

# Collect! Pre-Upgrade Testing Form

## Summary

Version 12 and higher uses the Microsoft SQL Server as the database engine. As this is a significant core change, upgrading to version 12 or higher requires proper testing.

This process has been put in place to protect your data and operational security by identifying issues specific in your environment prior to the production cutover. We do not recommend moving from the test environment to your live environment without systematic completion of this process. We strongly recommend that you exercise the program with your most used as well as your most complex tools and processes.

Please test each of these sections, particularly the ones that are critical to your business operations. If you do not use any of the components, simply write "Do not use" next to the heading. We test the default and primary functions in Collect!, but as Collect! is fully customizable for features such as aliases and control files, it is not possible to test every possible combination of configurations that our users may have in place.

## Networking

Do you use a multi-user environment? Do you have remote users connecting to Collect! via a VPN or Terminal Server? The SQL Server and the Collect! Companion server ports need to be open on the network firewall. If you use a default instance for SQL server, then it should be port 1433, if you don't, then you will need to find the port number. For the Collect! Companion Server, you need to open port 2530.

I verify that I have tested this section. \_\_\_\_\_

## System Setup

Check to ensure all your preferences like date format, etc. all upgraded properly.

I verify that I have tested this section. \_\_\_\_\_

## Security

This includes signing in, browsing accounts, viewing the correct field labels.

I verify that I have tested this section. \_\_\_\_\_

## Data Entry

This includes creating and editing clients and debtors. It also includes grouping debtors together.

I verify that I have tested this section. \_\_\_\_\_

## Work in Progress

This includes accessing the to-do list, sorting, filtering, marking contacts as done, creating new contacts.

I verify that I have tested this section. \_\_\_\_\_

## Contact Plans

This includes creating, editing, and running contact plans.

I verify that I have tested this section. \_\_\_\_\_

## Archiving

Ensure that you can archive and restore accounts. NOTE: SQL Server does not store the archive data in a separate database like Raima, it's in the same database, but separate tables.

I verify that I have tested this section. \_\_\_\_\_

## Credit Bureau Reporting

This includes setting up accounts for reporting, editing accounts as needed, and running the report. NOTE: If you are upgrading as a result of any compliance changes, please test the new behavior of Collect!.

NOTE: the CBR files are now located at Collect\Log Files\cbr

I verify that I have tested this section. \_\_\_\_\_

## Payment Plans

This includes creating and editing payment plans, and updating the payments when they are to be posted.

I verify that I have tested this section. \_\_\_\_\_

## Promises

This includes creating and editing promises, and posting payments (Full, Over, and Under Payment and Broken Promises).

I verify that I have tested this section. \_\_\_\_\_

## Billing Tree

Unfortunately, you cannot test this module as it would post double payments to the debtor. We have tested this module comprehensively in-house.

## Batch Processing

This includes processing automatic contacts, grouping accounts together, running contact plans in a mass, preparing accounts for CBR in a mass, and running the recalculation function.

I verify that I have tested this section. \_\_\_\_\_

## Autodialer (Click to Dial)

Check to ensure that you can dial out.

I verify that I have tested this section. \_\_\_\_\_

## Predictive Dialing

This includes sending a call list to the dialer and that Collect! redirects to the correct account when the dialer routes a call to the agent.

I verify that I have tested this section. \_\_\_\_\_

## TCN Broadcasting

This includes sending a call campaign to TCN and downloading the call report.

I verify that I have tested this section. \_\_\_\_\_

## Reports and Letters

This includes creating and editing reports and letters. This also includes printing reports and letters manually and with the scheduled batch letter function. Test any reports that are critical to your operations like operator or client reports, or any exports that you use.

I verify that I have tested this section. \_\_\_\_\_

## Letter Service

This includes creating the letter service file. Ask your letter service provider if they can test the file to ensure that it is formatted properly. Test any letters that are critical to your operations.

I verify that I have tested this section. \_\_\_\_\_

## Control Files

This includes creating and editing control files and ensuring that they run when a form loads or field changes.

I verify that I have tested this section. \_\_\_\_\_

## Task Scheduler

This includes creating and editing events and ensuring that they run at the scheduled time.

I verify that I have tested this section. \_\_\_\_\_

## Imports

This includes creating and editing import maps. This also includes importing data files into the system. Test any imports that are critical to your operations like client data loads, skip trace maps, payment files. NOTE: if you use this module for exporting data too, instead of the report module, please test your export maps.

I verify that I have tested this section. \_\_\_\_\_

## Month End

This includes generating statements, printing checks, and printing statements.

I verify that I have tested this section. \_\_\_\_\_

## Database Change Logs

This function is now managed by SQL Server and is NOT enabled by default. If you use this feature, let us know so we can install the SQL logging procedures. Accessing the logs can be done via SQL queries or 3<sup>rd</sup> party reporting tools. We do offer a graphical user interface for the change logs as part of the Analytic Dashboard module. Please contact Administration for pricing.

I verify that I have tested this section. \_\_\_\_\_

## Database Maintenance

This function is now managed by SQL Server. We have provided a checkSQL.bat file in the bin folder that will check the database for errors. It will put the results into a file called check.repair. If the file is empty (OKB), then there were no errors.

I verify that I have tested this section. \_\_\_\_\_

## Database Backups

This function is now managed by SQL Server. We have provided a backupSQL.bat file in the bin folder that will create the backup (.BAK) files, then compress them into a .TAR.GZ file located in the Collect!\snapshots folder. This behaves similarly to the Raima snapshot feature.

I verify that I have tested this section. \_\_\_\_\_