# LMP006 Change Based Feed and Bulk Feed Split by Type - UAT TEST CASES

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| Test Case 01: IDM to Alma feed successful | Pass/Fail |
| **Test Description**: The feed between IDM and Alma runs successfully | |
| **Date tested:** | **Tested by: Alex Forrest** |
| **Preparation:** | **Prep complete/not complete** |
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| TEST ID | BRD ref | P | Test scenario and expected outcome | Pass/Fail | Comments |
| **1.1** | 7.1 | **MH** | The new library system allows updates from IDM patron data  Zip files containing XML user files are placed at the defined S/FTP location where they are fetched and uploaded by Alma |  | **Check for new change-based data.** |
| **1.2** | 7.7 | **SH/MH** | Library will receive the full bulk load file of patron data from IDM weekly. This is less regular than at present (currently received once per day). |  | **Existing cron job changed to run weekly instead of nightly.** |
| **1.3** | 7.3 | **SH** | Library can amend the cron job If the running frequency needs to be changed  Invoked manually from command line  CRON job  (there is no need to change the IDM Lib App itself) | **N/A** | **Cron jon change implemented via Unidesk request.** |
| **1.4** | 7.2 | **MH** | As per the existing bulk feed, the Library will receive a changed based feed including changes to individual patron identity data from IDM and include all details for the individual, not only those fields where data has changed. |  | **Check partial feed with full data per account.** |
| **1.5** | 7.4 | **MH** | For changes only, periodically synchronise the data between both systems to avoid any support issues with failed changes. |  | **Check weekly cron job entry running.** |
| **1.6** | 7.6 | **MH** | The Library Systems Team require that data is passed to Alma in the change based feed once all compulsory fields are populated. | **N/A** | **Fulfilled by 1.4** |
| **1.7** | 7.5 | **MH** | *The Library Systems Team require the change based file to be split into separate files:*   * *Student* * *Staff* * *Visitor* |  | **Check data files split by affiliation type.** |
| **1.8** | 7.8 | **MH** | *The Library Systems Team require the full bulk load file to be split into separate files:*   * *Student* * *Staff* * *Visitor* |  | **Check data files split by affiliation type.** |

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| Test Case 02: IDM to Alma feed unsuccessful | Pass/Fail |
| **Test Description**: The following error scenarios should be tested should the feed be unsuccessful. The error reports were not part of the BRD but have been included in the design | |
| **Date tested:** | **Tested by: Alex Forrest** |

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| TEST ID | BRD ref | P | Test scenario and expected outcome | Pass/Fail | Comments |
| **2.1** | 9.1 | **SH** | Error reports: Zip generation – error email: if the compressed Zip file cannot be generated, an error email will be reported - this will stop the batch process |  | **Simulate eg. invalid directory.**  **Run task and check error email.** |
| **2.2** | 9.1 | **SH** | Error reports: SFTP transfer – error email: if the Zip file cannot be transferred, an error email will be reported - this will stop the batch process |  | **Remove data files.**  **Run task and check error email.** |
| **2.3** | 9.1 | **SH** | Error reports: Retrieving IDM data – warning email: for each batch run, if certain UUNs cannot be retrieved, a warning email contains failed UUNs will be reported - this will not stop the batch process |  | **Check for email errors. Unsure how to simulate.** |

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| Test Case 03: Patron data | Pass/Fail |
| **Test Description**: This will test that the correct identities will be available to Alma from IDM | |
| **Date tested:** | **Tested by: Alex Forrest** |

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| TEST ID | BRD ref | P | Test scenario and expected outcome | Pass/Fail | Comments |
| **3.1** | 8.1 | **M** | IDM sends the identity of post-graduate research student to the library system |  | **Simulate insert/update and check feed.** |
| **3.2** | 8.1 | **M** | IDM sends the identity of post-graduate taught student to the library system |  | **Simulate insert/update and check feed.** |
| **3.3** | 8.1 | **M** | IDM sends the identity of undergraduate student to the library system |  | **Simulate insert/update and check feed.** |
| **3.4** | 8.1 | **M** | IDM sends the identity of staff to the library system |  | **Simulate insert/update and check feed.** |
| **3.5** | 8.1 | **M** | IDM does NOT send the identities of functional, applicant and alumni to the library system - they are not required by Library |  | **Confirm that data files exist for only STUUG, STUPGT, STUGR,STF and VSTF.** |
| **3.6** | 8.1 | **SH** | IDM sends the identity of visiting staff and visiting student to the library system |  | **Not to be tested – this will be in VRS Change Build development** |

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| Test Case 04: Patron data scenarios | Pass/Fail |
| **Test Description**: This will test the different scenarios as laid out in the original mapping exercise under LMP004 | |
| **Date tested:** | **Tested by: Alex Forrest** |

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| **TEST ID** | BRD ref | **P** | **Test scenario and expected outcome** | Pass/Fail | **Comments** |
|  | 8.1 |  | **One active affiliation** |  |  |
| **4.1** |  |  | If a member of staff has only one active affiliation then that affiliation is sent in the IDM to Alma feed |  | **Simulate insert/update and check.** |
| **4.2** |  |  | If a student has only one active affiliation then that affiliation is sent in the IDM to Alma feed |  | **Simulate insert/update and check.** |
| **4.3** |  |  | If a member of staff has only one affiliation and this affiliation currently expiring in IDM, it will be sent in the IDM to Alma feed until one month after the expiry date |  | **Simulate insert/update and check.** |
| **4.4** |  |  | If a member of staff has only one affiliation but this affiliation is expiring in IDM it will be not be sent in the IDM to Alma feed if expiry date plus one month is reached |  | **Simulate suspension and check.** |
|  |  |  | **More than one affiliation – all active** |  |  |
| **4.5** |  |  | If a member of staff has more than one affiliation then the affiliation with the highest value is sent to the IDM to Alma feed (e.g. STF > STUPGR) |  | **Simulate change to account with multiple assignments and ensure that primary affiliation data is sent.** |
| **4.6** |  |  | If a student has more than one affiliation then the affiliation with the highest value is sent in the IDM to Alma feed (e.g. STUPGR > ALUM) |  | **Simulate change to account with multiple enrolments and ensure that primary affiliation data is sent.** |
|  |  |  | **more than one affiliation – not all active** |  |  |
| **4.7** |  |  | If an identity has two affiliations in IDM and only one of the affiliations is active (affiliation 1) and the other is not (affiliation 2 either Suspended or Deleted) then only the active affiliation (affiliation 1) is sent in the IDM to Alma feed |  | **Simulate change to account with one affiliation ageing and check only active affiliation data sent.** |
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| **Expiry– Test that identities are sent in the IDM to Alma feed if they are not due to expire and that they are not sent to in the feed if they have expired** | | | | | |
| **4.8** |  |  | If an identity (staff or student) has more than one active affiliation then the expiry date is mapped to the affiliation that has the longest affiliation end date.  For example, identity has affiliation 1 and affiliation 2,  affiliation 1 > affiliation 2, however affiliation 2 ends on 31/12/2016, whereas affiliation 1 ends on 31/12/2015  therefore “affiliation 1 with expiry date 31/12/2016” is sent to the library  Test for both staff and student | ? | **Need to check requirements spec to see if this is correct.** |
|  |  |  | **Ensure correct end of course date for students** |  |  |
| **4.9** |  |  | **UG Students: -** 120 days + 1 month |  | **Simulate change and check end date.** |
| **4.10** |  |  | **PGT Students: -** 120 days + 3 month |  | **Simulate change and check end date.** |
| **4.11** |  |  | **PGR Students: -** 180 days + 3 month |  | **Simulate change and check end date.** |
|  |  |  | **Test expiry** |  |  |
| **4.12** |  |  | **UG Students:** Primary active affiliations will be sent in the IDM to Alma feed up to one month after expiry date |  | **Simulate expiry and check end date.** |
| **4.13** |  |  | **UG Students:** Primary active affiliations will NOT be sent in the IDM to Alma feed one month after expiry date  Test exactly 1 month and more than 1 month |  | **Simulate suspension and check account not present in feed.** |
| **4.14** |  |  | **PG Students:** Primary active affiliations will be sent in the IDM to Alma feed up to one month after expiry date |  | **Simulate expiry and check end date.** |
| **4.15** |  |  | **PG Students:** Primary active affiliations will NOT be sent in the IDM to Alma feed one month after expiry date  Test exactly 1 month and more than 1 month |  | **Simulate suspension and check account not present in feed.** |
| **4.16** |  |  | **UG Students** with no End date in IDM will be sent in the IDM to Alma feed if their SA38\_EST\_STUDY\_ENDDATE date in EUGEX + 1 month is not reached |  | **Simulate change for student affiliation without end date and data check end date.** |
| **4.17** |  |  | **UG Students** with no End date in IDM will not be sent in the IDM to Alma feed if SA38\_EST\_STUDY\_ENDDATE date in EUGEX + 1 month is reached  Test exactly 1 month and more than 1 month |  | **Check current spec before testing.** |
| **4.18** |  |  | **PG Students** with no End date in IDM will be sent in the IDM to Alma feed if their SA38\_EST\_STUDY\_ENDDATE date in EUGEX + 3 month is not reached |  | **Check current spec before testing** |
| **4.19** |  |  | **PG Students** with no End date in IDM will not be sent in the IDM to Alma feed if SA38\_EST\_STUDY\_ENDDATE date in EUGEX + 3 month is reached  Test exactly 3 months and more than 3 months |  | **Check current spec before testing** |
| **4.20** |  |  | **Staff on permanent contract** will be sent in the IDM to Alma feed until the end of their contract  (Their expiry date is set as end of contract) |  | purge date and expiry date are the same and equal to [load date + five years]  **Check current spec before testing** |
| **4.21** |  |  | **Staff on permanent contract** will not be sent in the IDM to Alma feed if their end of contract is reached  (Their expiry date is set as end of contract) |  | **Check current spec before testing** |
| **4.22** |  |  | **Staff where there is no end of contract** will be sent in the IDM to Alma feed until their expiry date is reached  (Their expiry date is the same as the purge date and the [load date + five years]) |  | **Check current spec before testing** |
| **4.23** |  |  | **Staff** where there is no end of contract will not be sent in the IDM to Alma feed if they have reached their expiry date  ((Their expiry date is the same as the purge date and the [load date + five years]) |  | **Check current spec before testing** |
|  |  |  | **More than one affiliation – all expiring** |  |  |
| **4.24** |  |  | If an identity has multiple affiliations in IDM, and all of the affiliations are expiring then only the ‘highest’ affiliation is sent in the IDM to Alma feed only if the load date is less than 1 month after the expiry date, otherwise this identity will not be processed in the load. |  | **Clarification required. Otherwise ignore.** |
|  |  |  | **Test start dates** |  |  |
| **4.25** |  |  | Start dates are taken from the highest affiliations start date |  | **Post COM021, start dates relate to Primary affiliation.** |
| **4.26** |  |  | Address end date will take expire date |  | **Clarification required. Otherwise ignore.** |
|  |  |  | **Addresses** |  |  |
| **4.27** |  |  | The address format is readable |  |  |
| **4.28** |  |  | Staff address will be work address  (from IDM) | N/A | **Staff addresses not passed** |
| **4.29** |  |  | Student address will be the term address  (from IDM/Eugex) |  | **Simulate change and check address.** |
|  |  |  | **Stats Category** |  |  |
| **4.31** |  |  | The notes field has been moved to the Statistical category page and the Library can view Stats category notes in the form:  Org:UoE:College of Humanities and Social Science:College of Humanities and Social Science:Business School:BUS | N/A | **Test occurs in Alma.** |
|  |  |  | **Other** |  |  |
| **4.32** |  |  | OLL Students will not be sent in the IDM to Alma feed | N/A | **Test occurs in Alma - Already tested via LMP001** |
| **4.32** |  |  | Library card number/bar code is available for each record |  | **Check library/car numbers exist.** |

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| Test Case 05: Account suspension | Pass/Fail |
| **Test Description**: | |
| **Date tested:** | **Tested by: Alex Forrest** |
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| TEST ID | BRD ref | P | Test scenario and expected outcome | Pass/Fail | Comments |
| **5.1** | 10.1 | **M** | For account suspension Library can make an account inactive (determined on purge\_date)  Following rules are successful :   * For all students and staff with expiry date already known, set purge\_date as [expiry\_date + 2 years] * For Staff that has no end date in IDM, both expiry and purge dates will be set to [load date +5 years]. |  | **Simulate changes and check purge date is end date + 2years for STU/STF with end date.**  **Simulate changes and check purge date is end date + 2years for STU/STF with end date.** |
| **5.2** | 10.2 | **M** | For deleted accounts Library can make an account   * Active for a grace period, * Inactive for a set period * then Deleted (from the load)   (in line with University’s data retention policy) | **N/A** | **Action occurs within Alma.** |
| **5.3** | 10.2 | **M** | Library can control deletion of local data as there may be instances where a patron had outstanding fines/fees and items issued | **N/A** | **Action occurs within Alma.** |
|  |  |  | If suspended in IDM, this will not be sent to Library. Library does not care about the S status. | N/A | **Covered in Test 4.7.** |