/user ID (required for dap22dbg/rad30dbg/weblogon)
Do You Need an Upgrade?

- Unsupported versions
- Major issues resolved in new release
- Research – talk to other institutions, check eCommunities
Timing an Upgrade

• Check your academic calendar
• Check availability of resources and other team members
• Ellucian releases may mean you are on an unsupported version.
Gathering Knowledge

• Download new version documentation from Ellucian
• Look for major impacts on functional features and end-user features
• Search Master Articles in the Ellucian Hub for Known Issues
• Talk to other institution’s about their experiences
• Communication with technical staff – concerns about compatibility or other technical aspects
Communication

• Who’s on your team? (SuperUSER, DBA’s, Registrars Office)
• Define roles and responsibilities
• Schedule Status Updates
• Create your test plan
• Cloning your current PROD environment
• Creating copies of your extracts
TEST Upgrade

- Confirm settings
- Localizations

Testing

- Compile population
- Use Test Plan
- Document issues
Test Plan

- Should match your institution’s business practices
- Source your testers
- Pull a sample population - Majors, levels, degrees, minors, concentrations, athletes
- Test in multiple browsers
- Aggregate your data
Access and Permissions

- Who is your SuperUSER?
- Extract population
- Check permissions for each User Class
  - Add and remove keys as needed
  - Review SHPCFG and Shepentry
Extracts

- How information is bridged to Degree Works
- Obtain your current extracts from the DBAs
- Defined by you
- Review with functional and technical staff:
  - Who needs access?
  - What kind of access is needed?
  - Who needs an audit?
- Examples from other institutions
• SuperUSER needs to check settings and make adjustments as needed.
• Repeat policies, insufficient course policies, grade types
• PC tools vs. Scribe on the Web
• Surecode
Localizations

- Review quickly as resources may be limited
- Reevaluate what you have, especially the student header
- Updates for pictures and logos

<table>
<thead>
<tr>
<th><strong>Student View</strong></th>
<th>AA27M0QP as of 10/06/2016 at 13:26</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student</strong></td>
<td>Jensen, Jamie J</td>
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<tr>
<td><strong>ID</strong></td>
<td>900014988</td>
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<tr>
<td><strong>Classification</strong></td>
<td>Sophomore</td>
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<td><strong>Advisor</strong></td>
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<tr>
<td><strong>Overall GPA</strong></td>
<td>3.826</td>
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<tr>
<td><strong>Level</strong></td>
<td>Undergraduate Semester System</td>
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<tr>
<td><strong>Degree</strong></td>
<td>Bachelor of Science</td>
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<tr>
<td><strong>College</strong></td>
<td>School of Science &amp; Technology</td>
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<tr>
<td><strong>Major</strong></td>
<td>Math - Pure Math</td>
</tr>
<tr>
<td><strong>Minor</strong></td>
<td></td>
</tr>
</tbody>
</table>
- Save all blocks as txt files
- Moving from PC Scribe to Scribe on the Web
Degree Works Features

- Original Planner and Student Educational Planner (SEP)
- Course Program of Study (CPOS)
- Athletic Eligibility Audits
Issue Resolution

• Reference documentation
• Work with Ellucian
• Retest
Issue Resolution

- Is it upgrade related?
- Check CRs and Defects – are there patches available?
- Local resolution vs consulting Ellucian
- Is it a show stopper?
- Migrate TEST updates
- Confirm settings

**Final Testing**
- New test population
- Use test plan
- Document issues
At Minimum

- Save all Scribe blocks in .txt files
- Discuss authentication methods with technical staff
- Check server capacity
- Track changes between TEST upgrade and PROD upgrade
- Check unhooked exceptions post-upgrade
- Resolve issues in TEST before moving to PROD
Degree Works Version Updates

4.1.5 and 4.1.6
• SSO and Authentication issues
• Scribe on the Web

5.0+
• Composer
• RabbitMQ
• Scribe on the Web required
Resources

• Ellucian Documentation
  – https://ellucian.okta.com/
  – If you cannot access the Ellucian Hub, please contact your institution’s Banner Project Leader.
  – Degree Works Transit User Guide
  – Degree Works Technical Guide
  – Banner Considerations Technical Guide

• GeorgiaBEST Training
  - http://www.usg.edu/georgia_best/training

• Helpdesk
  – Helpdesk@usg.edu