



GEORGIAFIRST
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
A Project of the University System of Georgia

PeopleTools v8.52 Upgrade and User Acceptance Testing Overview

GeorgiaFIRST Team

October 15, 2013

WebEx Housekeeping

- Welcome to WebEx Event Center
- If you cannot hear audio through your computer speakers, please dial in to the conference line:
 - (646) 307-1300, access code 9759227
- Submit questions via the chat function
- Recording and slides will be available tomorrow

Agenda

- Foundations Upgrade Overview and Impact
- Campus-Delivered Reporting Tools
- Reporting Solution and Query Cleanup
- UAT Requirements
- UAT Process
- Campus UAT and Cutover Coordinators
- Cut Over Preview

Foundational Upgrade Overview

- Split upgrade into two projects
 - Foundational upgrade
 - Application upgrade
- Foundation upgrade consists of hardware, operating system, database, and PeopleTools.

Foundational Upgrade Overview

- Key drivers for Foundation upgrade towards meeting customer needs
 - Vendor maintenance
 - Technology advances
 - Enhance system performance monitoring
 - Reduction of Total Cost of Ownership (TCO)
 - Better reporting capabilities and stability
- On schedule to be completed in late fall to early winter

Workstation Configuration

- Most Users will only need the latest Browsers:
 - Chrome 13+
 - FireFox 7+
 - Internet Explorer 9
(There are some issues with IE-10)
 - Safari 5, 6

Campus-Delivered Reporting Tools

- Crystal Reports 9 Developer
- nVision Reports Developer
- SQR Developer
- Swiftview for Check Printing
- PSQUEST Access

The PeopleTools 2-tier Query Tool will no longer be provided. The web-based Query Tool will still be available.

Campus-Delivered Reporting Tools

- Requirements:
 - Windows 7 and the latest browsers
 - Windows XP & MAC OS are NOT supported
 - ORACLE Client 11G
 - Microsoft Excel 2007, 2010
- Installation instructions, files, supporting documentation will be made available later this week.

Password Controls

- Being changed to conform to audit and ITS requirements
- Password control changes:
 - Password History retention
 - Will be 8 (currently set to 3)
 - Password requirements
 - Will be 10 characters (currently 8)
 - Will require 2 numeric and one upper case

Password Controls

- Will be changed and tested in UAT
- ITS plans to implement in production with PT8.52 Upgrade
- Impact to users:
 - Forced change of password upon initial login following the upgrade
- Institutions need to communicate this change to all PeopleSoft users



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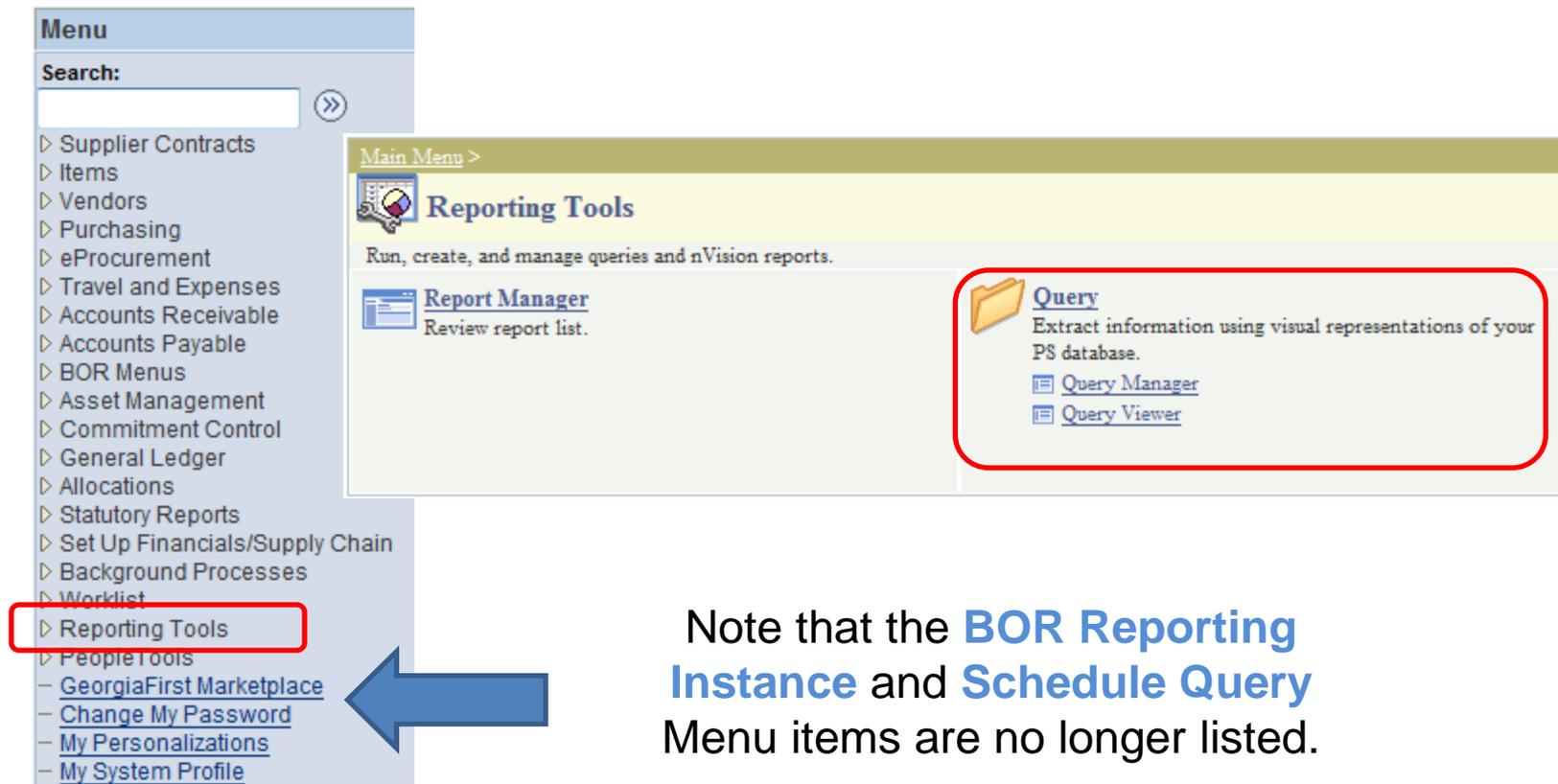
Reporting Solution Changes in Foundational Upgrade

Reporting Solution

- No more Reporting Database (F89RPT)
- All queries available in production
- Drivers for this change:
 - Users need for real time reporting data
 - Limitations of STREAMS tool
 - Limited number of records that can be synced from production (approximately 300)
 - Weekly refresh of F89RPT required (Sunday)
 - Extra maintenance related to application of releases

Reporting Solution

- Navigation change to Queries:



Menu

Search:

- ▷ Supplier Contracts
- ▷ Items
- ▷ Vendors
- ▷ Purchasing
- ▷ eProcurement
- ▷ Travel and Expenses
- ▷ Accounts Receivable
- ▷ Accounts Payable
- ▷ BOR Menus
- ▷ Asset Management
- ▷ Commitment Control
- ▷ General Ledger
- ▷ Allocations
- ▷ Statutory Reports
- ▷ Set Up Financials/Supply Chain
- ▷ Background Processes
- ▷ Worklist
- ▷ **Reporting Tools**
- ▷ PeopleTools
- [GeorgiaFirst Marketplace](#)
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)

Main Menu >

Reporting Tools

Run, create, and manage queries and nVision reports.

-  [Report Manager](#)
Review report list.
-  [Query](#)
Extract information using visual representations of your PS database.
 -  [Query Manager](#)
 -  [Query Viewer](#)

Note that the **BOR Reporting Instance** and **Schedule Query** Menu items are no longer listed.

Reporting Solution

- ITS will use database and application settings to minimize the potential impact to system performance.
- DBA monitoring tools will also be utilized.
- It is recommended that Institutions use F89PLAY database for mocking up/testing new queries.

Reporting Solution

- Queries that will be available in production
 - BOR Model delivered queries
 - Institutional queries from F89RPT meeting the following criteria:
 - In recommended naming convention (starts with first three digits of your Business Unit)
 - Has been run since May, 2012
 - Private queries created by inactive users will not be brought forward.

Query Cleanup

- Institutions should have completed initial round of campus query cleanup.
 - These will be included in the UAT database.
- Final round of query cleanup will need to be completed in late November (prior to upgrade).
 - ITS will provide new spreadsheets and instructions with deadline to be completed.

Query Cleanup

- A few users have private queries in production.
- These queries will get overwritten when we migrate the BOR and campus queries from the reporting database.
- ITS will contact institutions and provide a list within the next week.

Query Cleanup

- Query security access - ensure that you are not giving unnecessary roles
- Only **one** of the following roles need to be provided:
 - BOR_PT_QRY_PUBLIC
 - BOR_PT_QRY_PRIVATE
 - BOR_PT_QRY_VIEWER
- Contact Shelia Sloan with questions



User Acceptance Testing (UAT)

UAT Goals

- Exposure to newly upgraded environment
- High level validation of the data
- High level validation of key or critical business processes and integration points
- Participation and sign-off from every Georgia*FIRST* institution

UAT Overview

- UAT Testing Dates
 - Monday, October 28th – Friday, November 1st
- Scope of Testing
 - Core functionality
 - Integration (Banner, ADP, GFM, etc.)
 - Tools (Query, Security, nVision)
 - Other (data validation, PSQUEST)
 - Institutionally developed tools and reports

UAT Participants

- Names of testers for the following areas were requested from CAOs:
 - General Ledger
 - Security
 - Accounts Payable
 - ePro and Purchasing
 - Expenses (T&E)
 - Asset Management

UAT Participants

- Names of testers requested from SSC Communications listservs:
 - ADP Benefits Reconciliation
 - Common Remitter
 - Payroll to GL (*this area will require a GL person and most likely an HR/PR person*)
 - Budget Prep (*The set of testers for this area will be determined by the Budget Issues Committee*)

UAT: What to Expect from ITS

- Process for testing and remediation
- Test scenarios and instructions
- Any workstation installation instructions
- Communication methods (UAT email group and listserv)

UAT: What to Expect from Institutions

- Timely communication of issues to ITS as they are identified
- Testing completed within designated timeframe
- Return sign off on test results by end of day Monday, November 4th
- Involvement in remediation testing

UAT Issue Reporting

- Send any testing questions or issues to this email address:
 - PSFINUAT@usg.edu
 - When reporting issues, include module, task being tested, error message, contact information, etc.
 - ITS will monitor this email address to track issues.

UAT Issue Reporting

- ITS will communicate information on testing and issues to all UAT participants via a listserv – FIN-UAT-L@LISTSERV.UGA.EDU
- Issues identified will be remediated based on priority
- Remediation must be tested and signed off on by end of day Friday, November 8th

UAT Performance

- UAT is on different hardware than production.
 - Does not have the same capability as production hardware.
- ITS has a performance plan to conduct testing on the production hardware between 11/19 and 11/27.
- Report any performance issues during UAT
 - We will include these tasks in our performance testing.

Campus UAT & Cutover Coordinator

- **Campus UAT & Cutover Coordinator is usually the Chief Accounting Officer representative or their appointee**
- Responsible for testing coordination at their specific campus including:
 - ✓ Recruiting User Acceptance testers
 - ✓ Sending test scenario issues to ITS for resolution and analysis
 - ✓ Coordination retesting of previously reported issue
 - ✓ Sign-off that all scenarios have tested successfully at their campus

Campus UAT & Cutover Coordinator

- Cutover Responsibilities
 - ✓ Identify additional Technical and/or functional contacts if applicable
 - ✓ High-level validation including security, running of reports and queries (campus cutover checklist)
 - ✓ Sign-off that campus cutover checklist is complete

Campus UAT & Cutover Coordinator

- Communication Responsibilities
 - ✓ Communicate with campus users of PeopleSoft system downtime as a result of the cutover
 - ✓ Communicate with campus users when PeopleSoft system is available after cutover

Cut Over Preview

- When: one of the first two weekends in December
- Impact: some downtime, although the length is still being determined
- Work effort: some technical tasks and validation of data

Communications are forthcoming with specifics

Q & A

Please submit your questions via the chat function now.

Wrap Up

- Recording and slides made available tomorrow
- Thank you for participating!