



PEOPLESOFT

HCM

eForms
UAT Kick-Off

April 24, 2017

AGENDA

1. UAT Orientation

- Purpose
- Process
- Schedule
- Logging Issues
- Workflow and Approvals
- UAT Support

2. Functionality Walk-through / Demo

3. Next Steps

PROJECT SCHEDULE

<u>Major Activity</u>	<u>Start</u>	<u>End</u>
eForms	December 16, 2016	June 23, 2017
System Test	December 16, 2016	March 31, 2017
HRS Business/Functional Test	April 3, 2017	April 18, 2017
User Acceptance Testing	April 3, 2017	May 8, 2017
Develop Training Materials	April 3, 2017	April 21, 2017
Deliver UAT Orientation/Training	April 24, 2017	April 24, 2017
Conduct UAT	April 24, 2017	May 12, 2017
Preparation/Deployment	May 13, 2017	May 22, 2017
Go-Live	May 23, 2017	May 23, 2017
Training	May 15, 2017	May 26, 2017
Deliver Overview Sessions	May 15, 2017	May 19, 2017
Host Drop-in Sessions	May 23, 2017	May 26, 2017
Warranty	May 23, 2017	June 23, 2017

We are here! →

PURPOSE OF UAT

- End user testing
- Test “real world” scenarios from business perspective
- Verify the functionality works as designed
 - *Don't try to break it - yet*
- Confirm business processes
- Gain experience prior to deployment
- Test training material

PROCESS

- Identify a coordinator for your Faculty/Department
- Identify and test business scenarios
- Use spreadsheet provided to track progress
- Focus on the scenarios that cover the majority of situations you would typically encounter (80/20 rule)
- Focus on critical functions first – “happy path”

TESTING GUIDELINES

- Follow instructions as given
- **Only test the scenarios as identified for each week; don't jump ahead**
- Project team will keep a running log of issues that you will be able to see
- Regular update meetings will be scheduled to discuss progress and any major issues
- **Expect that not everything will be 100%; you will encounter issues**

TESTING GUIDELINES

- Only test “typical” transactions at this point
- Do not try to process transactions in a way that you wouldn’t normally do in production **even if you see that the form will allow you to do something else**
- Assume all of the information you have is correct
- Use examples from actual PAFs you’ve sent for processing in the last few months
- **Don’t test research**; we will manage that separately due to the complexity of the set up

TESTING – WEEK 1

- Hire – Student, Academic, Support, POI
 - Present, Past and Future
 - Only use SIN **999999998** when testing
 - One-time payments – use lump sum only
 - Don't use Hire form to extend someone – process has changed since HCM Upgrade

TESTING – WEEK 2

- Job Change
 - Account change
 - Extension
- Do not submit forms for Reports to/Supervisor ID changes, one-time payments or ongoing payments - *for now*

TESTING – WEEK 3

- Status Change
 - Termination – resignation (initiated by employee)
 - Leave of Absence – maternity/paternity leave
 - Return from Leave
 - Retirement

PAYROLL PROCESSING

- Payroll has been confirmed to March 31, 2017 (semi-monthly and monthly)
- April monthly and semi-monthly pay calcs and confirms will be run during UAT

SCHEDULE

April / May 2017

Sunday	Monday	Tuesday	Wed.	Thursday	Friday	Saturday
23	24 UAT Starts BEGIN HIRE Pay Calc – Apr SM-1	25	26	27	28	29
30	1 Status Mtg BEGIN JOB CHANGE Pay Confirm – Apr SM-1	2 Pay Calc – Apr Monthly	3	4 Pay Confirm Apr Monthly	5 Pay Calc – Apr SM-2	6
7	8 Status Mtg BEGIN STATUS CHANGE Pay Calc – Apr SM-2	9	10	11 Pay Confirm – Apr SM-2	12 Final Validations Status Mtg UAT Ends	13

LOGGING ISSUES

- One person from each Faculty to coordinate on Faculty's behalf
- Email issues to TestHCM@ualberta.ca; **include UAT in the subject line**
- Project team will review, triage and log a ticket, if necessary
- One issue per email, where possible
- Provide as much detail as possible (see sample)

Note: Please use the following naming convention for the filename:
TypeofformEform ID (e.g. Hire100336)

LOGGING ISSUES

- Provide as much detail as possible
- Include screenshot
- Can send information in a Word document or directly in an email

Type of Form (Hire/Rehire, Job Change, Status Change): Hire
eForm ID: 100326
Employee ID: 1365245
Employee Record: 0
Employee Group: 187 – Casual Academic
Job Code: A0260
Originator Operator ID: AMA1
Approval Operator IDs (if applicable): AMS2 AMS3 ASA
Issue: Job Code look up should be restricted to A0260 only, not all Academic job codes
Recreation steps: <ol style="list-style-type: none"> 1. Entered a new Hire with an existing Campus ID no job record 2. Clicked on the Look Up Job Code – all Academic job codes are available – which should not be the case 3.
Additional Info/comments:

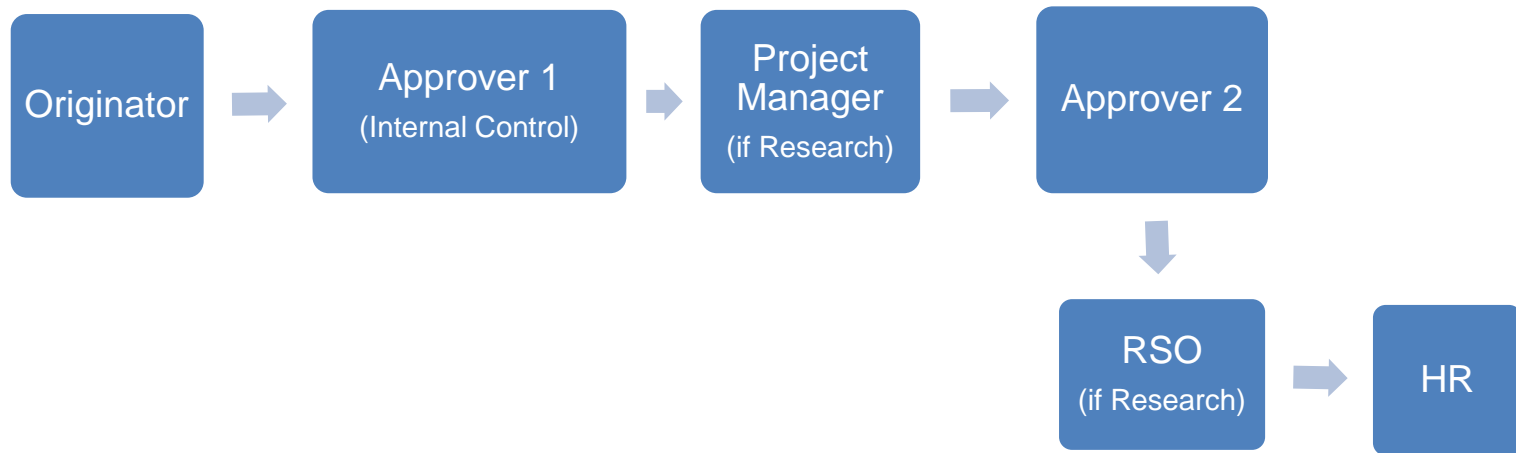
KNOWN ISSUES

- Hire – Additional Pay
- Hire – Out of Province updates incorrectly
- Menu names – the word 'eForm' repeats

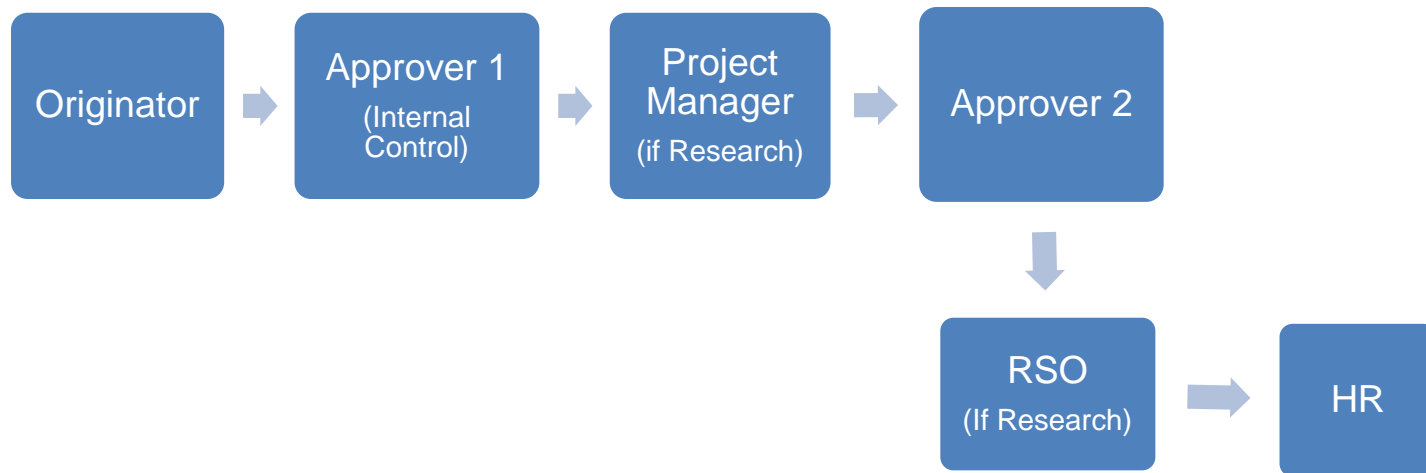
OTHER NOTES

- UAT reflects data as of November 14, 2016
 - Won't include new combo codes, etc.
- UAT data is scrambled
 - **Don't search by SIN or Name**
- Effective Date – ensure this is correct when entered; if you change it, all Job related fields will be blanked out.

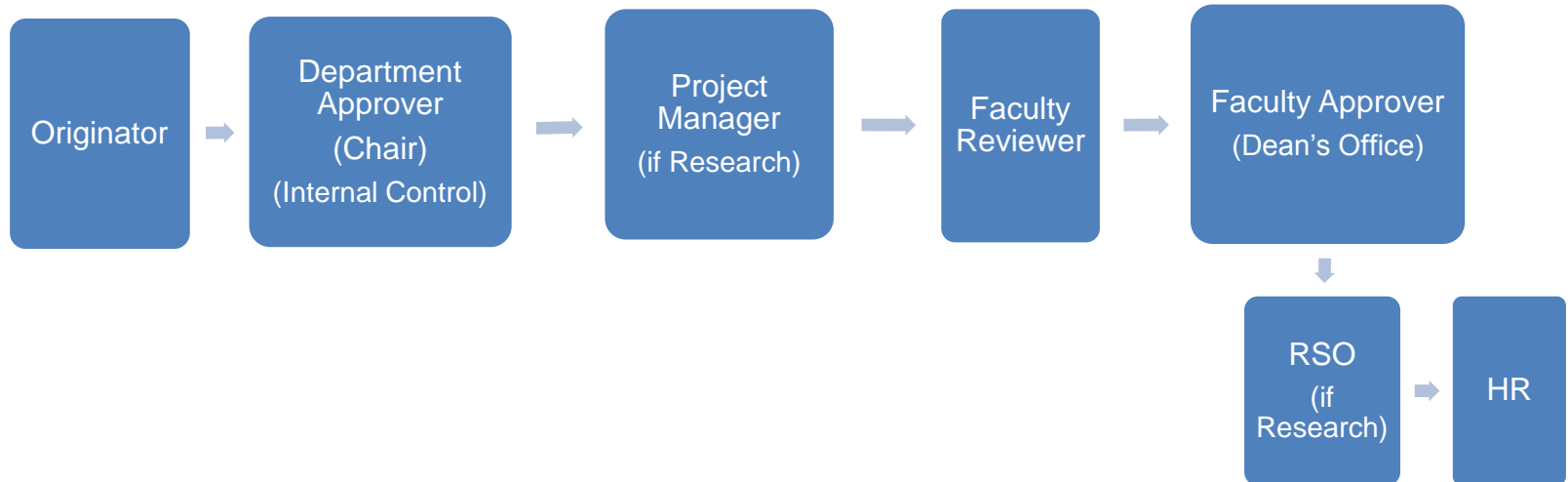
WORKFLOW & APPROVAL- Support



WORKFLOW & APPROVAL- Student



WORKFLOW & APPROVAL – Academic / POI



WORKFLOW AND APPROVALS

- Originator can't submit their own form
- Originator can't submit and give the final approval for an eForm. Must be at least one other approval.
- Approver can't approve an eForm related to their own Job record
- If a user has both Approver 1 and Approver 2 roles and has approved form at the first level, it will skip over the second (user won't need to approve form twice)

SECURITY ACCESS IN UAT

- Security in UAT should reflect what you have in production today
- If there are issues, please let us know
- Before you leave today, log in and check

SUPPORTS

- Training material will be made available throughout UAT (we appreciate your patience!)
- **University Terrace 2-47** will be available **Wednesday afternoons & Friday mornings** for testing and support
- eForms UAT site – <http://www.se2.ualberta.ca/eFormsUAT>

Demo

End

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NEXT STEPS

- Login - <https://www.devps.ualberta.ca/uahmuat/signon.html>
- Navigation
 - **Main Menu > UofA eForms WorkCenter**
- Check that you have access to what you should
- Run through initial tests **for Week 1**
- When you return to your office, confirm that you can access the UAT environment