OneUSG
User Acceptance Testing Kick-Off
September 11th, 2018
User Acceptance Testing – Kickoff
Holley Schramski

Welcome
User Acceptance Testing Workshop Agenda

- Welcome
- How we got here...
- Progress to Date...
- User Acceptance Testing Structure
  - Definition / Objective
  - Structure
  - How it’s Conducted
  - Timeline
- Recap / Next Steps
User Acceptance Testing – Kickoff
Craig Golden

How we got here....
How we got here...

A solution is part of the University System of Georgia’s OneUSG Connect project to have all USG institutions using the same HR/Payroll system and standard business processes

- Part of a broader USG initiative to develop and implement a consistent approach to policies, procedures and technology solutions that benefit the University System as a whole.
- Supports the Chancellor’s imperative of accountability, efficiency and innovation.
- Will bring all institutions onto one technology solution to manage human resource activities, benefits, and compensation.
### How we got here...

<table>
<thead>
<tr>
<th>July 2017 (Cohort 1)</th>
<th>January 2018 (Cohort 2)</th>
<th>April 2018 (Cohort 3)</th>
<th>January 2019 (Cohort 4)</th>
<th>July 2019 (Cohort 5)</th>
<th>January 2020 (Cohort 6)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employees (Approx.)</strong></td>
<td><strong>Benefits</strong> 62,000</td>
<td><strong>Payroll</strong> 9,674</td>
<td><strong>Payroll</strong> 11,040</td>
<td><strong>Payroll</strong> 37,828</td>
<td><strong>Payroll</strong> 21,034</td>
</tr>
<tr>
<td><strong>Payroll Total: 101,783</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Core Build Complete</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
OneUSG Connect Core

- OneSource Financials Integration
- UGA Data Warehouse
- Time Capture
- Global Payroll
- Part Time Faculty
- Hyperion Budgeting
- Historical Data
- Onboard
- Applicant Tracking
- Effort Reporting
- Tenure and Promotion
- Perform Mgmt
- Vet Med
- Non Resident Alien
- College of Ag
- Affirmative Action

How we got here...

Shared R1 Requirements

R1 Specific Requirements
How we got here...

- How is UGA Different (R1 Specific Requirements)?
  - Veterinary Medicine (24 x 7)
  - College of Agriculture
  - Decentralized Initiators and Approvers
  - Applicant Tracking / PeopleAdmin
  - Multiple Datasources for Conversion (including legacy Mainframe)
  - Key Integrations
    - OneSource Financials
    - Data Warehouse
    - Hyperion Budgeting
    - Identity Management
    - Elements
How we got here...

- **Project Challenges**
  - **Size**
    - 36% Increase in Employees Administered through OneUSG
    - Some Colleges and Units at UGA larger than majority of institutions
  - PeopleSoft Terminology
  - Shared Services Support Model
  - 135 Time Clocks
  - Blended Project Team
  - Merit Increase @ Go-Live
  - 3rd Party Vendor Integrations
    - ADP – Tax and Garnishments
    - Alight – Health and Wellness Benefits
    - Wells Fargo – Banking
How we got here...

• What we have we learned from Prior Cohorts?
  – Supplemental Staffing and Backfill Required
  – **Aggressive** Institution Specific Testing Required
  – Communicate
    • All methods and mediums
  – Train and Retrain
    • Explain the Why
  – Performance and Load Test
User Acceptance Testing – Kickoff
Diane Kirkwood

Progress to Date
User Acceptance Testing - Kickoff

User Acceptance Testing
Definition / Objective
• **User Acceptance Testing Definition**
  – is a phase of *software* development in which the *software* is tested in the "real world" by the intended audience

• **Objective**
  – ensure UGA’s requirements are satisfied by the application
  – driven by business owners
  – confirm roles and responsibilities outlined during the business process design
Unit Testing (Conducted by Developer)

System / Integration Testing (Conducted by UGA Functional Analyst)

User Acceptance Testing (Conducted by UGA End User)

Testing Lifecycle
• UAT is not Training - However....
  – Some testing scenarios may be demonstrated ahead of conducting the test
  – Facilitators will lead the testing
  – Hands on support will be provided in the testing facility

OneUSG is **Transformational** for the University of Georgia - All functional areas have a vested interest in supporting this effort
• PeopleSoft Modules
  – Workforce Administration
  – Time and Labor
  – Absence Management
  – Commitment Accounting
  – Faculty Events
  – Benefits Administration
  – Payroll
  – General Ledger
  – Commitment Control

• Integrations
  – ADP
  – Wells Fargo
  – Alight
  – Elements
  – PeopleAdmin
  – Identity Management
  – Data Warehouse

• Additional Scope
  – Kaba Time Clocks
  – Vet Med
  – College of Agriculture
  – Savannah River
  – Skidaway
  – Athletics
  – Benefits Reconciliation
  – Common Remitter
  – Shared Services Call Center
  – Centralized Security
• Anticipated Outcomes....
  – Quality Assurance
    • Identification Bugs, Security Issues and/or Missed Requirements
  – Knowledge Transfer
  – Validation of Business Processes
  – Confirmation of Security Assignments
  – Identification of Training and Communication Opportunities
User Acceptance Testing – Kickoff
Functional Team

User Acceptance Testing Structure
User Acceptance Testing Structure

- Central Office Testing
  - Bi-Weekly Payroll
  - Monthly Payroll
  - Off-Cycle Payroll

- Distributed (College and Unit Testing)
  - Employee Self Service
  - Manager Self Service

- Focused Testing
  - Faculty Events
  - Athletics
  - College of Agriculture
    - County Extension Offices
  - Identity Management
  - Time and Absence / Timeclocks
    - Veterinary Medicine
    - Recreation Sports
    - Auxiliary
    - FMD
    - Other
  - End to End
  - Commitment Accounting
• Day 1: Human Resources / Commitment Accounting
  – Create Positions/ Fund and Hire
• Day 2: Benefits, Payroll, Time and Absence
  – Input Deductions
  – Input Savings and Retirement
  – Input Time and Absence
• Day 3: Payroll
  – Calculate and Confirm Payroll
  – Reconcile Earnings, Taxes and Withholdings
• Day 4: Commitment Accounting
  – Run CA Validation Queries & Processes
• Day 5: Commitment Accounting
  – Reconcile Accounting Entries to Payroll
  – Money Movement / Fund Payroll
  – Encumbrance Calculation
Create Position in PeopleAdmin

Hire Applicant in PeopleAdmin

Interface Positions and Employees into OneUSG

Run Processes to...
  Provision Users
  Grant Row Level
  Enroll in Time and Absence
  Load Faculty Events

Send HR Information to Alight (Benefits)

Enroll in Benefits and Retirement

Enter Funding for the New Position

Enter Time

Enter Absences

Run Time and Absence Batch Processes

Receive Payroll Deductions from Alight (Benefits)

Load Time into Payroll

Calculate and Confirm the Payroll

Interface Payroll ADP – Tax
  ADP – Garnishment
  Wells Fargo - Banking

Create Accounting Entries and Interface to OneSource

Post the Accounting Entries in OneSource

Calculate Retirement and Savings (Common Remitter)

Interface to Retirement Providers

Create Accounting Entries for Retirement and Interface to OneSource

Post the Accounting Entries in OneSource
User Acceptance Testing
Distributed (College and Unit)

• Employee Self Service
  – Update Personal Information
    • Name
    • Address
    • Phone
    • Email
    • Emergency Contact
  – View Paycheck
  – Paycheck Modeler
  – Enter Leave
  – Enter Time
  – Enter Degrees
  – Punch Out to Alight
  – Punch Out to Elements

• Manager Self Service
  – UGA Jobs
    • Position and Personnel Administration
  – OneUSG
    • Terminate Employee
    • Supplemental Pay
    • Adjust Leave Balances
    • Change Time and Absence Approver
    • Add / Change Funding
    • View Employee Personal Information
    • Retire Employee
    • Ad Hoc Salary Change
    • View Compensation History
    • Team Profiles
Initiator – System Manager (BOR role)

- Submits personnel requests
- Uses Navigator
- Row level security

Department Approver – specific to each department as to whether they have 1-3 levels of approvals

1. list of specific employee
2. Only uses tiles
3. list of specific employee (may not exist today)
4. Only uses tiles

Reports To Unit Manager

-approves time and absence (no MSS transaction)
- Tiles

Time and Absence approver (Back Up)

Central Approvals – HR, Benefits, T&L, Absence, CA, Security

-Uses Approval Tiles
**User Acceptance Testing**

**Distributed (College and Unit)**

- **ESS Transactions** go straight to Central
  - Name Change and Degree

- **Initiator**
  - Only for Initiator, one up/down and lateral

- **1** - At Save

- **2**

- **3**

- **4**

- **5** - Uses Approval Tiles

- Must be a manager (unit or system) or ad hoc app role, in or out of the department
  - Approvers can assign one prior to approval
  - Initiator can after they submit
  - Absence flow DOES NOT FOLLOW, goes straight to ‘Reports to’ or Backup
Focused Testing

• Faculty Events
  – Enter Rank and Tenure
  – Prior Years Experience
  – Integration with PeopleAdmin
    • New Fields Required for Integration with Managed Faculty Events
  – Administrative Posts
  – Self Service
  – Degree Submission and Approval
  – Contract Print
  – Adjuncts
  – Emeritus
Athletics
  - Multi Job
  - Leave Administration
  - Terminated with Pay
• College of Agriculture (County Extension)
  – Multi Job
  – Annual Base Benefit Rate
  – Retirement Calculation
  – Common Remitter
  – Billing
Focused Testing

• Identity Management
  – Workforce Administration
    • Hire
    • Term
    • Other Job Actions
  – Provision / Deprovision
  – Interface
    • 810 ID
    • Email Addresses
Focused Testing

- Time Entry
  - Punch Time
  - Exception Time
  - Webclock
  - Time Clock
  - Absence Request
  - Absence Adjustment
  - Rate Differentials
  - Shift Differentials
  - Multi-Job
  - Tips

- Time Approval
  - Dynamic Groups
    - Can you view your employees
  - Approve Time
  - Approve Leave
Focused Testing

- End to End
  - Hire in PeopleAdmin
  - Integrate with OneUSG
  - Central Office Performs Hire
  - Messaging to OneSource Financials for HR Data Changes
  - Interface to Faculty Events
  - Tenure Calc
  - Provision in IDM
  - Update Personal Information in OneUSG
Focused Testing

• Commitment Accounting
  – Budget Retro
  – Direct Retro
  – Encumbrance Processing
Focused Testing

• Additional Testing....
  – Benefits Reconciliation
  – Common Remitter and Money Movement
  – Call Center – Role Playing
  – Service Desk and Case Management
User Acceptance Testing – Kickoff
Melissa Prigge and Craig Golden

User Acceptance Testing
How It’s Conducted
How It’s Conducted
Roles and Responsibilities

- **UGA Functional Leads and SCI Counterparts:**
  - They answer questions specific to what your testing
  - Help in identifying personal defects
  - Guide you through your scripts

- **USG Security Staff**
  - Ensure you are able to log-in
  - Address Role, Workflow and Row (Department) Security
    - Sheila Sloan, Tony Taylor, Stephan Hutchings, Stephanie Marshall, Lillian Lukyamuzi

- **Technical Support**
  - Defect Remediation

- **Test Leads**
  - Coordinate Testing, Prepare Scripts and Datasheets
    - Melissa Prigge/ Pat Holden

- **Shared Services Staff**
  - Run Batch Processes
  - Process Payrolls
  - Create Accounting Entries
  - Interface with ADP, Wells Fargo, Alight and Retirement Providers
How it’s Conducted Colleges and Units

- AUX
- FMD
- Environmental Design
- Athletics
- CAES
- EITS
- Family and Consumer Sciences
- Ecology
- Franklin

- Student Affairs
- Public Service & Outreach
- Medical Partnership
- Vet College
- Pharmacy
- SPIA
- Terry
- Business Services
- Libraries
How It’s Conducted

• User Acceptance Test Components
  – Test Scripts
    • Print Outs
    • Smartsheet
  – Data Sheets
    • Print Outs
  – Defects
    • Smartsheet
  – Metrics
    • Based on Test Conditions in Smartsheet
How It’s Conducted

- **Test Script** (What to Test)
- **Data Sheet** (What to Enter)
- **Demonstrate Test** (Project Team)
- **Conduct Test** (Testing Team)
- **Log Defect and Assign to Melissa Prigge** (Testing Team)
- **Fix Defect and Reassign to Tester to Retest**
- **Mark Test Condition Passed** (Testing Team)
- **Complete**

**Pass or Fail**
## How It’s Conducted

- **Components** – Test Script

### HCM Testing Matrix

<table>
<thead>
<tr>
<th>Test User</th>
<th>Assigned To</th>
<th>Testing Description</th>
<th>Assigned To Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Initiator</td>
<td>1.1.0-Request Security Change - As an Initiator, using the Navigator &gt; Manager Self Service Menu</td>
<td>Julie Burt</td>
</tr>
<tr>
<td>001</td>
<td>Initiator</td>
<td>1.1.2-As an Initiator, route the Security Change Request request to an Ad Hoc Reviewer</td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>Ad Hoc Reviewer</td>
<td>1.2-Review Security Change - As an Ad Hoc Reviewer, using MSS FLUID Tile &gt; Approvals</td>
<td>Lindsey Sessions</td>
</tr>
<tr>
<td>001</td>
<td>LVL1-3 Department Approver</td>
<td>2.3-Approve Security Change - As a LVL1-3 Department Approver, using MSS FLUID Tile &gt; Approvals</td>
<td>Katherine Hines</td>
</tr>
<tr>
<td>001</td>
<td>LVL4 Central Approver</td>
<td>2.3-Approve Security Change - As a LVL4 Central Approver, using MSS FLUID Tile &gt; Approvals</td>
<td>Denver Porterfield</td>
</tr>
<tr>
<td>001</td>
<td>LVL5 Central Approver</td>
<td>2.5-Approve Security Change - As a LVL5 Central Approver, using MSS FLUID Tile &gt; Approvals</td>
<td>Dan Baker</td>
</tr>
</tbody>
</table>
• Components – Data Sheet

University of Georgia
Leave Adjustment

Employee
Determined by Initiator

Initiator
Julie Burt

Submits Transaction Through MSS

Kathy Hines
Level 1 Approver

Baileigh Barnes
Leave Administrator
Central Office
What is a Defect?
- Your credentials didn't allow access
- You can't access a screen or perform the scripted transaction
- You get an error message

Log Defects in Smartsheet
- Best Practices for Defect Management Include Capturing....
  - Navigation
  - Key Data (Employee, Position, Check #, etc)
  - If Process Related – Process Instance
  - Reports (if applicable)
  - User ID Performing the Task
  - Attach Screenshots and Reports to Defect
  - Browser used
Defect Summary Statement
Please provide a short description of the defect or issue.

Additional documentation can be attached below in "File Attachments".

Test Case Number
FOR DEFECTS IDENTIFIED WHILE EXECUTING THE UAT TEST SCRIPTS: Enter
the test case from the test script, such as: UAT-00541-1737

FOR ALL OTHER DEFECTS: Leave blank. No entry is required.

Added By

Assigned To

Priority

Due Date

Details/Additional Comments
Brief comments can be provided here. Discussion topics and charts can be
attached to the defect in SmartSheet.

File Attachments

Defect Status
0) Pending Assignment

Modules

Send me a copy of my response

Submit

View Defect Log
<table>
<thead>
<tr>
<th>Test Cycle</th>
<th>Status</th>
<th>Count of Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ST01 - Conversion &amp; Payroll Calc</td>
<td>1. Not Started</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td>254</td>
</tr>
<tr>
<td></td>
<td>4. Failed - Defect Logged</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>262</td>
</tr>
<tr>
<td>ST02 - Baseline Transactions</td>
<td>1. Not Started</td>
<td>586</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td>59</td>
</tr>
<tr>
<td></td>
<td>4. Failed - Defect Logged</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>656</td>
</tr>
<tr>
<td>ST03 - Commitment Acctg &amp; Financials</td>
<td>1. Not Started</td>
<td>132</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>133</td>
</tr>
<tr>
<td>ST04 - Advanced Transactions</td>
<td>1. Not Started</td>
<td>426</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>426</td>
</tr>
<tr>
<td>ST05 - Self Service &amp; Security</td>
<td>1. Not Started</td>
<td>494</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>494</td>
</tr>
<tr>
<td>ST06 - 3rd Party &amp; Integration</td>
<td>1. Not Started</td>
<td>87</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>87</td>
</tr>
<tr>
<td>ST07 - End to End</td>
<td>1. Not Started</td>
<td>76</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>76</td>
</tr>
<tr>
<td>ST08 - Period End Processing</td>
<td>1. Not Started</td>
<td>38</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>38</td>
</tr>
<tr>
<td>ST10 - Pending Development</td>
<td>1. Not Started</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>2. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Passed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>21</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td></td>
<td><strong>1864</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>12</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>314</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>3</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Grand Total</strong></td>
<td><strong>2193</strong></td>
</tr>
</tbody>
</table>
User Acceptance Testing – Kickoff
Melissa Prigge

User Acceptance Testing Timeline
• Logistics Discussion
  – Location: Print Services
  – Begin Time: 9:00
  – Sending of Calendar Invites
  – Parking
    • (Click on Map)
Next Steps / Recap

User Acceptance Testing – Kickoff
Diane Kirkwood
OneUSG Connect

Wrap Up / Open Forum
TRS Billing/Common Remittance

- Ag will have access to table in HCM
- Common Remitter Practitioner (specific for College of AG) Role/Custom
- Adjustments for prior period (line on bill)
- Finance pulls from the history table

HCM Calculation
College of Ag Work Table
(Add/Del/Adj)

File written to history table

OneSource - billing back to County