



Notes from District Preview Sessions

Overview

Education Business Systems (EBS) offered two **PeopleSoft Hands-On Software Upgrade Preview Sessions** for Districts on Friday, April 20, 2018 at SDCOE in Learning Lab 3. The HCM session was from 9:00-11:00 am. Finance was from 1:00-3:00 pm.

The EBS team showed the participants the highlights of what's new or different as a result of the upgrade, provided time for them to work in a test environment (SDHU/SDFU) to perform "real life" tasks, then debriefed to discuss what the users experienced (what they liked, any errors/issues they encountered, their takeaways, and their questions).

30 PeopleSoft users from 16 organizations participated (the # in parentheses is the # of participants): Borrego Springs (1), Cajon Valley (1), Carlsbad (1), Coronado (1), Escondido Elementary (1), Escondido High (2), Grossmont (2), Julian Elementary (1), La Mesa-Spring Valley (4), Lemon Grove (2), Poway (4), Ramona (1), San Diego County Office of Education (4), San Dieguito (1), San Marcos (3), and Solana Beach Elementary (1).

Summary: Participants' Takeaways

HCM users left the session stating that the upgrade feels seamless, that they do not need to worry. They stated that they are glad to have participated in the session. They said that they would share information about their experience with their colleagues. HCM users enjoyed learning Screencastomatic as a tool to create videos that they can use for cross-training.

Finance users stated that they did not notice any major changes and feel like the upgrade will not disrupt their work. They are glad to have participated in the session and expressed their thanks. They have concerns about the personalizations being gone and hope EBS has clear communication about this to all Finance users. Finance users enjoyed learning Screencastomatic as a tool to create videos.

Summary: Positive Feedback (+)

HCM users are looking forward to the Notepad functionality in Job Data and saving the Timesheet screen as a favorite. They are happy that their personalizations were there: favorites, queries, bookmarks. HCM users are glad that there are no dramatic changes.

Finance users are looking forward to the character count in Description fields, the ability to copy Budget Transfers, the capability to change Category Codes on a purchase order, and the revised Budget Details screen. Finance users are glad that they did not notice any changes and that "it is seamless."



Summary: Questions to Follow Up On

1. HCM: Do we have a query that includes Notepad “notes”? If not, can we create one?
 - Yes, the project team will pursue the creation of a “Notes” query.
2. HCM: Can the Notepad function be added to Personal info screen?
 - This needs to be submitted as an enhancement request.
3. HCM: Will DBT be fast in Production like it is in SDHU?
 - There are a lot of factors that can affect performance (user volume, processes, network, etc...). The upgrade may affect the performance of some processes. Testing indicated some improvement in the performance of the DBT but we felt this was not consistent and further improvement was needed. This has been identified as a priority to research after the PeopleSoft upgrade.
 - If you notice a *decrease* in performance after the upgrade please submit a HEAT ticket with the details of what you experienced and it will be analyzed.
4. HCM: Will district preview sessions be a continued practice for future upgrades?
 - Yes, this was lesson learned from the Technical(Tools) upgrade and is a practice that is planned to be included in future upgrades.
5. HCM: Confirm that users’ direct deposit attachments issue will not be an error in Production.
 - Retested and confirmed that attachments work in HCM on the Direct Deposit and other screens. This was a setup issue in our test environment.
6. HCM: Confirm that benefits processing will not be an issue in Production.
 - We do not anticipate benefit processing issues in production and testing results have all completed successfully. The issues experienced in the preview session were due to the environment and the SWB testing that was in progress. The issues experienced during the preview session were successfully processed later in the day.
7. HCM: Errors in the preview session for absence entry, benefits, payroll summary.
 - These were found to be an issue within the test environment during the morning session. These were retested in the afternoon of 4/20/18 and there were no errors.
8. HCM: “DBT on personalization Taxes tab only is missing.”
 - In testing we did not find that HCM users lost their grid personalizations. In this example, one user lost DBT Taxes tab personalizations. In this case, they will need to be re-added in Production after the upgrade.
9. Finance: Grid personalizations are gone.
 - This has been identified as an action item for Finance users after the upgrade. They will need to re-do any lost Finance grid personalizations. This has been included in announcements from the CRC and was also shared at the 4/26 user group meeting.
10. Finance: Will scheduled jobs (reports/queries) remain after the upgrade?
 - After go live, all reports/queries will remain the same and scheduled jobs maintained.
11. Finance: How did you choose to upgrade or customize more purchasing functions than other modules? Is there a priority or is it based on CRC tickets?
 - This upgrade is an Oracle system update and all fixes / changes were driven by Oracle. There were some issues that were input to Oracle by SDCOE that were included in this upgrade.



12. Finance: Wasn't one of the changes supposed to allow edit of chartfields on reqs over 20 lines in Manage Requisitions instead of Add/Update?
 - Yes, this is included in the upgrade and is now included in the PeopleSoft Upgrade - New Functionality for Users 05-07-18.pdf.
13. Finance: Could there be a problem with users logging in like last time (error was wrong user name or password)?
 - We are not anticipating this issue with the software upgrade. This has been successfully tested in the test environments. Be sure all employees know that they need to clear cache before logging into PeopleSoft.
14. Finance: Is it possible to have Budget Overview description as we hover on the number versus listed as default?
 - This was not included in Oracle's upgrade. If this is required an enhancement request should be submitted.
15. Finance: Will favorites/settings/personalizations change certainly with upgrade, or may change? For example Query Favorites.
 - Testing has shown that all favorites/settings/personalizations will remain with the only exception being the Grid Personalizations in Finance.
16. Finance: When is TA training? Please send a notice once TA guide is revamped.
 - The CRC met with district office staff at SDCOE and Lakeside to communicate the change and ask them to let their employees know about the new functionality. The CRC updated TA_ER Cheat Sheet.pdf and TE1 Travel and Expenses for Employees Guide v3.0.pdf with directions; both are available at <http://crc.sdcoe.net/resources/peoplesoft/guides>. The CRC has selected "How to Enter a Travel Authorization" as the May Third Thursday Demo topic on 5/17/18.
17. Finance: "I couldn't change % - amount when there are 2 chartstrings on a requisition; \$25000 total req value tried splitting \$20000, \$5000 - wouldn't autofill % - gave warning that % couldn't exceed 100% even when I forced 80%/20%"
 - Distribution was marked as quantity on req 19021 with a quantity of 1. This should have been marked as distributed by amount.

Summary: District Business Practices

One of the EBS goals of this project was "to identify ways districts perform tasks in PeopleSoft different from one another and also different than what was presented in training." Each user completed selected tasks in SDHU/SDFU. For each task, he or she made video recordings using Screencastomatic and saved a set of .mp4 video files.

On April 23, an EBS team watched the videos, took notes on each user, and wrote a final summary for each task. Our findings were that, for nearly all tasks, users are following the steps in the training guide (as presented by the CRC in delivered training).