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
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:

  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 GeorgiaFIRST institution
UAT Overview

• UAT Testing Dates
  – Monday, October 28\textsuperscript{th} – Friday, November 1\textsuperscript{st}

• 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 8\textsuperscript{th}
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!