

| Project | Automated Goal Assignment | | | | | | | | |
|---|--|---|--------------------------|--|-----------|----------------------|-----------------------------|---|--------------|
| LMS Environment | ALPHA3 | | | | | | | | |
| QA Test Sprint | 06/11/18 - 07/22/18 | | | | | | | | |
| UAT Release Sprint | 07/23/2018 - 08/05/18 | | | | | | | | |
| Submit Feedback Email | UAT@latitudecg.com | | | | | | | | |
| Initials of Reviewers | Sarah Robinson (SR), Caroline Lorenz (CL), Brooke Oprsal (BO), Tom Doudna (TD) | | | | | | | | |
| Test Case | Expected Results | Setup Conditions | Steps to Reproduce | Actual Results | Pass/Fail | Test Date - Initials | BUG Ticket ID | Actual Fix/Working as Designed/Out of Scope | Telerik Test |
| LMS Passes Regression Test | TelerikNEWLMS portal is built with baseline data. | Testing environment is "frozen" with complete code package. | Run LMS Regression Test. | Telerik issue with action buttons in modal window. Still working to bring Functional test suite green. | ? | | LAUNCH-4674 | Will run in BETA | |
| LMS Passes Unit Tests | All Unit Tests pass green. | Testing environment is "frozen" with complete code package. | Run complete LMS build. | ALL GREEN | PASS | 7/13 JM | LAUNCH-4636 | | |
| Browser Compatibility | Chrome | ANY browser -- not just Chrome | | Browser back button from Add Goal does not route to Goal Rule | ? | 7/19 SR | LAUNCH-4743 | | |
| | FireFox | | | | PASS | 7/17 SR | | | |
| | Internet Explorer | | | User Filter - default filter is not null. Displays "Audience" criteria, even tho criteria is not applied to Preview User results. | PASS | 7/18 SR | LAUNCH-4856 | | |
| | Safari | | | | PASS | 7/17 SR | | | |
| English User | Site Text in English and Dates formated (MM/DD/YYYY) | | | Hover text missing translations. | PASS | 7/19 BO | LAUNCH-4829 | | |
| English – UK User | Site Text in English and Dates formated (DD/MM/YYYY) | | | | PASS | 7/17 SR | | | |
| English – Australia User | Site Text in English and Dates formated (DD/MM/YYYY) | | | | PASS | 7/17 SR | | | |
| Chinese - China User | Site Text in Chinese and Dates formated (年/月/日) | | | | PASS | 7/17 SR | | | |
| Français – Canada User | Site Text in French and Dates formated (AAAA-MM-JJ) | | | | PASS | 7/17 SR | | | |
| Italian – Italy User | Site Text in Italian and Dates formated (GG/MM/AAAA) | | | | PASS | 7/17 SR | | | |
| Portuguese – Brazil User | Site Text in Portuguese and Dates formated (DD/MM/AAAA) | | | | PASS | 7/17 SR | | | |
| Español – Mexico User | Site Text in Spanish and Dates formated (MM / DD / AAAA) | | | | PASS | 7/17 SR | | | |
| LMS Header elements work from new page. | 1. Logo points Home | | | | PASS | 7/11 SR | | | |
| | 2. Course Search works if enabled. Hidden if disabled. | | | | PASS | 7/11 SR | | | |
| | 3. Home icon points Home | | | | PASS | 7/11 SR | | | |
| | 4. Navigation icon points to Navigation page | | | | PASS | 7/11 SR | | | |
| | 5. Help icon points to DNN page | | | Goal Rules https://www.latitudelearning.com/lms-help/goal-rules Assign Goals https://www.latitudelearning.com/lms-help/assign-goals | PASS | 7/17 SR | | | |
| | 6. My Information menu works | | | | PASS | 7/11 SR | | | |
| | 7. Gear icon displays for roles Location Administrator and above. | | | | PASS | 7/11 SR | | | |

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| New admin features are available in Favorite Tools list. | Goal Rules (Goal Rules) and Assign Goals should be in default Hidden tool list for Portal Admin and Setup Admin roles. Assign Goals should be available to all roles EXCEPT Student and Guest. | | | Tested successfully in ALPHA3 = PASS Portal Admin sees both Goal Rule and Assign Goals. Admin sees Assign Goals Location Admin does not see either. | PASS | 7/17 SR | | | |
| Ensure pages support User Impersonation functionality | When an administrator Impersonates user, all new pages should display end user content. | | | | PASS | 7/11 SR | | | |
| Ensure pages support Switch Profile functionality | Content and branding is updated to user's active organization on Activate Profile and Return to Default actions. | | TVC portal using P2P Hierarchy. UN: latadmin_TVC User's default Location profile (TVCL0) has highest role: Student Assign goals > Organization in Exact Org > TVCL0 = No results Use header tool to Switch Profiles to another Location: Salmon Creek Assign goals > Organization in Exact Org > Salmon Creek = 300+ results | | PASS | 7/20 SR | LAUNCH-4634 | | |
| Ensure new CSS standard styles apply to all pages | All pages use the new standard user interface page template with the common header. | | | Pages do not follow CSS standards | PASS | 7/19 SR | LAUNCH-4716 | | |
| Ensure base.css is brandable | Changes to stylesheet's text, link and header, etc. apply globally across all LMSes. | Change the standard stylesheet's text, link and header, etc. fonts and sizes to something other than default values | Log into multiple portals to verify change. | Pages do not follow CSS standards | PASS | 7/11 SR | LAUNCH-4809 | | |
| Ensure LMS Branding settings cascade to page. | Company level branding overrides global default. Global default no longer displays in portal. | LMS Information page > LMS Branding section displays default content/style files | Change What's New file to custom > Submit. Log in as multiple users to verify. | Add Goal Rule does not have correct pretty.button style | PASS | 7/17 SR | LAUNCH-4625 | | |
| Ensure Organization Branding overrides cascade from Business Unit level | Users under Business Unit "BUA" see different Logo than users outside "BUA" hierarchy. | Brand "BUA" with custom Logo. | Impersonate user at Location tied to "BUA". Then impersonate user at Location outside of "BUA" hierarchy. | | PASS | 7/17 SR | | | |
| Ensure Organization Branding overrides cascade from Division level | Users at Division "DIV1" see different Stylesheet than users outside "DIV1" hierarchy. | Brand "DIV1" with custom Stylesheet. | Impersonate user at Location tied to "DIV1". Then impersonate user at Location outside of "DIV1" hierarchy. | | PASS | 7/17 SR | | | |
| Ensure Organization Branding overrides apply at Location level | Users at Location "BRANDLOC" see different What's New content than users at any other Location. | Brand "BRANDLOC" with custom Stylesheet. | Impersonate user at Location "BRANDLOC". Then impersonate user at other Locations. | | PASS | 7/17 SR | | | |
| Page works properly on Android mobile devices. | Content is easy to read and click. All actions function same as desktop. | | | | PASS | 7/9 BO | | | |
| Page works properly on Apple mobile devices. | Content is easy to read and click. All actions function same as desktop. | | | | PASS | 7/9 BO | | | |
| Verify updates to Left Navigation Menu: | 1. Rename Certification Rules -> Certifications | | | | PASS | 7/11 SR | | | |
| | 2. Rename Certification Management -> Manage Goals | | | | PASS | 7/11 SR | | | |
| | 3. Add Goal Rules and an Assign Goals links under Manage Goals. | | | | PASS | 7/11 SR | | | |
| | 4. Rename Edit Certification Goal Transitions -> Goal Transitions | | | | PASS | 7/11 SR | | | |
| | 5. Rename Manually Calculate Certifications -> Calculate Certifications | | | | PASS | 7/11 SR | | | |
| | 6. Move Search Position Group and Add Position Group to Organizations | | | | PASS | BO 7/20 | LAUNCH-4733 | | |

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| | 7. Move Program Configurations, Search Skill Profiles, Add Skill Profile, Search Programs and Add Program to Certifications | | | | PASS | 7/11 SR | | | |
| Setup Admin, Portal Admin, Admin, Instructor, Location Admin, or Location Manager role can access <i>Assign Goals</i> page. | Students and Guests are only users that cannot access tool. | | | | PASS | 7/17 SR | | | |
| Setup Wizard works to standard | Enforced workflow left to right. Admin cannot skip ahead, must navigate between steps with "Previous" and "Next" buttons. | | | | PASS | 7/17 SR | | | |
| Step1: User Filter - Person-to-Person Hierarchy | 1. User Account is Active 2. User Profile is Active This logic should match My People list. User Profile and Position Code is Primary should NOT be implied. Goal Assignment process should find those users ineligible. | latadmin_TVC | User list is scoped to admin's employees. | Results only match Search User filters when I add criteria: 1. User Profile is Active AND 2. User Profile is Primary | PASS | 7/19 SR | | | |
| | Criteria | Comparison | Notes | Type ahead menus duplicate same value multiple times in match list | ? | 7/19 SR | ZOHO #69120 | Support has a ticket for this, should be resolved with this ticket. (Launch date 7/22) | |
| | Leave data blank, click "Next" button. | | | | PASS | 7/11 SR | | | |
| | Organization | In Exact Organization | Single select, includes all assigned orgs. Type ahead on organization name and code | Location: Battle Ground - In Exact Org = 158 - Not In Exact Org = 1291 | PASS | 7/19 SR | | | |
| | | Not in Exact Organization | Location: Salmon Creek | 1125 matches User Search results | PASS | 7/17 SR | | | |
| | | In Hierarchy | Tested in TVC – confirmed no error occurred. As TVC portal only has one Division and one BU, I tested actual result counts with SROBINSON portal set to P2P Hierarchy. | Robinson Gazette - ONLINE = 53 | PASS | 7/19 SR | | LAUNCH-4858 | |
| | | Not in Hierarchy | Tested in TVC – confirmed no error occurred. As TVC portal only has one Division and one BU, I tested actual result counts with SROBINSON portal set to P2P Hierarchy. | Robinson Gazette - ONLINE = 31 | PASS | 7/19 SR | | LAUNCH-4842 | |
| | Position Group | Is | Single select. Type ahead on position group name and code. Data is unscoped. | TVC Staff = 4 users were assigned "Mandatory Courses for TVC Staff" | PASS | 7/17 SR | | | |
| | | Is Not | | Position Group isn't TVC Staff = 1443 | PASS | 7/19 BO | | LAUNCH-4843 | |
| | Position | Is | Single select. Type ahead on position name and code. Data is unscoped. | Accountant = amccallboss@tvc.org | PASS | 7/17 SR | | | |
| | | Is Not | | 1446 results match Search Users | PASS | 7/17 SR | | | |
| | User Group | Is | Single select. Type ahead on user group name | Administration-87th = 8 results | PASS | 7/17 SR | | | |
| | | Is Not | | 1438 results matches Search Users | PASS | 7/17 SR | | | |
| | Department | Is | Single select. Type ahead on department name. Data is unscoped. | Allergy = jkieswether@tvc.org | PASS | 7/17 SR | | | |
| | | Is Not | | 1447 matches Search User count | PASS | 7/17 SR | | | |
| | Audience | Is | Single select. Type ahead on audience name | 1429 matches Audience Preview User and Search User lists | PASS | 7/17 SR | | | |
| | | Is Not | | 19 matches Search User | PASS | 7/17 SR | | | |

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|---|---|--------------------------------|--|---|------|---------|-------------|-----------------------------|--|
| | User | Is | Single select. Type ahead on user first/last name and username | | PASS | 7/17 SR | | | |
| | | Isn't | | | PASS | 7/17 SR | | | |
| | | Directly reports to | bjwashbu@tvc.org | 29 results match user's Direct Employees list | PASS | 7/17 SR | ZOHO #69973 | | |
| | | Reports up to | latadmin_SROBINSON | latadmin_SROBINSON Impersonate: vbaviskar12345 Assign Goals > User directly reports to P2PMANAGER = 2 result P2PSUBORDINATE P2UserReporting Assign Goals > User reports up to P2PMANAGER = 3 results P2PSUBORDINATE P2UserReporting JimJamJem | PASS | 7/20 SR | | LAUNCH-4863 | |
| | Certification | Has Achieved | Single select. Type ahead on certification name. | | PASS | 7/17 SR | | | |
| | | Assigned but Not Achieved | | | PASS | 7/17 SR | | | |
| | | Not Assigned | | | PASS | 7/17 SR | | | |
| | | Not Achieved | | | PASS | 7/17 SR | | | |
| | | Has Revoked | | | PASS | 7/17 SR | | | |
| | Course | Is Enrolled | Single select. Type ahead on course name and code. Course options scoped to user's catalogs. | Admin gets 36 results in Search User and Assign Goals, but 37 with same filter on Add Goal page. | PASS | 7/17 SR | | | |
| | | Is Not Enrolled | | | PASS | 7/17 SR | | | |
| | | Is On Interest List | | | PASS | 7/17 SR | | | |
| | | Is Not on Interest List | | Again, one extra user pulled into Add Goal page. Seems like bad data? | PASS | 7/17 SR | | | |
| | | Valid Transcript, Passed | | | PASS | 7/17 SR | | | |
| | | Valid Transcript, Never Passed | | | PASS | 7/17 SR | | | |
| Step2: Preview Users returns accurate results based on applied User Filters | Apply a list of filters, verify results. | latadmin_TVC | | | PASS | 7/20 SR | | | |
| Step1: User Filter - Position Code Hierarchy | 1. User Account is Active 2. User Profile is Active This logic should match My People list. User Profile and Position Code is Primary should NOT be implied. Goal Assignment process should find those users ineligible. | | User list is scoped to admin's employees. | Results only match Search User filters when I add criteria: 1. User Profile is Active AND 2. User Profile is Primary | PASS | 7/19 SR | | LAUNCH-4763 | |
| | Criteria | Comparison | Notes | | | | | | |
| | Leave data blank, click "Next" button. | | | | PASS | 7/11 SR | | | |
| | Organization | In Exact Organization | Single select, includes all assigned orgs. Type ahead on organization name and code | | PASS | 7/17 CL | | | |
| | | Not in Exact Organization | | | PASS | 7/17 CL | | | |
| | | In Hierarchy | PRIMROSE SCHOOLS Region 1 Division | Matches Search User results = 4662 | PASS | 7/19 SR | | LAUNCH-4858 | |
| | | Not in Hierarchy | PRIMROSE SCHOOLS Region 1 Division | Matches Search User results = 9813 | PASS | 7/19 SR | | LAUNCH-4842 | |
| | Position Group | Is | Single select. Type ahead on position group name and code. Data is unscoped. | Business Consultant = 102 | PASS | 7/19 SR | | | |
| | | Is Not | | Business Consultant = 14399 | PASS | 7/19 SR | | LAUNCH-4843 | |

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| | Position | Is 1. portal admin - Add Goal Rule 2. loc admin - Assign Goal | Impersonate primrose user GMolokai.PrimroseMAUI His Employees > Location Employees shows 7 users, 4 of which have Teacher set as their primary position and those 4 users are displayed on Department Certs. When I went to Assign Goal > selected Position IS Teacher, the preview showed 7 users. You indicated that the other 3 would be considered ineligible because Teacher is not their primary position. PKahuna.PrimroseWAIKIKI and KRubino.PrimroseWAIKIKI should have been ineligible. | Glenn Molokai, The auto-assign rule "Manual Run @ 7/19/2018 5:38:17 PM" that you scheduled ran successfully. Total Users Processed: 7 # Users Processed not part of population: 0 Results By Certifications: Certification Name: Teacher TEST-1802 # of Users Goal assigned: 4 # of Users ineligible: 3 # of goals Due date updated: 0 # of Users already has goal: 0 # of Users removed: 0 | PASS | 7/19 SR | | | |
| | | Is Not | Position ISN'T Teacher | Matches Search User results = 2109 | PASS | 7/19 SR | LAUNCH-4857 | | |
| | User Group | Is | Single select. Type ahead on user group name | | PASS | 7/17 CL | | | |
| | | Is Not | | | PASS | 7/17 CL | | | |
| | Department | Is | Single select. Type ahead on department name. Data is unscoped. | | PASS | 7/17 CL | | | |
| | | Is Not | | | PASS | 7/17 CL | | | |
| | Audience | Is | Single select. Type ahead on audience name | Teacher Basics = 393 | PASS | 7/19 SR | | | |
| | | Is Not | Results status assumes the few differences in user count is due to bad data (PrimroseLM has lots!) | Assign Goals= 14078 Goal Rule = 14081 Search Users = 14083 | PASS | 7/19 SR | | | |
| | User | Is | Single select. Type ahead on user first/last name and username | | PASS | 7/17 CL | | | |
| | | Isn't | In Primrose portal > impersonate user PKahuna.PrimroseWAIKIKI > go to +Goals > select User filter = User. JDoe.PrimroseMAUI has Active Account with expired profile in the Waikiki location. | JDoe.PrimroseMAUI shows up in type ahead for Batch Enroll others and Assign Goals filters, but in both tools, user is NOT returned in "Preview Users" results. Working as designed. | PASS | 7/20 SR | LAUNCH-4865 | | |
| | | Directly reports to | | Criteria was built with logic for P2P relationships. Missing logic to return users based on Position Code relationships | FAIL | 7/17 CL | LAUNCH-4862 | | |
| | | Reports up to | | Criteria was built with logic for P2P relationships. Missing logic to return users based on Position Code relationships | FAIL | 7/19 SR | LAUNCH-4862 | | |
| | Certification | Has Achieved | Single select. Type ahead on certification name. | | PASS | 7/17 CL | | | |
| | | Assigned but Not Achieved | | | PASS | 7/17 CL | | | |
| | | Not Assigned | | | PASS | 7/17 CL | | | |
| | | Not Achieved | | | PASS | 7/17 CL | | | |
| | | Has Revoked | | | PASS | 7/17 CL | | | |
| | Course | Is Enrolled | Single select. Type ahead on course name and code. Course options scoped to user's catalogs. | | PASS | 7/17 CL | | | |
| | | Is Not Enrolled | | | PASS | 7/17 CL | | | |
| | | Is On Interest List | | | PASS | 7/17 CL | | | |
| | | Is Not on Interest List | | | PASS | 7/17 CL | | | |
| | | Valid Transcript, Passed | | | PASS | 7/17 CL | | | |
| | | Valid Transcript, Never Passed | | | PASS | 7/17 CL | | | |

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| Step2: Preview Users returns accurate results based on applied User Filters | Apply a list of filters, verify results. | latadmin_primroselms | Course - Kindergarten CR Training 1 Position Group - teacher Cert - assigned but not achieved | | PASS | 7/17 CL | | | |
| Preview Users paginataion component works. | | | | BUG: "Items per page" count FIXED: Pagination control breaks. Previous and Next buttons do not work. | PASS | 7/19 SR | LAUNCH-4742 | | |
| Click back to User Filter page, update criteria, verify results | Users are returned according to new filters. | | | User context is being scoped to default/primary profile only. | PASS | 7/17 SR | | | |
| Step3: Certifications | Admin must select at least one certification from type-ahead menu. Can select more than one. | | Select multiple certifications using type ahead | | PASS | 7/11 SR | | | |
| Step 4: Confirmation | Confirmation page is populated with all config options and data. Offers action buttons: Run, Cancel | | | | PASS | 7/11 SR | | | |
| Run button completes the process. | "Add Successful" immediately assigns training goals as defined, without saving it as a rule. User will remain on the Assign Goals page with message displayed. | | On page confirmation message states that rule is queued. BUG: User does not receive results notification, and no goals are actually assigned. Not sure if process is running on ALPHA3? | Your rule has been queued. You will receive an email when it has been processed and is ready. | PASS | 7/11 SR | | | |
| Run same rule multiple times | After successful run, user can make edits and re-run the rule without exiting the form. | | | "Your rule has been queued..." message only displays first time you click [Run] button. You can continue changing rule and re-running as many times as you want. | PASS | 7/11 SR | | | |
| Cancel button exits the Setup Wizard. | Will blank out all data and return user to first step. | | | | PASS | 7/11 SR | | | |
| Rule Results Notification | User that submitted goal assignment receives an email that includes the number of users selected by the user filter and a summary of the results by certification (i.e. x users assigned goal, x users ineligible for goal) | latadmin_TVC | | | PASS | 7/11 SR | | | |
| Verify goal assignments. | Users in "Preview Users" list were assigned selected Certifications. | latadmin_TVC | | Assign Goals errors out if Users in list do not belong to any Position Groups | PASS | 7/19 SR | LAUNCH-4844 | | |
| Only Portal Admin and Setup Admin roles can access Goal Rules page | Page loads blank list, with "+Goal Rule" button at the top right. Other roles cannot access. | | | Instructor, Student, Adminsitrator all cannot see Goal Rules page | PASS | 7/11 SR | | | |
| Open Add Goal Rule page | Click "+Goal Rule" button at the top right of page that links to the new Add Goal Assignment Rule page. | | | | PASS | 7/11 SR | | | |
| Setup Wizard works to standard | Enforced workflow left to right. Admin cannot skip ahead, must step thru tabs. | | | | PASS | 7/11 SR | | | |
| Step1: Rule | Rule Name is required. Data validation happens with click of "Next" button | | Leave data blank, click "Next" button. | Next button is disabled. | PASS | 7/11 SR | | | |
| Language menu includes standard list, defaults to EN-US. | Allows admin to submit translations. | | Enter at least one rule name translation. | Validation for Rule Name step not enforced for all languages | PASS | 7/19 SR | LAUNCH-4845 | | |
| Step2: User Filter | Optional. When left blank, returns all ACTIVE employees | | Leave data blank, click "Next" button. | | PASS | 7/11 SR | | | |
| | Criteria | Comparison | Notes | | | | | | |
| | Organization | In Exact Organization | Single select. Type ahead on organization name and code | | PASS | 07/18 TD | | | |
| | | Not in Exact Organization | | | PASS | 07/18 TD | | | |

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| | | In Hierarchy | | | PASS | 07/18 TD | | | |
| | | Not in Hierarchy | | | PASS | 07/18 TD | | | |
| | Position Group | Is | Single select. Type ahead on position group name and code. Data is unscoped. | | PASS | 07/18 TD | | | |
| | | Is Not | | | PASS | 07/18 TD | | | |
| | Position | Is | Single select. Type ahead on position name and code. Data is unscoped. | | PASS | 07/18 TD | | | |
| | | Is Not | | | PASS | 07/18 TD | | | |
| | User Group | Is | Single select. Type ahead on user group name | | PASS | 07/18 TD | | | |
| | | Is Not | | | PASS | 07/18 TD | | | |
| | Department | Is | Single select. Type ahead on department name. Data is unscoped. | | PASS | 7/20 SR | | | |
| | | Is Not | | | PASS | 7/20 SR | | | |
| | Audience | Is | Single select. Type ahead on audience name | UN: Latadmin_TV Add Goal Rule > Audience is "Active Users as of 2018" > Next Preview Users results in error- 'Error! Object reference not set to an instance of an object.' | PASS | 7/18 TD works in Polaris | | | LAUNCH-4859 |
| | | Is Not | | | PASS | 7/18 TD works in Polaris | | | LAUNCH-4859 |
| | User | Is | Single select. Type ahead on user first/last name and username | | PASS | 07/18 TD | | | |
| | | Isn't | | | PASS | 07/18 td | | | |
| | | Directly reports to | | | PASS | 07/18 td | | | |
| | | Reports up to | | | PASS | 07/18 td | | | |
| | Certification | Has Achieved | Single select. Type ahead on certification name. | | PASS | 07/18 td | | | |
| | | Assigned but Not Achieved | | | PASS | 07/18 td | | | |
| | | Not Assigned | | | PASS | 07/18 td | | | |
| | | Not Achieved | | | PASS | 07/18 td | | | |
| | | Has Revoked | | | PASS | 07/18 td | | | |
| | Course | Is Enrolled | Single select. Type ahead on course name and code. Course options scoped to user's catalogs. | | PASS | 07/18 td | | | |
| | | Is Not Enrolled | | | PASS | 07/18 td | | | |
| | | Is On Interest List | | | PASS | 07/18 td | | | |
| | | Is Not on Interest List | | | PASS | 07/18 td | | | |
| | | Valid Transcript, Passed | | | PASS | 07/18 td | | | |
| | | Valid Transcript, Never Passed | | | PASS | 07/18 td | | | |
| Step3: Preview Users returns accurate results based on applied User Filters | Apply a list of filters, verify results. | | | | PASS | 7/20 SR | | | LAUNCH-4763 |
| Preview Users paginataion component works. | | | | latadminpolarisdealer Add Goal Rule > User Filter: Course is not enrolled [any] Preview Users > Click to last page of results. Change "Items per page" count. Pagination control breaks. Previous and Next buttons do not work. | PASS | 7/19 BO | | | LAUNCH-4742 |
| Click back to User Filter page, update criteria, verify results | Users are returned according to new filters. | | | | PASS | 7/11 SR | | | |
| Step4: Training Goal | Admin must select at least one certification from type-ahead menu. Can select more than one. | | Select one certification using type ahead | | PASS | 7/11 SR | | | |

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| Step5: Schedule | Frequency and Schedule Range sections work same as Reports page. | | Required field | Not required. | PASS | BO 7/20 | LAUNCH-4637 | | |
| Validate Frequency options and controls | Daily, Weekly, Monthly, On Demand | | | | PASS | 7/16 BO | | | |
| | Weekly setting provides options of Sunday – Saturday, so the day of the week can be chosen. | | | | PASS | 7/11 SR | | | |
| | Monthly setting provides a calendar to select 1-31. A message will appear if the 31st is chosen that the last day of the month will be used, in the event the month does not have 31, 30 or 29 days. | Rule name: Position Group = TVC Staff Schedule: Monthly (18) | | | PASS | 7/20 SR | | | |
| Validate Schedule Range options and controls | Default values: Start Date = Today, End Date = Year from today | | | | PASS | 7/11 SR | | | |
| | Assignment rules are only run between Start and End dates. | Rule name: Expired Monthly Rule - No Goals Schedule: Monthly (1) | | | PASS | 7/20 SR | | | |
| | A calendar widget can be used to set the date. | | | | PASS | 7/11 SR | | | |
| | Start dates and End dates can be in the past or in the future but the End Date must be equal to or greater than Start Date | | | | PASS | 7/10 SR | | | |
| Confirm button displays FINALstep: Setup Confirmation | Setup Confirmation page is populated with all config options and data. Offers action buttons: Edit, Save, Cancel | | | | PASS | 7/10 SR | | | |
| User can navigate fluidly between steps. | User can navigate between steps via "Previous" and "Next" buttons or by clicking tab names. | | | | PASS | 7/10 SR | | | |
| A user attempt to navigate away from the Setup Wizard before clicking "Save" should prompt modal window to Leave Page or Stay. | Standard browser popup with navigation warning: Are you sure you want to navigate away? Any unsaved data will be lost. | | | No navigation prompt, no matter what header link i click. | PASS | 7/19 TD | LAUNCH-4639 | | |
| Cancel button exits the Setup Wizard. | Rule is not saved and user is returned to the Goal Rules page. | | | | PASS | 7/11 SR | | | |
| Save button completes the process. | "Add Successful" saves rule to Goal Rules page without running it. Green status message displayed on page. | | Save rule, review setup. | The auto-assign rule was updated successfully. | PASS | 7/11 SR | | | |
| Finished button returns user to the Goal Rules page. | Cancel button replaced with Finished. | | | | PASS | 7/11 SR | | | |
| Goal Rules page displays sortable columns, pagination, data, actions as expected | Columns: Rule Name (default sort), Frequency, Schedule Range, Action | One rule defined | | | PASS | 7/11 SR | | | |
| Run button allows admin to execute rule on demand. | Run icon (arrow). Submits the Goal Assignment Rule to run immediately. Goals are added as configured. | latadminpolarisdealer open Goal Rule page > run saved rule set to Frequency: On Demand | Goal Rules > Run | Portal Admin is not able to execute rule on demand. | PASS | 7/17 BO | LAUNCH-4786 | | |
| Verify goal assignments. | Users in "Preview Users" list were assigned selected Certifications. | | | Tech were not assigned goals | PASS | 07/19 TD | LAUNCH-4869 | | |

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| Copy button adds a new rule with same exact settings | Click the duplicate icon and a confirmation window will pop up, asking you to confirm rule copy. Click "OK" to add a new rule with same exact settings, named Rule Name_Copy. | | Create multiple rules with different settings to test column sort. | | PASS | 7/11 SR | | | |
| Click column headers to ensure each is sortable. | Rules will sort alphabetically/temporally based on column header click. | Multiple rules defined. | | | PASS | 7/11 SR | | | |
| Delete a Goal Assignment Rule. | Delete icon (trash bin). Click the delete icon to prompt a modal popup and verify if you really want to delete the Goal Assignment rule. | | Confirm deletion. | | PASS | 7/11 SR | | | |
| Deleting a Goal Assignment Rule will delete all user goals created by the rule. | Users assigned goal from rule will no longer have goal set. | | | | PASS | 7/19 SR | | | |
| Edit button opens the Edit Goal Assignment Rule page. | Edit icon (pencil). Opens the Edit Goal Assignment Rule page. | | | | PASS | 7/11 SR | | | |
| Setup Admins and Portal Admins can edit any assignment rule using Edit Wizard. | Setup Confirmation page is populated with all config options and data. Offers action buttons: Edit, Save, Cancel | | | | PASS | 7/17 SR | | | |
| User can navigate fluidly between steps, make edits to any of the following fields. | Same data validation process is happening between each step/page click. | | User can navigate between steps via "Previous" and "Next" buttons or by clicking tab names. | | PASS | 7/11 SR | | | |
| | - Rule Name | | Validate field requirement. | | PASS | 7/11 SR | | | |
| | - Language | | Add more translations. | | PASS | 7/18 SR | | | |
| | - User Filter/Preview Users | | Change filter criteria. | | PASS | 7/11 SR | | | |
| | - Frequency | | Change frequency element. | | PASS | 7/11 SR | | | |
| | - Schedule Range | | Change schedule date range. | | PASS | 7/11 SR | | | |
| The only data element that cannot be edited after rule creation is the list of Certifications | Certifications tab/page is display only -- does not offer edit options. | | | | PASS | 7/11 SR | | | |
| A user attempt to navigate away from the Edit Wizard before clicking "Save" should prompt modal window to Leave Page or Stay. | Standard modal popup with navigation warning: Are you sure you want to navigate away? Any unsaved data will be lost. | | | Edit Goal Assignment Rule > Confirmation page is displaying modal popup with custom content. Should be standard browser message. | PASS | 7/17 BO | | | |
| Cancel button exits the Edit Wizard. | Rule is not saved and user is returned to the Goal Rules page. | | | | PASS | 7/11 SR | | | |
| Save button completes the process. | "Add Successful" saves rule to Goal Rules page without running it. Green status message displayed on page. | | | | PASS | 7/11 SR | | | |
| Finished button returns user to the Goal Rules page. | Cancel button replaced with Finished. | | | | PASS | 7/11 SR | | | |
| Goal Rules page displays rule as edited. | Changes saved successfully. | | | | PASS | 7/11 SR | | | |
| Verify results of autoated rule assignment engine. | all Goal Assignment Rules scheduled to run that day based on their Frequency and Schedule Range (start and end dates are inclusive), and then process goal creation under the Assignment Rule's name according to user data scoping. | | Polaris Rule MSD Certifications (Daily) | Goal Setting did not set goals | Fail | 07/19 td | | LAUNCH-4869 | |
| Assign goals to users that satisfy the user filter criteria. | If the user's position group is eligible for the certification, | | | | PASS | 7/20 SR | | | |

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| | If the user is already assigned the goal by rule | | | | PASS | 7/20 SR | | | |
| | If the same goal assignment has been waived | | | | PASS | 7/20 SR | | | |
| o Else | Assign the certification as a goal | | | | PASS | 7/20 SR | | | |
| | Do not assign the certification as a goal | | | | PASS | 7/20 SR | | | |
| o Else | If the rule previously assigned the certification as a goal | | | | PASS | 7/20 SR | | | |
| | Remove the goal from the user | | | | PASS | 7/20 SR | | | |
| o Else | Do nothing | | | | PASS | 7/20 SR | | | |
| When a user's account is inactivated with an "End Date" that falls on or before today, his Assigned goals are cancelled. | Goals that have already been Achieved or Waived will remain unaffected. | | Find user who has current goals set, inactivate their account. When you reactive the user, they should not have any goals set. | Verified in Alpha3, bcamer had no goals set once I made his profile active again. | PASS | 7/20 BO | | LAUNCH-4642 | |
| Goal Transition and Auto-Assign rules work in tandem - do not overwrite/create duplicate goal records. | Goal Transition and Auto-Assign rules work in tandem -- do not overwrite/create duplicate goal records. | Goal Transitions are currently assigning goals to eligible population. | Create Goal Rule that overlaps same population of users with same certification goal assignment. | Scott updated Goal Transition process to ensure it would not unassign a goal set by Goal Rule. | ? | | | | |
| Position Group eligibility changes | | | | | PASS | 7/20 SR | | | |
| User Filter eligibility changes | | | | | PASS | 7/20 SR | | | |
| Goal Transition is changed. Overlapping Auto-Assign rule catches users. | | | | Scott updated Goal Transition process to ensure it would not unassign a goal set by Goal Rule. | ? | | | | |
| Admin manually assigns cert already set as goal | No duplicate goals assigned. Results notifications reports conflict. | | | | PASS | 7/17 SR | | | |
| Admin uses View Goals page to assign certification. At least one user is already assigned the goal. | No duplicate goals assigned. | | | | PASS | 7/17 SR | | | |
| Manager assigns cert already set as goal | No duplicate goals assigned. Results notifications reports conflict. | | | | PASS | 7/17 SR | | | |
| Manager assigns curriculum already set as goal. | Department Curriculum page does not assign duplicate goals. | | | | PASS | 7/17 SR | | | |
| Self-Assign Certification/Curriculum Goal | Functionality remains same. | Link only displays in portals that have LMS Information setting "Self-Assign Goals " enabled | | | PASS | 7/11 SR | | | |
| | Verify goals were added as defined. | | | | PASS | 7/17 SR | | | |
| | Self-assigned goals offer "X" in action column. | | | | PASS | 7/17 SR | | | |
| | Users ONLY remove self-assigned goals | | | | PASS | 7/17 SR | | | |
| Goal Assignment user filter should apply implicit criteria 1. User Account is Active 2. User Profile is Active | This logic should match My People list. User Profile and Position Code is Primary should NOT be implied. Goal Assignment process should find those users ineligible. | | | | PASS | 7/19 SR | | LAUNCH-4763 | |
| Automated notifications are created to standard. | Results notification should be available under Site Management > Edit Messages list. | | | Goal Assignment Schedule Ran | PASS | 7/11 SR | | | |

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| | Default content is populated for all language packs | | | 1. Message Center versions were commented out in the script 2. German translations were using wrong language ID 3. Chinese was garbled because the script was using varchar instead of nvarchar variables BETA: Need to remove existing messages before script can be run again. | PASS | 7/17 SR | | |
| Users should receive a results message based on success/error of assignment process. | | | | | PASS | 7/17 SR | | |
| Reports > Scheduled Reports component | Updates to shared scheduling component works in Reports | | can select same start/end dates weekly must select day of week monthly must select day of month | latadmin_MWE, requires frequency now. | PASS | 7/20 BO | LAUNCH-4783 | |
| | | | | Reporting Results username incorrect | PASS | 7/19 BO | LAUNCH-4672 | |
| PolarisDealer | Client specific CSS | | | PolarisDealer fields centered | PASS | 7/19 BO | LAUNCH-4853 | |
| Goal Rules results hard to track without audit info | | | | | | | LAUNCH-4737 | |
| Goal Rule determines cert list order on user's Certification tab. | Goal Rule displays in order First - last in list | Goal Transitions determines cert display order on student's Certification tab. | | | PASS | 7/19 TD | | |
| Edit Rule > allow admin to reorder list? | | | | | | | | |
| Edit Rule - add loading icon until Confirmation page loads | | | | | PASS | 7/20 SR | LAUNCH-4870 | |