Summary

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It is Kofax' recommendation that all MarkView and associated third party patches, upgrades and updates be applied in the client's test environment and be thoroughly tested before migrating such system changes into a production environment.

Prior to a MarkView upgrade, Kofax strongly suggests that customers refresh their test systems from production. This will not only give an accurate representation for the initial upgrade, but also supply a good environment to reproduce any issues which may arise.

Below is a list of general guidelines as well as information specific to Oracle and other third party software updates.

General Guidelines

1. Backup TEST system
2. Perform the upgrade in the TEST environment
3. Unit test the fix
4. Perform a User Acceptance Test of the changed TEST system
5. Backup PROD system
6. Install in PROD during scheduled system downtime
7. Test PROD system before normal Production uptime

Testing Guidelines

Below is a quick list of key functional areas that you should reference and test, but do not restrict your testing to these areas alone. You should develop your own testing plans, based on your familiarity with MarkView your risk assessment of the changes, your system configuration, and customizations for your environment.

1. Launch the MarkView Viewer(s).
2. Open Process Monitor.
4. Scan and accept a batch of documents.
5. Click ‘Get Next’ from ERP system to retrieve a MarkView document.
6. Auto-attach a MarkView document to an ERP record.
7. Manually attach a MarkView document to an ERP record.
9. Test custom Markups or Markups with custom Lists of Values (LOVs).
10. Print a MarkView document via Print Request (only applicable if Batch Print or Print Server is configured).
11. Send an outbound fax using MarkView Fax.
12. Send an inbound fax to MarkView Fax without a barcode cover page.
13. Send an inbound fax with a barcode cover page.
14. Ensure emails are processed and sent from the Mail Gateway.
15. Send an inbound email in (KIC or File Capture).

Again, you should develop your own test plan, based on your risk assessment and needs.

Migration Instructions

For more information regarding Kofax’ recommended procedures for migrations, please see the Migration section of the MarkView Install Guide.

Click here to access Article 3955 — MarkView Product Documentation.

Customers Applying Oracle Patches

In addition to the recommendations outlined above, customers applying Oracle patches, mini packs or updates should also perform the following steps:

1. Review the patch/alert on Metalink.
2. Review the associated readme and/or release notes
3. Identify which Oracle software components are affected by the patch
4. Cross-reference the affected Oracle software components to MarkView products installed at the customer site
5. For the MarkView products affected, the post-patch testing should include specific focus in those areas
6. If this is an Oracle Financials Family Pack or AP Patchset and the customer’s environment uses the MarkView Distribution Form Markup, customers should ensure that the MarkView Distribution Form Markup is fully tested in the patched environment
7. Changes to the invoice process (entry/validation/approval) or to the payables setup should be tested before rolling them into production
8. For any customizations or non-standard configurations to the invoice setup, customers should first check with Kofax Technical Support to confirm support of the new configuration
9. Confirm the reintegration steps and Frequently-Encountered Problems when applying Oracle patches: Article 3943 — Recommended Check List; Re-integration Steps and TroubleShooting Steps After Applying an Oracle Applications Patch or Update to a MarkView Environment.
Customers Applying Other Third Party Patches or Updates

In addition to the recommendations outlined above, customers applying third party patches or updates should also perform the following steps:

1. Review the readme and/or release notes for the patch
2. Identify which components of the third party software affected
3. Cross-reference the affected third party software components to MarkView products installed at the customer site
4. For the MarkView products affected, the post-patch testing should include specific focus in those areas

Before applying MarkView and associated third party patches, upgrades and updates, customers may wish to contact Kofax Technical Support to inquire about any additional information Kofax can provide regarding the specific patch or update.

In addition, customers performing a major system upgrade may wish to contact their Kofax Practice Manager to discuss options for analyzing the overall impact of these product upgrades on their MarkView implementation.

Client_UAT_Test_Cases.xls

Keywords: update, upgrade, patch, os, oracle, mini, test, uat, system, operating, migrate