PAYROLL IMPROVEMENT PROJECT

Agency Testing and Training Summary and Instructions

BACKGROUND

The Office of the State Comptroller (OSC) is upgrading the New York State Payroll system (PayServ) to PeopleSoft version 9.2. This upgrade will bring PayServ to the latest release of PeopleSoft. As a result of this upgrade numerous changes are being made to both the functionality and the code that runs PayServ.

OSC Payroll has performed a series of testing cycles that included unit testing, batch testing, and parallel testing. The final phase of internal OSC testing, User Acceptance Testing (UAT), is currently underway at OSC. During UAT, OSC Payroll staff are ensuring the system is performing as expected and payroll can be processed accurately.

Agency Testing and Training will conclude the testing effort for the project. As discussed in issued Payroll Improvement Bulletins, the PUG meetings, payroll newsletters and with Agency Testing Coordinators, Agencies will test the system over a two week period beginning December 7, 2020. Agency Testing and Training will also be an opportunity for users to complete self-guided training using job aid materials provided by OSC.

OBJECTIVES

Agency Testing and Training is intended to:

- Familiarize users of PayServ with the upgraded system
- Confirm that users can access the appropriate panels in the system to perform daily activities
- Verify the system is performing as expected
- Afford users the opportunity to validate internal business processes and update procedures and other documentation
- Allow time for PS Queries to be updated and tested

Agency Testing and Training is not:

- An extensive system test (extensive testing has been performed by OSC)
- An opportunity to request changes to requirements or functionality

EXPECTATIONS

Each agency has a designated Agency Testing Coordinator (ATC) who is expected to designate staff who will test the system. These testers will confirm system access, perform specific risk-based tests and scenarios, and test payroll processes they determine to be necessary, including running any PS Queries marked for conversion. Testers will participate in this testing and training period from 12/7/20 – 12/18/20, and will be available to test scenarios based on the modified schedule provided. Should testers encounter any impediment in performing the tests, they will report the issue according to the instructions below.

OSC will make a test environment available from 8 AM to 4 PM each day during the testing period. Any changes will be communicated through the ATCs. Security will be in place for testers in order to allow them to complete testing of both PayServ and PS Query as necessary. Renamed PS Queries will be available in the test environment. All PayServ users will have access to the test environment. The system will remain available until close of business on December 18, 2020.

Job aids will be provided for areas of significant change. Payroll staff will be available to assist with any questions or errors encountered, and will work with testers (information below) to resolve issues as they are reported.

Issues reported by agency testers will be responded to within one business day and resolved as soon as it is possible.

INFORMATION FOR TESTERS:

1. Testing Period is 12/7 – 12/18.
2. You should perform all tasks and reviews listed in the Agency Testing and Training schedule, as well as any specific scenarios assigned by your ATC. Update your ATC on your progress at least daily.
   You must complete the transactions and scenarios assigned to you. OSC payroll will work through the entire cycle for both an Institution Cycle and an Admin Cycle.
   For tasks that require OSC to participate, OSC will perform its steps in the task according to the schedule.
   Wherever possible, testers should enter "Agency Test" in the comments on their transactions.
3. Log into the test environment of PayServ via eGov. There will be a link called "**PS Query 92 Upgrade**."
4. Any errors or issues encountered should be reported according to the information below.

CYCLES AND DATES

The first two days of testing are spent on general tasks, mostly familiarization with the new system and security/access confirmations. All testers should perform these tasks, regardless of which cycle they are testing. After that, the remaining time will be split between two cycles, with four days for each cycle. The check dates and cycle times are:

12/7 – 12/8 – system validation

12/9 – 12/14 – Institution check date 9/10/20

12/15 – 12/18 – Admin check date 9/16/20

TESTING INFORMATION

To test 9.2, you should log in via eGov using your regular credentials. Once you log in to eGov, you will see a "**PS Query 92 Upgrade**" link (in addition to PayServ, PS Query, etc.). This is the environment where both PayServ and PS Query testing will occur.

The PS Query 92 Upgrade Bulletin Board has buttons that link to several pieces of information which may assist you in completing Agency Testing and Training:

- Testing Schedule – a high-level list of all items that must be completed and the dates when they must be completed

- Testing Summary – this document
- Testing Job Aids – information and instructions for specific tasks that are changing in v 9.2
- Payroll Improvement Project bulletins – all bulletins related to the project

WHEN THERE'S A PROBLEM

If you experience any difficulties, including access issues, or you are unable to complete a test due to an error, send an email:

1. **To** payrollimprovementproject@osc.ny.gov
2. **Subject** "9.2 Error – " and a short description
3. **CC** your ATC on the email
4. **Body** should include the following:
   a. What task/scenario you were attempting
   b. What step you were at when the error occurred
   c. When you encountered the error (date/time)
   d. A screen shot if possible of the error
   e. What specific outcome you expected
   f. What outcome you encountered
   g. Identifying information (e.g., EMPLID) if possible
   h. Whether the error stops you from completing a transaction or search
   i. Whether the errors makes completing other tests impossible
   j. Any additional information you think would be helpful

The more information you provide, the easier it will be to resolve the issue. If someone reports an error to you, make sure they or you follow the same steps; all issues will be tracked and need to be reported through the same channel. **If an error is reported outside this process, it may not be resolved.**