Information Technology Services

Test Plan

Facilities Release 1.3

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Test Plan for Facilities Release 1.3

Preparation for Testing

Facilities Release 1.3 and Data Collections ETL (ZADMETL) 1.3 must be applied to your TEST database used to prepare for testing.

Please follow the steps below to prepare for testing the release:

Step 1

Apply Facilities Release 1.3 to the Banner database using the parameters for Fall FT 20232.

Step 2

Setup and/or identify test cases for testing the extraction and editor.

Step 3

In Banner, run the Data Collection Extraction process (ZADMETL) from Banner Job Submission (GJAPCTL). For the Facilities Inventory Data Collection, use 'F' for parameter '01 – Data Collection to Extract?'

Step 4

Turn on the ITS version of GlobalProtect VPN. For download, install, and login instructions, email DW_Test@usg.edu.

Step 5

Run the USG Extract in the TEST environment using the following URL:

https://appst.ds.usg.edu/ords/f?p=38576

Step 6

Review the Data Submission Error report to validate changes included in the release in the Cognos TEST environment using the following URL:

https://analyticst.ds.usg.edu/bi/

County Location Codes

Purpose

In past collections, some institutions may have experienced issues with the submission of County Location Codes '888' for Out-of-Country and '999' for Out-of-State. ITS identified an issue with logic in the FIDC Campus ETL that was incorrectly collecting some untranslated County Location Codes that start with 'GA' (i.e., 'GA888' and 'GA999').

Functionality delivered with this release:

Facilities Release 1.3 includes modification to the collection logic to correctly collect the following County Location Codes:

- 888 – Out-of-Country
- 999 – Out-of-State

For additional information on County Location Code (BUI008), including instructions for setup in Banner, please see Appendix A: Banner Setup for County Location Codes.

Test Scenario 1:

If your institution has a building that is located Out-of-State or Out-of-Country, assign the applicable County Location Code to the building on the Banner Building Definition (SLABLDG) page. If your institution does not have a building that is Out-of-State or Out-of-Country, you may temporarily change the County Location Code for an existing building that is located in state.

If your institution uses 5 character County Location Codes, such as 'GA888' or 'GA999', you must translate the Banner value to Regents Location Code 888 or 999 on the Banner EDI Cross-Reference Rules (SOAXREF) page using translation label 'RGTCNTY'.

County Location Code	Description
888	Out-of-Country
999	Out-of-State

Run the ZADMETL process for parameter value 'F' to generate output for FIDC. Review the .lis file output for any errors. If ZADMETL completed successfully, run the FIDC extraction.

In Cognos, navigate to Data Collection Review > Table Dump – FIDM Building to review collected building data. Verify that the correct County Location Code is listed in the 'County_Code' column for buildings that are Out-of-State or Out-of-Country.

If you made a temporary change to an in-state building, please change the County Location Code back to the original value.

Testing successful? (circle one) Yes / No

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

Signature _____

Title _____

Room Use Codes

Purpose

Room Use Codes are used to identify the primary use or activity for which a room is assigned. The USG Real Estate and Facilities Office has received requests from institutions for a new room use code to identify lactation rooms.

Functionality delivered with this release:

This change includes the creation of Room Use Code '009' for 'Lactation Rooms'. The new code was added to the list of valid Room Use Codes and may be assigned to rooms once the new code is set up in Banner. For information on how to set up a new Room Use Code, please see Appendix B: Banner Setup for Room Use Codes.

Test Scenario 1:

In Cognos, navigate to Reference Tables > FIDM Room Usage Code to view the FIDM Room Usage Code (edw_fidm_room_use_lkp table dump) report.

Verify that the following entry is present in the report:

Facility Inventory Reference Table

FIDM Room Usage Code (edw_fidm_room_use_lkp)

ROOM_USE_CODE	ROOM_USE_DESCR	ROOM_USE_STATIONS_REQ_IND	FROM_TERM	TO_TERM
009	Lactation Room	N	20232	99999
010	Custodial Area	N	00000	99999
020	Circulation Area	N	00000	99999
030	Mechanical Area	N	00000	99999

Testing successful? (circle one) Yes/No

Test Scenario 2:

Set up Room Use Code '009' on the Banner Room Use Code Validation (ZTVRUSE) page. Assign Room Use Code '009' to an existing room on the Banner Supplemental Room Information page (ZLARSUP) and save the change. Run the ZADMETL process for parameter value 'F' to generate output for FIDC. Review the .lis file output for any errors. If ZADMETL completed successfully, run the FIDC extraction.

In Cognos, navigate to Data Collection Review > Table Dump – FIDM Room to review collected room data. Verify that '009' was collected for the specified room.

Testing successful? (circle one) Yes/No

Test Scenario 3:

In Cognos, navigate to Validation Errors > Validation Error Summary. Verify that the following validation rule did not fire for the room used in Test Scenario 2:

VBRM004: Room use code must be valid.

Change the Room Use Code for this room back to the original value.

Testing successful? (circle one) Yes/No

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

_____

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Signature _____

Title _____

Validation Rule Updates

Purpose

According to the USG Real Estate and Facilities Office, Program Class Code (BRM005) is not currently used or verified by the system office. As a result, validations related to Program Class Code are not needed and may complicate the collection process for institutions. In addition, changes in validation rules related to Number of Stations were requested to focus station validations on instructional and office spaces where those validations inform analysis.

Functionality delivered with this release:

Validation rules related to Program Class Code (BRM005) have been inactivated. This includes the following validation rules:

- Room Use Code (BRM004)
  - VBRM008 - room use code 010, 020, 030, or 040 must have program class code 90.

- Program Class Code (BRM005)
  - VBRM009 - program class code missing or not numeric.
  - VBRM010 - program class code must be valid.

For data element Number of Stations (BRM006), validation rule VBRM014 was modified to validate only instructional and office spaces where needed for analysis. A new validation was created for room use codes that will no longer be validated under VBRM014. The new and modified validations are as follows:

- Number of Stations (BRM006)
  - VBRM014 - Number of stations must be greater than 0 for room use codes 110, 211, 212, 213 and 310.
  - VBRM016 - Number of stations must be greater than or equal to zero for room use codes 221, 222, 230, 250, 350, 410, 411, 412, 430, 611, 612, 680.

Finally, the Facilities Data Element Dictionary (DED) was updated to document the above changes and improve formatting where needed.

Note for Banner Institutions: Although some validations related to Program Class Code and Number of Stations in the FIDC have been relaxed or inactivated, there may be constraints on related Banner pages that prevent removing or adding invalid values.

Test Scenario 1:

In Cognos, generate a data element dictionary using the Data Dictionary > Download PDF option.

Verify the listed edits to the following data elements:

Room Use Code (BRM004):

- The Validation Rules section should display:
  - Status: Active
    - VBRM004 - Room use code must be valid.
  - Status: Inactive
    - VBRM005 - Room use code 111 must have number of stations less than 51.
    - VBRM006 - Room use code 112 must have number of stations greater than 50.
    - VBRM007 - Room use code 111 or 112 requires square feet per station between 1 and 40.
    - VBRM008 - Room use code 010, 020, 030, or 040 must have program class code 90.
- The Data Source section should display:
  - Provide: Banner
  - Table: ZLRRSUP
  - Column: ZLRRSUP.ZLRRSUP_RUSE_CODE
  - GUI Name: ZLARSUP
  - GUI Label: Rm Use
  - SOAXREF Translation Code:
- The Change History section should display:
  - Academic Term: 20232
  - Change Date: September 9, 2022
  - Change Notes: Inactivated validation VBRM008. Corrected the Data Source Table name and added Room Use Code ‘009’ to the EDW_FIDM_ROOM_USE_LKP table as a valid value.

Program Class Code (BRM005)

- The Business Practice section should display:
  - The Program Class Code field is used to identify the primary functional category of a room. This coding is designed to enhance the financial analysis and budgeting of space allocation, and to support efforts in institutional research and effectiveness.

    The USG Program Class Code taxonomy is an adaptation of the NACUBO functional use taxonomy and is also loosely related to OMB Circular A-21 (used to calculate ICR for Federally sponsored activities).

    Program Class should be coded in consultation with the Institution's Chief Business Officer and/or other appropriate budget planners and managers to ensure accuracy and analytical utility.

    Values and descriptions are maintained within Banner in the Program Class Code Validation Form (ZTVPGCL). ITS maintains valid values.
- The Validation Rules section should display:
  - Status: Inactive
    - VBRM009 - Program class code missing or not numeric.

        - VBRM010 - Program class code must be valid.
- The Data Source section should display:
    - Provide: Banner
    - Table: ZLRRSUP
    - Column: ZLRRSUP.ZLRRSUP_PGCL_CODE
    - GUI Name: ZLARSUP
    - GUI Label: Rm Use
    - SOAXREF Translation Code:
- The Change History section should display:
    - Academic Term: 20232
    - Change Date: September 9, 2022
    - Change Notes: Inactivated validations VBRM009 and VBRM010. Corrected the Data Source Table name.

Number of Stations (BRM006)

- The Validation Rules section should display:
    - Status: Active
        - VBRM012 - Number of stations invalid for room use codes 010, 020, 030, 040.
        - VBRM014 - Number of stations must be greater than 0 for room use codes 110, 211, 212, 213 and 310.
        - VBRM016 - Number of stations must be greater than or equal to zero for room use codes 221, 222, 230, 250, 350, 410, 411, 412, 430, 611, 612, 680.
    - Status: Inactive
        - VBRM011 - Number of stations missing or not numeric.
        - VBRM013 - Number of stations required for program class code 11, 12, 13, 52, or 81.
- The Data Source section should display:
    - Provide: Banner
    - Table: ZLRRSUP
    - Column: ZLRRSUP.ZLRRSUP_STATION_NUMBER
    - GUI Name: ZLARSUP
    - GUI Label: Number Stations
    - SOAXREF Translation Code:
- The Change History section should display:
    - Academic Term: 20232
    - Change Date: September 9, 2022
    - Change Notes: Edited validations VBRM014 to include only Room Use Codes 110, 211, 212, 213 and 310. Created VBRM016 for Room Use Codes 221, 222, 230, 250, 350, 410, 411, 412, 430, 611, 612, 680. Corrected the Data Source Table name.

Testing successful? (circle one) Yes/No

Test Scenario 2:

Select a room with Room Use Code 010, 020, 030 or 040. Temporarily change the Program Class Code to a value other than 90. Save the record. Run the ZADMETL process for parameter value F to generate output for FIDC. Review the .lis file output for any errors. If ZADMETL completed successfully, run the FIDC extraction.

In Cognos, navigate to Validation Errors > Validation Error Summary. Verify that the following validation rule did not fire for the room:

VBRM008 - room use code 010, 020, 030, or 040 must have program class code 90.

Change the Program Class Code for the room back to the original value.

Testing successful? (circle one) Yes/No

Test Scenario 3 (Table to Table Institutions Only):

For a selected room, change the Program Class Code to an invalid non-numeric value, such as 'XX'. Run the FIDC extraction and verify that the following validation errors did not fire for the edited room:

VBRM009 - program class code missing or not numeric.

VBRM010 - program class code must be valid.

Change the Program Class Code for this room back to the original value.

Testing successful? (circle one) Yes/No

Test Scenario 4 (Table to Table Institutions Only):

Select a room with room use code 110, 211, 212, 213 or 310. Temporarily change the Number of Stations to '0' (zero). Run the FIDC extraction and verify that the following validation errors did fire for the edited room:

VBRM014 - Number of stations must be greater than 0 for room use codes 110, 211, 212, 213 and 310.

Change the Number of Stations for this room back to the original value.

Testing successful? (circle one) Yes/No

Test Scenario 5 (Table to Table Institutions Only):

Select one or more room(s) with room use code 221, 222, 230, 250, 350, 410, 411, 412, 430, 611, 612 or 680. Temporarily change the Number of Stations to '0' (zero). Run the FIDC extraction and verify that the following validation error did not fire for the edited room:

VBRM016 - Number of stations must be greater than or equal to zero for room use codes 221, 222, 230, 250, 350, 410, 411, 412, 430, 611, 612, 680.

Change the Number of Stations for the room(s) back to the original value.

Testing successful? (circle one) Yes/No

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

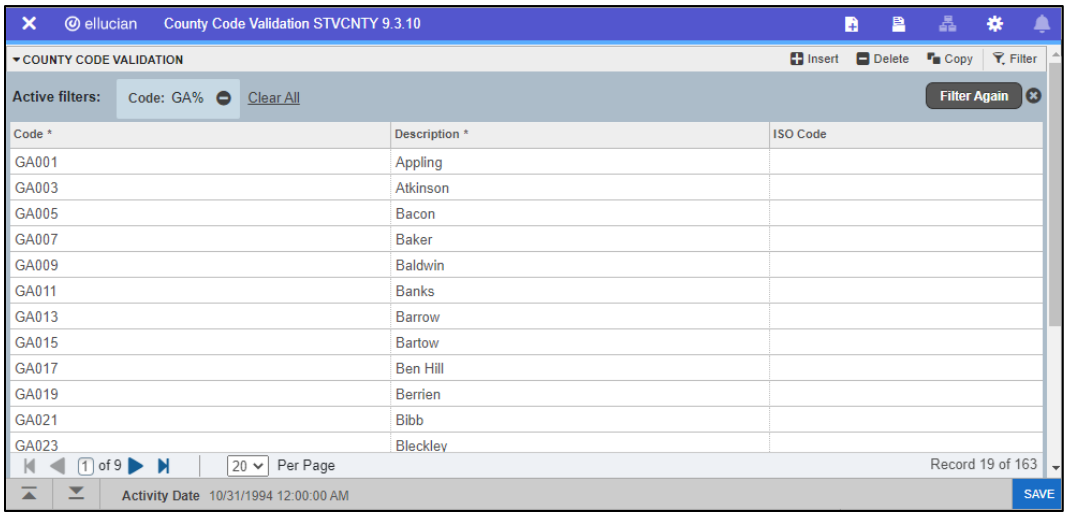
Signature _____

Title _____

Appendix A: Banner Setup for County Location Codes

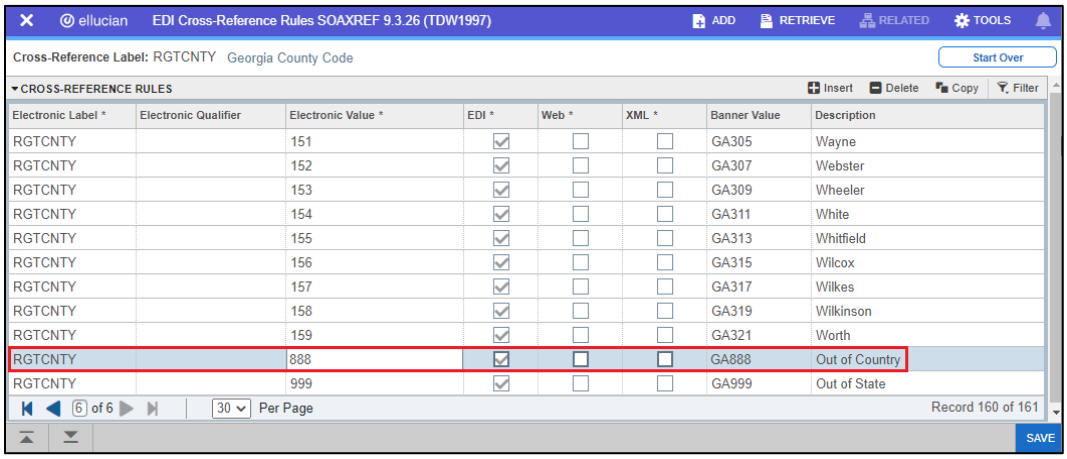
The following steps should be used to establish and assign County Location Codes in Banner:

1. Establish / Review County Location Codes on the Banner County Code Validation page (STVCNTY)



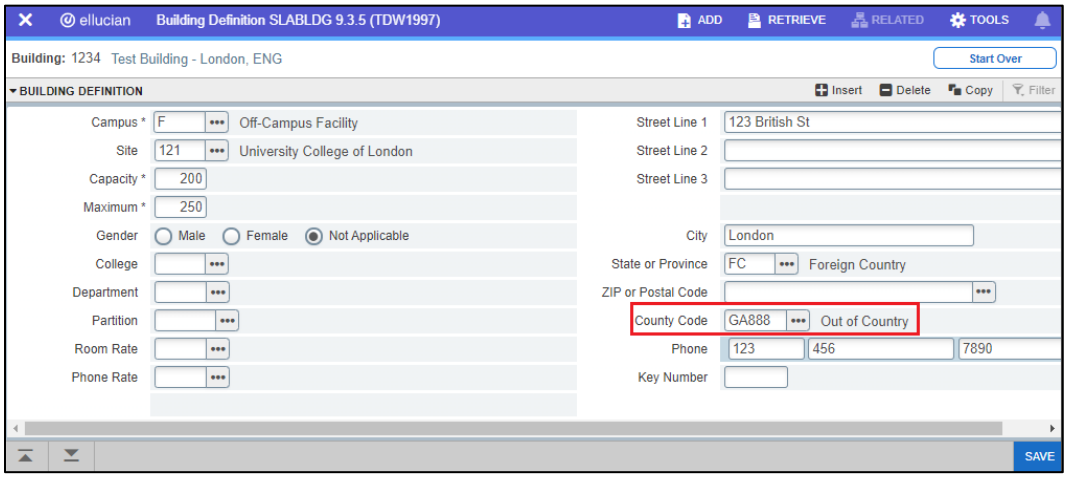
Most, if not all, Georgia counties should already be setup on STVCNTY. The County Location Code for Out-of-Country may be set up as ‘GA888’ or ‘888’ and the County Location Code for Out-of-State may be set up as ‘GA999’ or ‘999’. If your institution uses County Codes beginning with ‘GA’ on the Banner County Code Validation page (STVCNTY), you must translate these codes to valid Regents values on the Banner EDI Cross-Reference Rules (SOAXREF) page.

2. Translate County Codes from the Banner County Code Validation page (STVCNTY) to valid Regents County Location Codes on the Banner EDI Cross-Reference Rules (SOAXREF) page using translation label ‘RGTCNTY’.



In the example above, Banner value ‘GA888’ with description ‘Out-of-Country’ is translated to Regents value (Electronic Value) ‘888’. For a list of valid County Location Codes, please refer to the FIDM County Code Reference Report in Cognos.

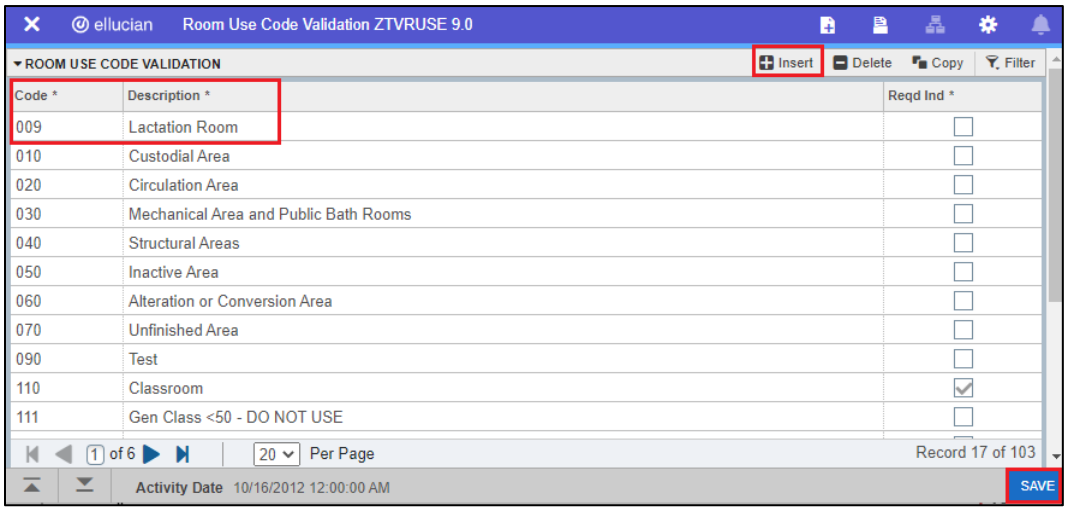
3. Assign County Location Codes to buildings on the Banner Building Definition (SLABLDG) page.

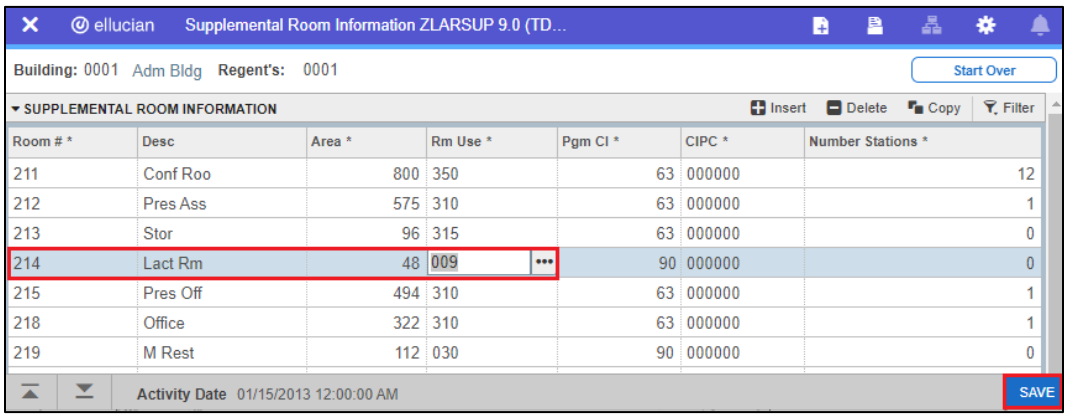


Appendix B: Banner Setup for Room Use Codes

The following steps should be used to establish and assign Room Use Codes in Banner:

1. Establish / Review County Location Codes on the Banner Room Use Code Validation (ZTVRUSE) page.



   To add a new Room Use Code, click “Insert” and enter Code ‘009’ with Description ‘Lactation Room’. Click ‘SAVE’. You may now assign the new code to rooms as applicable.

2. Room Use Codes are assigned to rooms on the Banner Supplemental Room Information page (ZLARSUP). To change the Room Use Code of an existing room, enter the new code in the ‘Rm Use’ column for the applicable ‘Room #’. Click ‘SAVE’.