

# PeopleSoft HCM 9.2 Upgrade

**Testing Plan Approach for Campus Involvement**

# Testing Plan Approach

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# PURPOSE OF TESTING

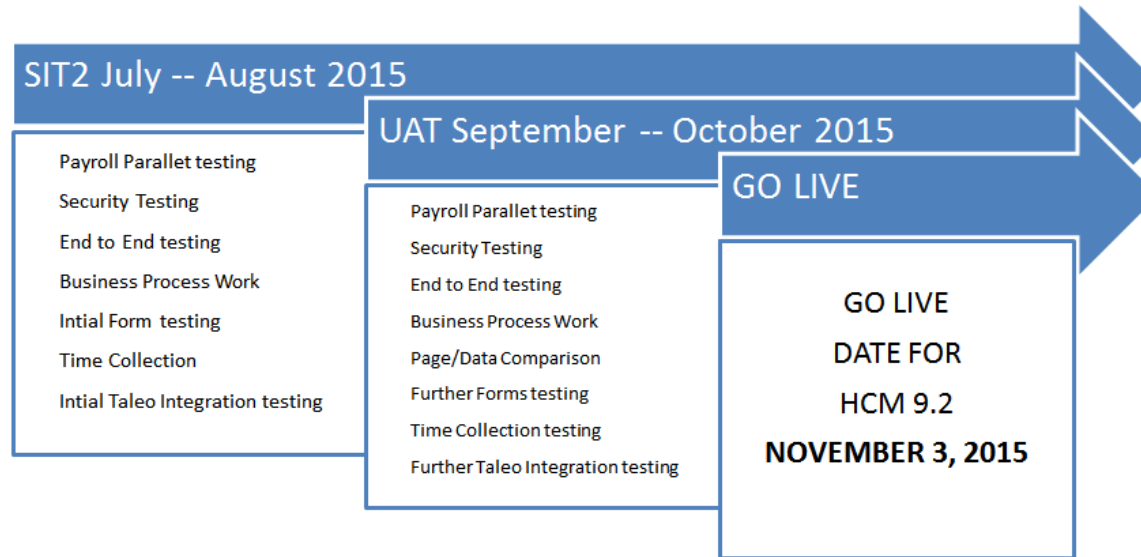
- Testing ensures that the system meets CU's needs (functional requirements).
- System Test is the time to find defects and correct them before go-live.
- There is no approach or method to guarantee a system completely free of defects.
- Following a System Test approach assists in reducing risks and ensuring a successful upgrade.

# TERMINOLOGY

- Functional Unit System Testing (**FUST**) – validates the unit testing and the configuration/development; tests the entire module or process; performs regression testing of fixes; works through configuration/development adjustments/changes required; validates data conversion
- System Integration Testing (**SIT**) – completed by SMEs and project team to ensure that the data flows through the modules as well as that data flows in/out of PeopleSoft
- Model Testing to Campus/ES team (**MTC**) – completed by our campus power users, either by site testing or demos for our campuses and our Employee Services counselors and production team. For acceptability & validates the end to end business process flows. This confirms whether our HCM 9.2 PeopleSoft system upgrade meets the requirements and business process for University of Colorado.
- User Acceptance Testing (**UAT**) – completed by the large user base to ensure processes work as needed
- Regression Testing (**RT**) – retesting fixes or changes that are applied to ensure that not only the original issue is resolved but that no new issues arise

# HCM 9.2 TESTING STAGES

- **System Integration Testing (SIT2) – July 2015 – August 2015**  
This phase includes testing of all migrated development and new configuration. This testing will be done in our SP2, TST & PAY environments
- **Model Testing to Campus (MTC) Campus Testing Involvement starts in July 2015**  
This phase enables end-users testing an opportunity to log into the system, perform their typical tasks on the new system, verify their security access, validate their procedures and get comfortable with the new system.
- **User Acceptance testing (UAT) Campus Testing continues September – October 2015**  
This phase of testing is where the process are tested in the system for acceptability & validates the end to end business process flows. Such testing will be executed by our campus power users, either by site testing or demos for our campuses. This confirms whether our HCM 9.2 PeopleSoft system upgrade meets the requirements and business process for University of Colorado.



# Test Phase Details & Timelines

Each phase may include several types of testing.

## ➤ **Unit Testing (UT) – January 2015 – July 2015**

- Initial testing phase once development is completed to ensure each new change is behaving as expected.
- Testing will be completed in SP3 environment by our developers in University Information Systems (UIS).
- Once development is done in SP3, it will be approved & migrated into SP2.

## ➤ **Functional Unit System Testing (FUST) – January 2015 – May 2015**

- Phase includes validations of data conversion, functional testing, initial security set up, and some end-to-end testing.
- This testing phase validates that the system performs as specified. Functional requirements are defined on how they system should perform. This testing will be done in SP2 environment.
- Testing of development moved to SP2
- All unexpected results will be documented by the tester using Test Issues Log (TIL) and logged in our SharePoint Elevate System Issue Tracking FIN-HCM log

# Test Phase Details & Timelines

## ➤ **System Integration Testing (SIT) – May 2015 – August 2015**

- Beginning May 2015, ES will receive the upgraded TST environment to begin configuration and setup for the System Integration test phase.
- Where available, Data Migration scripts will be run to move data from SP2.
- The SIT Phase includes testing data conversion, new configuration and development.
- Testing will include payroll parallel testing, end to end testing and batch processing.
- Testing will be done in our SP2, TST & PAY environments.
- Testers will include Functional leads
- Testing will incorporate Employee Services and Employee Services production staff involvement to ensure all areas are tested.

## ➤ **SITI – June 2015 – July 15, 2015**

### **Parallel Testing (PT) – June – July 15, 2015**

This phase validates all processes work together to support the business functions to ensure successful payroll runs.

**End to End Testing** – for functionality that is not included in the payroll parallel test

### **Batch Processing (BP)**

This phase validates all external interfaces, which are files that are received or sent, outside of CU. This includes post payroll testing.

### **Integration Testing**

Test integrations internal integrations between HCM and other CU applications.

# Test Phase Details & Timelines

## ➤ **SIT2 – July 16, 2015 – August 2015**

- **Parallel Testing (PT) – July 2015 – August 31, 2015**

This phase will validate all time collection customization processes work together to support the business functions to ensure successful payroll runs.

- This phase validates all processes work together to support the business functions to ensure successful payroll runs. This will be a complete end to end testing of all new implementations and upgrade.

- **Model Testing to Campus (MTC)**

This phase enables end-users testing an opportunity to log into the system, perform their typical tasks on the new system, verify their security access, validate their procedures and get comfortable with the new system.

Any additional changes that need migrated back to development will require additional levels of sign-offs before new development will be done and have to go through SIT testing again



# Test Phase Details & Timelines

## ➤ **User Acceptance Testing (UAT) – September 2015 – October 15, 2015**

UAT is the testing process where the system is tested for acceptability & validates the end to end business process flows. Such testing will be executed by Employee Services and our campus power users, either by site testing or demos for our campuses. This confirms whether our HCM 9.2 PeopleSoft system upgrade meets the requirements and business process for University of Colorado.

- **Parallel Testing (PT)**

This phase will validate time collection customization processes work together to support the business functions to ensure successful payroll run, workflow processing, contract pay and open enrollment validations.

- **Model Testing to Campus (MTC)**

This phase enables end-users testing an opportunity to log into the system, perform their typical tasks on the new system, verify their security access, validate their procedures and get comfortable with the new system. Any additional changes that need migrated back to development will require additional levels of sign-offs before new development will be done and have to go through testing again

# Testing Types Descriptions

Test Type	Focus	System Test Phase
Security Testing	Eliminates security accessibility errors.	SIT2 / MTC / PT
End-to-End Testing	Validate a transaction through the entire system, not just at entry and exit points. This means a transaction is followed throughout the various modules it may touch. Must be coordinated.	SIT2 / MTC / PT
Business Processes Testing	To allowing non-technical subject matter experts to evaluate business processes and to give feedback on current processes.	SIT2 / MTC

# Testing Types Descriptions

Test Type	Focus	System Test Phase
Forms Testing	Ensure that our forms will capture the data correctly, along with testing to ensure that all data is flowing to the correct place.	SIT2 / MTC / PT
Time Collection Testing	Ensure new time collection process is working correctly	SIT2 / MTC / PT
Taleo Integration Testing	Ensure information is flowing correctly to and from Taleo to PeopleSoft HCM 9.2	SIT2 / MTC
Regression Testing	Ensures that the application doesn't negatively impact previously migrated objects/modules. Re-test the application to ensure that a fix did not cause other functionality to break that was previously working.	SIT2 / MTC/ PT

# Functional Areas – End to End Testing

Area	Employee Services Responsible Project Team Member	Campus Responsible Party	SIT2	UAT
Taleo/HCM	Carolyn Proctor		X	X
Security	Jennifer Bosma		X	X
Self Service	Jennifer Bosma		X	X
Profile Management (person)	Cindy Corwin/ Carolyn Proctor		X	X
Position Management (non-person)	Cindy Corwin		X	X
Personal Data	Jennifer Bosma		X	X
Job Data	Jennifer Bosma		X	X
Time Collection	Lisa Affleck		X	X
Payroll Processes	Angelica Throckmorton		X	X
Contract Pay	Angelica Throckmorton		X	X

# Functional Areas – End to End Testing

Area	Employee Services Responsible Project Team Member	Campus Responsible Party	SIT2	UAT
Leave Accrual	Angelica Throckmorton		X	X
Benefits/eBenefits	Tanya Graham/ Nancy Sicalides-Tucker		X	X
ePerformance	Cindy Corwin/ Carolyn Proctor		X	X
Faculty Events	Cindy Corwin		X	X
HR/GL	Lisa Affleck/Lezlie Lane		X	X
Reports/Queries	All		X	X
Work Centers	Josh Grudle		X	X
Forms testing	Josh Grudle, Lisa Affleck		X	X
Campus Solutions Integrations	Lisa Affleck, Angelica, Throckmorton, Lezlie Lane		X	X
CIW	Lisa Affleck, Lezlie Lane		X	X

# Testing Approach

The general methodology/approach for 9.2 HCM PeopleSoft Upgrade System Testing at CU will involve the following steps:

- This upgrade will test all the critical business functions.
- Plan will include conditions for testing user's security access.
- Test conditions are grouped by business process.
- End to End Testing by area
- Business Process flow by area
- Form testing by area
- Time Collection Testing
- Taleo Integration testing

# Testing Steps and Issue Reporting

- Once Responsible parties have been identified the Testing Coordinator will provide worksheets to them along with instruction on how to use the worksheets and document their results for their testing area.
- Execute the test condition.
- Check the output against the expected results.
- Evaluate and document any unexpected results that the tester finds on worksheets
- Work with the Employee Service project upgrade team members to make sure that any required corrections are migrated and re-tested.
- Review your results with the ES team and obtain Acknowledgment of System Test results where appropriate (i.e. new functionality).