



**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

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- 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

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- 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

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

# Foundational Upgrade Overview

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- 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

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- Most Users will only need the latest Browsers:
  - Chrome 13+
  - FireFox 7+
  - Internet Explorer 9  
(There are some issues with 11)
  - Safari 5, 6

# Campus-Delivered Reporting Tools

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- 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.





# Password Controls

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- 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)
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# Password Controls

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- 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

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- 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

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# Reporting Solution

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- 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.



# Query Cleanup

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- 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

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- 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

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- 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



# UAT Goals

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- 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

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- UAT Testing Dates
  - Monday, October 28<sup>th</sup> – Friday, November 1<sup>st</sup>
- 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

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- 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

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- Process for testing and remediation
- Test scenarios and instructions
- Any workstation installation instructions
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# UAT: What to Expect from Institutions

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- 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 4<sup>th</sup>
- Involvement in remediation testing

# UAT Issue Reporting

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- Send any testing questions or issues to this email address:
  - [PSFINUAT@usg.edu](mailto: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

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- ITS will communicate information on testing and issues to all UAT participants via a listserv – [FIN-UAT-L@LISTSERV.UGA.EDU](mailto: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<sup>th</sup>

# UAT Performance

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- 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

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- Campus UAT & Cutover Coordinator is usually the Chief Accounting Officer representative to the

# Campus UAT & Cutover Coordinator

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

# Campus UAT & Cutover Coordinator

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- Communication Responsibilities
  - 9 Communicate with campus users of PeopleSoft

# Cut Over Preview

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- 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

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Please submit your questions via the chat function now.

# Wrap Up

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