

This document describes outline the recommended steps that each department should use for performing a negative test for Banner Database Oracle Upgrade Project. The tentative goLive date is May 4, 2019. Any processing that is critical to your office or that is run frequently by your office is a good candidate for testing, especially ones that are likely to be used right after the upgrade.

The Departmental Testing Area list below outlines some of the main Banner functions that each department should execute in the test environment. This is only a starting point since you are the most knowledgeable about your business.

We are testing using the JACK test environment. Use the Icon on the portal under the Banner 9 tab or icons under the common drive.

Departmental Testing Areas

- **Academic Advising**
Schedules (SFRSCHD)
- **Academic Affairs/Dean's Office**
Faculty assignment (SIAASGN) SIAINST
- **Admissions**
Load processes: SAT, Common/Royall Apps
SFTP sites: Royall – get and put functions
?SFTP sites: Commonapp?
Get apps and documents from Royall and
CommonApp
Manual application entry
SRAQUIK – to test a quick flow
- **Advancement**
Process gift
General usage of forms (ie. Can you search for someone, update/insert an address, connect someone in APAXREF, etc)
Finance Feed (ADPFEEED)
Student-Advancement Interface (APPSTDI)
CWIS 282 – Donor Code for New Parents (inserts to
apbcons/aprcatg/aprehis/goremal/amrinfo/amrprrt/amrstaf/amrpusr)
CWIS 599 – CPRT to PRNT - updates aprcatg
CWIS 620 – CM Name – updates spbpers/apbcons/aprxref/aprcsps
CWIS 672 – PAL Graduation Roll – inserts to apramaj
CWIS 1061 – Alumni to Constituent – inserts to amrinfo/amrprrt/amrstaf
CWIS 1641 – Reeher Download – writes to IA uploads
SFTP site: reeher – get and put files

- **Athletics**
 - Enter data on SGASPR form
 - Use common forms
- **Continuing Education and Graduate Studies**
 - Course Registration
 - Schedules (Evisions) (SFRSCHD)
 - Faculty Assignment
 - Class Roster (SFRSLST)
 - Jitterbit Integrations to Salesforce
- **Finance**

Procedures to Platform Upgrade (Oracle Database)

General: There are two types of upgrades that will require testing. A Banner upgrade is the most common and is an upgrade of the Ellucian provided Banner software. The Banner software runs on an Oracle platform. An upgrade of the Oracle system is considered a platform upgrade. While the Banner Software is NOT changing as a result of a platform upgrade the way Banner interacts with Oracle can be affected and needs to be tested as a result.

Testing Focus: the testing required for a platform upgrade should be geared towards verifying mission critical tasks will still function as expected as opposed to checking that all forms work as before.

Applications that are most at risk of being adversely affected by a platform upgrade are those processes that write files to the uploads area. With that in mind the following guide has been created to identify what to test as part of a platform upgrade.

I. Tasks to Test

Verify the following tasks continue to work under the new platform:

1. The Nightly Feed:
 - a. Coordinate with the Tech Ctr to launch the nightly feed in TEST and confirm that it runs as expected and generates the correct files in the UPLOADS drive
2. EVISIONS Testing
 - a. Verify that processes that interface with Evisions still work
 - b. Generate a PO via Evisions to confirm the interface is intact
3. Check Run:
 - a. Create a test run of the Check process in TEST
 - b. Verify that the process to generate checks in TEST aligns with the process in PROD paying attention to run times to determine if TEST is slower than PROD (which could indicate a problem)
 - c. Print a check via Evisions. The link between Banner and Evisions is particularly susceptible to problems due to a platform upgrade
4. The "POST"
 - a. Manually run the post FGRACGT and FGRAPPL to confirm the process works without incident before testing the "post" process to run the post from automated process
 - b. Coordinate with the Tech Ctr to submit the "post" in TEST to confirm:
 - i. It posts transactions to the GL

BANNER DATABASE UPGRADE TEST PLAN

- ii. The LOG file that gets created can be viewed
5. FUPLOAD
 - a. Create a test transaction to load to the Excel file used for FUPLOAD
 - b. Using the Excel file create the TXT file to FUPLOAD
 - c. Run the FUPLOAD process to confirm the transaction posts without incident
 - d. Make note of the processing time to verify the process runs in a similar amount of time as in PROD.
6. CWIS 1017 download to UPLOADS
 - a. Coordinate with the Tech Ctr to run the process in TEST to output the data to the UPLOADS area.
 - b. Confirm that the downloaded file can be imported into the Admissions Dashboard
7. NELNET – Student refunds
 - a. Create a test to insure that a student refund record is created
 - b. The record can be read by NELNET
 - c. A student refund can/would be generated

II. Form Testing

As stated earlier, a platform upgrade does NOT include any changes to Banner Forms. As such, it is unlikely that you should observe any difference in the behavior of any forms. This should not absolve us from testing any forms. At a minimum, certain mission critical forms ought to be tested to insure:

- a. The form looks the same/as expected
- b. Navigating the form is unchanged. Pay particular attention to any lag in processing time as you test the form. It is possible the form works but at a slower processing speed. These performance issues should be noted for corrective action
- c. Changes to data within the form are possible and occur as expected

Mission critical forms can be found on the Finance Banner testing checklist at:

[\\Currynet\\share\\$\\Department\\$\\Finance\\$\\Documentation\\Banner Finance - Testing Checklist.xls](\\Currynet\\share$\\Department$\\Finance$\\Documentation\\Banner Finance - Testing Checklist.xls)

- **Human Resources**

Annual processes (Budget Roll NBPBROL, Mass Salary Update NBPMAS)
(Advised to test about a week before end of Fiscal Year.)
Enter new employee
Job change
Tableau – HR_INFORMATION_VIEW

- **PAL**

Use common forms

- **Registrar**

CAPP Compliance (Degree Audit) (SHRDEGS, SMRBCMP, SMPCPRG)
Grades/GPA (SHRGRDE, SHRCGPA)
Academic Standing (SHRASTD)

BANNER DATABASE UPGRADE TEST PLAN

Rolls (SHRROLL, SSRROLL)
Schedules (Evisions)
Population selections
Clearinghouse (SFRNSLC)
Courses (SHRRPTS)
Transcripts/E-transcripts
(SHRTRTC)
Web registration
Schedules
(SFRSCHD/SGAREGS)
Course Registration
(SFAREGS)

- **Student Affairs**

All departments, where applicable

Banner Forms (although the forms are not changing, please check to make sure those that you use perform as expected)
Population selections
Portal web forms
CWIS

Bookstore (Follett, Erin Niemisto)

Colonel Cash

Campus Life (Bettie Kilcoyne, Jeanne Anderson)

CBORD Odyssey PCS/Admin Web (Colonel Cash)
GET

Community Standards & Accountability (Zach Irish, Jeanne Anderson)

Conduct Manager **MAXIENT**

Conference Services (Anne Beaumont)

Counseling Center (Alison Markson, Carol Moser)

Diversity & Inclusion (Jeannette Buntin)

Dining Services (Keith Meal, Jeanne Anderson)

CBORD Odyssey PCS
GET

Fitness & Recreation (Sarah Snyder)

Health Services (Erin Simmons, Carol Moser, Jeanne Anderson)

PyraMED (**database link transfer**)

BANNER DATABASE UPGRADE TEST PLAN

Public Safety (Jayne Savioli, Elizabeth Channell, Jeanne Anderson)

Blackboard ConnectED (Emergency Alert System) **CONNECT_ED**

C-Cure 9000 (ID cards, card access) **PHOTOS**

CWIS processes like:

- Vehicle Registration and Parking Permits

- ID Card Management (includes Photos)

- Parking Tickets

- Incident Reporting

- Dispatch Logs

Residence Life & Housing (Stephanie Alliette, Dan Cline)

Housing Roll (SLRROLL)

Room and meal assignments (SLARMAP, SLARASG, SLAMASG)

CWIS processes like:

- FY Housing, Senior Celebrations Housing **STLIFE**

- Room Damage Recording and Billing

- Card Access Exceptions

- Housing Selection

- Banner/CBORD reconciliations

Odyssey PCS/Admin Web (commuter meal plans)

Spiritual Life (Terry Hofmann)

Student Activities (Anna Lombardo, Heather Wyatt)

Presence Uploads

Student Affairs/Dean of Students (Jen Golojuch-Borden)

Student Affairs Technology (Jeanne Anderson)

Banner/C-Cure discrepancies **STLIFE**

JANDERSO0809

Student Center (Scott Daube)

Wellness Education (Devon Corbett)

- **SFS**

- Bursar

- Set up and run bills (TSRCBIL)

- Evisions Bills

- Disbursements (RPEDISB)

- Fee Assessment (SFRFASC, SLRFASM)

- 1098's (TSP1098, TSRTRAF)

- TMS Weekly Payment Upload (cc0591)

- TMS Nightly Contracts Upload (cc1491)

- CC1262 Bookstore Vouchers download
from Follett

- CC1234 - Process Outbound File for

BANNER DATABASE UPGRADE TEST PLAN

Bookstore Vouchers, via the Linux root
cron.

Financial Aid

Nightly Processes (RORBPST, RORGRPS, RPEPELL)
Financial Aid ROARMAN Processing
Pell Calculation/FM calc
COD Extract (REREX##, RERGRNT, RERIM##)
ISIR Dataload/ Corrections (RCBTP##, RCPTP##, RCRTTP##, RCPMTCH)
Packaging & Awarding
Loan Certification (RPRLORC)
SAP processing
Award
Letters

- **Tech Center**

Use common forms (GSASECR, GOBTPAC, SPAIDEN)
CWIS 1040 – writes to blackboard drive - /mnt/systems/Snapshot
Blackboard sync – can we test? (Aziz)
MyCurry Poral – check w/ campusEAI to see how portal is connecting to the db
Curry MobileApp - check w/ campusEAI to see how portal is connecting to the db
QA Process