Release 1242

Service Request 14817
Budgetary End Dates

Test Plan

Document Number testplan.doc

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Office of the President
University of California
Overview of Test Goals

This Test Plan intends to demonstrate that the modifications in this release successfully implement Budgetary End Dates in PPS. This plan includes test cases that use the new feature, as well as others that do not, to insure that the modifications work only for their intended purpose.

The Test Plan includes descriptions of each test case, as well as a listing of data elements that make up the transactions for each test case.
Test Cases:

The following pages summarize the included test cases.

**EMPLOYEE ID:** 000050063

*Case Description*
Active employee, Student Status = 1, with a 25% indefinite appointment. Adding a 25% appointment for 11 months. Duration of Appointment = B.

*Expected Test Result*
The new appointment will be accepted, changing from BELI=U, RET/FICA=H/M to BELI=1, RET/FICA=U/E.

**EMPLOYEE ID:** 000050088

*Case Description*
Active employee, Student Status = 1, with a 20% indefinite appointment. Adding a 20% appointment for 4 months. Duration of Appointment = B. Also adding a 10% indefinite appointment.

*Expected Test Result*
The new appointment will be accepted, changing from BELI=U, RET/FICA=H/M to BELI=1, RET/FICA=U/E.

**EMPLOYEE ID:** 100000001

*Case Description*
New Hire, Student Status = 1, with an indefinite 100% appointment. Duration of Appointment Code = I.

*Expected Test Result*
The hire will be accepted, with BELI=1, RET/FICA=U/E.
EMPLOYEE ID: 100000002

Case Description
New Hire, Student Status = 2, with an indefinite 50% appointment. Duration of Appointment Code = I.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E.

EMPLOYEE ID: 100000003

Case Description
New Hire, Student Status = 5, with an indefinite 49% appointment. Duration of Appointment Code = I.

Expected Test Result
The hire will be accepted, with BELI=U, RET/FICA=H/M.

EMPLOYEE ID: 100000004

Case Description
New Hire, Student Status = 3 with 16 units, with an indefinite 50% appointment. Duration of Appointment Code = I.

Expected Test Result
The hire will be accepted, with BELI=2, RET/FICA=N/N.
TEST PLAN

**EMPLOYEE ID: 100000005**

**Case Description**
New Hire, Student Status = 1, with a 4 month 100% appointment. Duration of Appointment Code is blank.

**Expected Test Result**
The hire will be accepted, with BELI=3, RET/FICA=H/M.

**EMPLOYEE ID: 100000006**

**Case Description**
New Hire, Student Status = 1, with a 100% appointment for more than one year. Duration of Appointment Code is blank.

**Expected Test Result**
The hire will be accepted, with BELI=1, RET/FICA=U/E. Compare these results with employees 100000001, and 100000009

**EMPLOYEE ID: 100000007**

**Case Description**
New Hire, Student Status = 1, with a 100% appointment for 11 months. Duration of Appointment Code is blank.

**Expected Test Result**
The hire will be accepted, with BELI=3, RET/FICA=H/M. Compare these results to employee 100000010.
EMPLOYEE ID: 100000008

Case Description
New Hire, Student Status = 3 with 16 units, with a 100% appointment for 4 months. Duration of Appointment Code is blank.

Expected Test Result
The hire will be accepted, with BELI=6, RET/FICA=N/N. Compare these results to employee 1000000011.

EMPLOYEE ID: 100000009

Case Description
New Hire, Student Status = 1, with a 100% appointment for more than one year. Duration of Appointment Code = B.

Expected Test Result
The new hire will be accepted, with BELI=1, RET/FICA=U/E. Compare these results to employee 100000006, and 100000001.

EMPLOYEE ID: 100000010

Case Description
New Hire, Student Status = 1, with a 100% appointment for 11 months. Duration of Appointment Code = B.

Expected Test Result
The new hire will be accepted, with BELI=1, RET/FICA=U/E. Compare these results to employee 100000007.
**Case Description**
New Hire, Student Status = 3 with 16 units, with a 100% appointment for 4 months. Duration of Appointment Code = B.

**Expected Test Result**
The new hire will be accepted, with BELI=6, RET/FICA=U/E. Compare these results to employee 100000008.

**Employee ID:** 100000012

**Case Description**
New Hire, Student Status = 3 with 16 units, with a 80% appointment for 4 months. Duration of Appointment Code is blank.

**Expected Test Result**
The hire will be accepted, with BELI=6, RET/FICA=N/N. Compare these results to employee 100000013.

**Employee ID:** 100000013

**Case Description**
New Hire, Student Status = 3 with 16 units, with a 80% appointment for 4 months. Duration of Appointment Code = B.

**Expected Test Result**
The new hire will be accepted, with BELI=6, RET/FICA=N/N. Compare these results to employee 100000012.
EMPLOYEE ID:  100000014

Case Description
New Hire, Student Status = 1, with a 100% indefinite future appointment. Duration of Appointment Code = I.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E.

EMPLOYEE ID:  100000015

Case Description
New Hire, Student Status = 1 with a future 100% appointment for 11 months.

Expected Test Result
The hire will be accepted, with BELI=3, RET/FICA=H/M. Compare these results to employee 100000021.

EMPLOYEE ID:  100000016

Case Description
New Hire, Student Status = 1 with a future, indefinite 49% appointment.

Expected Test Result
The hire will be accepted, with BELI=U, RET/FICA=H/M.
Case Description
New Hire, Student Status = 3 with 16 units, with a future 100% indefinite appointment.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E. Compare the results with employee 100000022.

EMPLOYEE ID: 100000018

Case Description
New Hire, Student Status = 3 with 16 units, with a future indefinite 80% appointment.

Expected Test Result
The hire will be accepted, with BELI=2, RET/FICA=N/N.

EMPLOYEE ID: 100000019

Case Description
New Hire, Student Status = 3 with 16 units, with a future 100% appointment for 4 months.

Expected Test Result
The hire will be accepted, with BELI=3, RET/FICA=N/N. Compare these results with employee 100000023.
Case Description
New Hire, Student Status = 3 with 16 units, with a future 80% appointment for 4 months.

Expected Test Result
The hire will be accepted, with BELI=U, RET/FICA=N/N. Compare these results with employee 100000024.

Case Description
New Hire, Student Status = 1 with a future 100% appointment for 11 months, with Duration of Appointment Code = 'B'.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E. Compare these results with employee 100000015.

Case Description
New Hire, Student Status = 3 with 16 units, with a future 100% indefinite appointment. Duration of Appointment Code = 'B'.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E. Compare these results with employee 100000017.
EMPLOYEE ID: 100000023

Case Description
New Hire, Student Status = 3 with 16 units, with a future 100% appointment for 4 months. Duration of Appointment = 'B'.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E. Compare these results with employee 100000019.

EMPLOYEE ID: 100000024

Case Description
New Hire, Student Status = 3 with 16 units, with a future 80% appointment for 4 months. Duration of Appointment = 'B'.

Expected Test Result
The hire will be accepted, with BELI=2, RET/FICA=N/N. Compare these results with employee 100000020.

EMPLOYEE ID: 100000025

Case Description
New Hire, Student Status = 1, with a 20% appointment for 9 months, and a 30% appointment for 4 months. In both cases Duration of Appointment is B.

Expected Test Result
The hire will be accepted, with BELI=1, RET/FICA=U/E.
Batch Testing

1. LOADVSAM. Load the VSAM CTL
2. LOADCTL. Load the DB2 CTL.
3. LOADEDB. Load the test DB2 EDB.
4. RUN2501. Runs PPP250 to provide a listing of the EDB employees before the report is run, and before additions and updates. Confirm that the following employees show the values as listed:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Assigned BELI</th>
<th>Derived BELI</th>
<th>RET/FICA Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>000050063</td>
<td>WILLIAMS, WALT</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>000050088</td>
<td>ANTHONY, GREG</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>000050201</td>
<td>RIDER, ISAIAH</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>000050202</td>
<td>AUGMON, STACEY</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>000050203</td>
<td>MALONE, L. BOSE</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>000050204</td>
<td>WALLACE, RASHEED</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>000050205</td>
<td>STOUDAMIRE, DAMON</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>000050206</td>
<td>GRANT, GARY</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>000050207</td>
<td>SABONIS, ARVYDAS</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>000050208</td>
<td>JACKSON, JAMES</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>000050209</td>
<td>O’NEAL, JERMAINE</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
</tbody>
</table>

5. RUNOTID. Runs the one-time program PPOT1242 to produce the report, 'REVIEW OF POSSIBLE BUDGETARY END DATES', in Employee ID sequence. Confirm that employees 000050201 through 000050209 listed on the RUN2501 report appear.

6. RUNOTNAM. Runs the one-time program PPOT1242 to produce the same report in Employee Name sequence.

7. RUNOTHOM. Runs the one-time program PPOT1242 to produce the same report in Home Department sequence.

8. RUNFM - runs the File Maintenance jobstream. This uses the CARDEXP member BUDTRANS to update the EDB.
9. RUN2502. Run PPP250 to report on updates made to EDB. Confirm that your results agree with the following:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Assigned BELI</th>
<th>Derived BELI</th>
<th>RET/FICA Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>000050063</td>
<td>WILLIAMS, WALT</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>000050088</td>
<td>ANTHONY, GREG</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000001</td>
<td>HORNECEK, JEFF C</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000002</td>
<td>MALONE, KARL</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000003</td>
<td>RUSSELL, BRYAN</td>
<td>1</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>100000004</td>
<td>FULLER, TODD</td>
<td>4</td>
<td>2</td>
<td>N/N</td>
</tr>
<tr>
<td>100000005</td>
<td>EISLEY, HOWARD</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>100000006</td>
<td>FOSTER, GREG</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000007</td>
<td>DUNCAN, TIM</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>100000008</td>
<td>ROBINSON, DAVID</td>
<td>1</td>
<td>6</td>
<td>N/N</td>
</tr>
<tr>
<td>100000009</td>
<td>MALONEY, MATT</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000010</td>
<td>BARKELY, CHARLES SIR</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000011</td>
<td>PIPPEN, SCOTTIE</td>
<td>1</td>
<td>6</td>
<td>U/E</td>
</tr>
<tr>
<td>100000012</td>
<td>ELLIE, MARIO</td>
<td>1</td>
<td>6</td>
<td>N/N</td>
</tr>
<tr>
<td>100000013</td>
<td>MOBLEY, CUTTINO</td>
<td>1</td>
<td>6</td>
<td>N/N</td>
</tr>
<tr>
<td>100000014</td>
<td>GORDON, FLASH</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000015</td>
<td>ROGERS, BUCK</td>
<td>1</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>100000016</td>
<td>KIRK, JAMES T</td>
<td>2</td>
<td>U</td>
<td>H/M</td>
</tr>
<tr>
<td>100000017</td>
<td>LAFORGE, JORDI</td>
<td>2</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000018</td>
<td>PICARD, JEAN-LUC</td>
<td>2</td>
<td>2</td>
<td>N/N</td>
</tr>
<tr>
<td>100000019</td>
<td>WIGGINS, ENDER</td>
<td>2</td>
<td>3</td>
<td>N/N</td>
</tr>
<tr>
<td>100000020</td>
<td>WIGGINS, VALENTINE</td>
<td>2</td>
<td>U</td>
<td>N/N</td>
</tr>
<tr>
<td>100000021</td>
<td>WIGGINS, PETER</td>
<td>1</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000022</td>
<td>MCCOY, BONES</td>
<td>2</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000023</td>
<td>CRUSHER, BEVERLY</td>
<td>2</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000024</td>
<td>TROY, DEANNA</td>
<td>2</td>
<td>2</td>
<td>N/N</td>
</tr>
<tr>
<td>100000025</td>
<td>RIKER, LT</td>
<td>2</td>
<td>1</td>
<td>U/E</td>
</tr>
</tbody>
</table>

10. RUN170. Runs PPP170 to produce the P.A.F. report. Note that for test cases 100000009, 100000010, 100000011, 100000013, 100000022, 100000023, 100000024, and 100000025, the translation 'BUDGET' is shown next to the Duration of Appointment Code value of 'B'. 
On-Line Testing:

This confirms that the On-line screens IAPP and IAPT display the new value for Duration of Appointment Code, and its translation correctly. It also confirms that the on-line Hire process edits additions and updates to the field appropriately.

1. Logon to CICS and access the main PPS menu.

Result: The Online Applications Main Menu screen appears.

2. Enter HIRE in NextFunc and press Enter to start your campuses Hire process.

Result: The 'EDB Entry/Update Employee Identification' screen appears.

3. Enter the following information in the fields specified, then press Enter:
   Employee ID: 100000026
   SSN: 111111026
   First Name: Hire
   Last Name: Test
   Date of Birth: 010160

Result: The screen reports that your 'Input was accepted'.

4. Press F-11 to get to the next screen in your campuses Hire process.

Result: The 'EDB Entry/Update Employee Personal Data 1' screen appears.

5. Enter a valid address, as well as the following information in the fields specified, then press F-11:
   Sex Code: M
   Ethnic Code: W
   Citizenship Code: C
   Student Status: 1

Result: The 'EDB Entry/Update Personnel-Miscellaneous' screen appears.
6. Enter the following information in the fields specified, then press F-11:
   
   Assigned BELI: 2  
   (BELI)Effective Date: 040199  
   Date of Hire: 040199

   Result: The 'EDB Entry/Update Employee Personal Data 2' screen appears.

7. Enter the following information in the fields specified, then press F-11:

   Oath Signature Date: 010199

   Result: The 'EDB Entry/Update Appointments/Distributions' screen appears.

8. Tab down to the command line and type ADD 10 to add an appointment. Then press Enter.

   Result: The 'EDB Entry/Update Appointments/Distributions' screen returns ready to accept Appointment information.

9. Enter the following information in the fields specified, then press F-5:

   Typ (Appt Type Code): 2  
   Appt Begin (Date): 040199  
   Appt End (Date): 080199  
   Dur(ation of Employment): B  
   Appt Department: 804918  
   Title (Code): 4673  
   %Full (Time Appt): 100  
   F/V (Fixed/Variable Indicator): F  
   Rt (Appt Rate Code): A  
   Sch (Appt Pay Schedule): MO  
   Time (Reporting Code): P  
   Lv (Leave Accrual Code): B

   Result: The new employee is added to the system. You are brought back to the EDB 'Entry/Update Employee Identification' screen.

10. Continue to hire new employees, using the following information:
Appendix A - Page 16
Release 1242 - Budgetary End Dates
Test Plan

<table>
<thead>
<tr>
<th>Test Case 2</th>
<th>Test Case 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID: 100000027</td>
<td>Employee ID: 100000028</td>
</tr>
<tr>
<td>SSN: 111111027</td>
<td>SSN: 111111028</td>
</tr>
<tr>
<td>First Name: Hire</td>
<td>First Name: Hire</td>
</tr>
<tr>
<td>Last Name: Test2</td>
<td>Last Name: Test3</td>
</tr>
<tr>
<td>Date of Birth: 010150</td>
<td>Date of Birth: 010150</td>
</tr>
<tr>
<td>Sex Code: M</td>
<td>Sex Code: M</td>
</tr>
<tr>
<td>Ethnic Code: W</td>
<td>Ethnic Code: W</td>
</tr>
<tr>
<td>Citizenship Code: C</td>
<td>Citizenship Code: C</td>
</tr>
<tr>
<td>Student Status: 1</td>
<td>Student Status: 1</td>
</tr>
<tr>
<td>Assigned BELI: 2</td>
<td>Assigned BELI: 2</td>
</tr>
<tr>
<td>(BELI)Effective Date: 040199</td>
<td>(BELI)Effective Date: 040199</td>
</tr>
<tr>
<td>Date of Hire: 040199</td>
<td>Date of Hire: 040199</td>
</tr>
<tr>
<td>Oath Signature Date: 010199</td>
<td>Oath Signature Date: 010199</td>
</tr>
<tr>
<td>Typ (Appt Type Code): 2</td>
<td>Typ (Appt Type Code): 2</td>
</tr>
<tr>
<td>Appt Begin (Date): 040199</td>
<td>Appt Begin (Date): 040199</td>
</tr>
<tr>
<td>Appt End (Date): 080199</td>
<td>Appt End (Date): 080199</td>
</tr>
<tr>
<td>Appt Department: 804918</td>
<td>Appt Department: 804918</td>
</tr>
<tr>
<td>Title (Code): 4673</td>
<td>Title (Code): 4673</td>
</tr>
<tr>
<td>%Full (Time Appt): 100</td>
<td>%Full (Time Appt): 49</td>
</tr>
<tr>
<td>F/V (Fixed/Variable Indicator): F</td>
<td>F/V (Fixed/Variable Indicator): F</td>
</tr>
<tr>
<td>Rt (Appt Rate Code): A</td>
<td>Rt (Appt Rate Code): A</td>
</tr>
<tr>
<td>Sch (Appt Pay Schedule): MO</td>
<td>Sch (Appt Pay Schedule): MO</td>
</tr>
<tr>
<td>Time (Reporting Code): P</td>
<td>Time (Reporting Code): P</td>
</tr>
<tr>
<td>Lv (Leave Accrual Code): B</td>
<td>Lv (Leave Accrual Code): B</td>
</tr>
</tbody>
</table>

Result: A total of three new employees successfully added.

11. Use the IGEN screen function to view the derivation of RET/FICA and BELI for the above employees:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Derived BELI</th>
<th>RET/FICA Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>100000026</td>
<td>TEST, HIRE</td>
<td>1</td>
<td>U/E</td>
</tr>
<tr>
<td>100000027</td>
<td>TEST2, HIRE</td>
<td>3</td>
<td>H/M</td>
</tr>
<tr>
<td>100000028</td>
<td>TEST3, HIRE</td>
<td>U</td>
<td>H/M</td>
</tr>
</tbody>
</table>
12. Use the EAPP function to update employee 100000027 to have a Duration of Appointment Code value of 'B', update, then view the derivation of RET/FICA and BELI using the IGEN function.

Result: The derivation values have changed, as below:

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Name</th>
<th>Derived BELI</th>
<th>RET/FICA Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>100000027</td>
<td>TEST2, HIRE</td>
<td>1</td>
<td>U/E</td>
</tr>
</tbody>
</table>

13. Key the IAPP function into the Next Func: line, using 100000027.

Result: The 'EDB Inquiry Appointment/Distribution' screen appears. It shows the now valid value of 'B' for Duration of Appointment Code, with a translation of 'BUDGET'.

14. Key the IAPT function using the same Employee ID.

Result: The 'Appointment/Distribution Cmpct' screen appears. It shows the same value of 'B' for Duration of Appointment Code, with a translation of 'BUDGET'.


Result: The revised Help Text for EDB2004 appears, showing the new value 'B' for Duration of Appointment Code and its description.

This concludes the On-Line Testing.