Fill in this form when requesting software packaging, all sections with asterisks (**\***) **MUST** be completed.[[1]](#endnote-1)

Please return this form after completion to: UAMUK.it-solutions@atos.net

## Document Change Control

|  |  |  |  |
| --- | --- | --- | --- |
| Version | Date | Description / Reason for change | Author(s) |
| 1.0 | 11/01/2017 | Initial application discovery document | Benjamin Gregory |
|  |  |  |  |
|  |  |  |  |

## Request Details

|  |  |
| --- | --- |
| Ticket/Request Number\*[[2]](#footnote-1) |  |
| Requester Organisation\* | National Savings and Investments |
| Requester Name (first and last name)\* | David Hislop |
| Requester Email\* | David.Hislop@atos.net |
| Requester telephone number\* | 077080Test |
| Requester department and location\* |  |
| Cost Code\* |  |
| Date of request | 11/01/2017 |
| Client reference |  |
| UAM ID[[3]](#footnote-2) | No defect associated |

## Application Details

|  |  |
| --- | --- |
| Application Name\* | Thaler |
| Application Version\* | 3.1.0.3 |
| Application Manufacturer\* | Sopra Banking Software |
| Application Vendor Contact\* | N/A |
| Application Language (GUI)\*[[4]](#footnote-3) | English |
| Main purpose/ functionality summary\*[[5]](#footnote-4) | Sopra Thaler banking software for the EDD environment. |
| Set Application Layer \*[[6]](#footnote-5) 🡪 | Layer 3 - Optional Application (Licensed / Available to selected users only) |
| Application/Package History[[7]](#footnote-6) | N/A |

## Business Unit / Support SME Contact Details

|  |  |
| --- | --- |
| Business Unit, Divisions or Region\* | NS&I to confirm |
| Application Owner Name | NS&I to confirm |
| Application Owner Email | NS&I to confirm |
| Application Owner Phone | NS&I to confirm |
| Functional/Technical Support Name | NS&I to confirm |
| Functional/Technical Support Email | NS&I to confirm |
| Functional/Technical Support Phone | NS&I to confirm |

## Request Type

|  |  |
| --- | --- |
| Package Type. \*[[8]](#footnote-7)  Please select from dropdown. | App-V 5 |
| Select Request Type \*[[9]](#footnote-8) | New package request |
| Existing package archive (upgrade) | N/A |
| Remark [[10]](#footnote-9) |  |

## Target Platform

|  |  |
| --- | --- |
| Platform Details\*, select from the drop down list OR enter it manually by typing in boxes provided in right column of the table. | |
| Adaptive Workplace Version (AWS) [[11]](#footnote-10) | Not applicable |
| Operating System(s) | Windows Server R2 64Bit |
| Deployment Mechanism used | VAS |

## License and Usage Details

|  |  |
| --- | --- |
| License Type – If KMS, MAK or Single Use License please specify the details below. | Choose an item. |
| License Key or Serial number | N/A |
| License server details[[12]](#footnote-11) | N/A |
| Number of licenses | N/A |
| Number of users[[13]](#footnote-12) | N/A |

## Location Details of Application Software (source files)

|  |  |
| --- | --- |
| Location of the source files\*[[14]](#footnote-13) | \\gbbbm0080\customers\National Savings and Investments\Thaler-3103-AV-BBC \R01-B01\Source |
| Total size of the binaries | 4.58 MB |

## Hardware Prerequisites

|  |  |
| --- | --- |
| Does the application have any hardware dependencies?\*[[15]](#footnote-14)  For example: in case of drivers, dongles or other peripherals. Drivers required to be packaged should be documented in section 13 | N/A |
|  | |

## Software Prerequisites

|  |  |
| --- | --- |
| Does the application have a dependency components and applications in the order that they were installed [[16]](#footnote-15)  Examples: 1. .Net Framework 3.5  2. Oracle Client v9.2.0.54  3. Java Runtime Environment 6.012 | N/A |
|  | |
| Is the software prerequisite packaged and available in the Application Hub? N/A | N/A |
| Is the software prerequisite packaged and available in the production environment? N/A | N/A |

## Other Prerequisites

|  |  |
| --- | --- |
| Other components or pre-requirements that need to be available on the client or server before the installation starts?  Examples:  Connection to (local) CLIENT network, network shares, databases, host names. Specify also how to connect (IP address, Host Name, Wins, DNS names etc). | YES - Specified below |
| Environment Name = BBC  Port =TestPort  Host Address = TestAdress  Resource Path = TestResourcePath | |

## Uninstall Actions

|  |  |
| --- | --- |
| Components / applications to be uninstalled on the client/server before the installation can take place?  Specify application name and version to uninstall. Supply the application source to uninstall and/or if applicable the application GUID. This is a prerequisite for removal of software | N/A |
|  | |

## Application Compatibility Details

|  |  |
| --- | --- |
| Application compatibility testing / reports available?  Example: AppDNA application compatibility report | N/A |
|  | |

## Installation & Configuration details

Please provide step by step install instructions by providing screen dumps (so that the Packaging team can replicate the same install method/options). Remember to document full directory paths, check box names and options to be selected etc. If a license key is needed, list it separately so it can be filled in by using copy & paste. Perform the installation as default as possible by accepting all default settings. Only when a justification exists an exception can be made.

Allowed exceptions are:

* disable automatic updates [[17]](#endnote-2)
* remove desktop shortcuts
* remove uninstall shortcuts

Please record any installation errors and all manual corrections made in order to make the installation proceed without error. Changes made to the Operating System and security settings and any POST installation steps will also be required.

#### Pre-Installation Steps\*

|  |  |
| --- | --- |
| Application account for installing, configuring and testing the app. | N/A |
| Application Password if applicable | N/A |
| **Disable the windows installer service to determine whether the setup.exe installs an MSI to aid the packaging process.** | |

#### Installation Steps\*

|  |  |  |
| --- | --- | --- |
| Thaler 3.1.0.3  1 – Modify the config.ini using details supplied for the environment requested (see section 11)  2 – Run Thaler3.1.0.3\_env\_Dev.EXE to install    Thaler application files and registry are installed via a PowerShell installation script (Thaler installer.PS1).  The installer executable has been updated with a newer version of the vendor’s Thaler.exe to version 3.1.03  A compiled PowerShell executable (ThalerIII.exe). This has been written to include logic as follows:  1/ Reads user ID from a file on the NETAPP in NSI. If user ID is found, it reads in and sets the variable ‘PCIdent’ in the registry. This is to avoid a duplicate PC ID issue.  2/ This App is DR aware. It reads the system state from a NETAPP file and pulls in values from Normal or DR ini files depending on what state it is in. These values are written to the registry.  The App will fail to launch if USER ID cannot be found or system state cannot be determined.  Configuration:  [Environment]  ENV=BBC  HOSTADDRESS=TestAdress  HOSTPORT=TestPort  RESOURCEPATH=TestResourcePath | | |
| Reboot needed after installation? | Yes | No |
| Installation Steps – Completed | | |

#### First Launch Test & Post configuration\*

Test the first launch of every application ensuring they work and document below all findings relating to the list below:

|  |
| --- |
|  |

## Installation Verification Checks

#### About Menu

|  |
| --- |
| N/A |

#### Control Panel Entry (ARP)\*

|  |
| --- |
| N/A |

#### Automatic Updates Disabled

|  |  |  |
| --- | --- | --- |
| Are automatic updates disabled within the application? | Yes | No |

#### File Type Associations

Document FTA installed. This can be checked in Control Panel \Default Programs\Associations

|  |
| --- |
| N/A |

#### Launching Of File Types

|  |  |  |
| --- | --- | --- |
| Does application launch with specified file types? | Yes | No |

#### Context Menu

|  |
| --- |
| N/A |

## Functional Testing

Detailed here should be tests ensuring the application works as per the manufacturer’s instructions. The tests should revolve around the basic functionality of the application, ensuring the main features behave as expected.

These tests should include open/close, saving and help and about menus are functioning etc...

Document below the top 3-5 relevant tests used by the specific application:

|  |
| --- |
| NA – Application needs to be tested in NSI environment with backend present. |

## Post Installation Information

#### Installation Location\*

Enter the installation-location of application files in the table below:

|  |  |
| --- | --- |
| Application files (INSTALLDIR)\*  %ProgramFiles%\ | %ProgramFiles(x86)% | Click here to enter text. |
| Common Program Files \*  %commonprogramfiles%|%commonProgramFiles(x86) | N/A |
| Other locations \*  If the application does NOT install any files in of the locations above; check and document if files into installed into other locations: %WinDir%, System, System32, SysWow64, Downloaded Program Files, Temp, INF, %userprofile%, %systemdrive% | N/A |
| Does application write data in %User Profile%? | If YES; enter Size: |

#### Additional information

Other information to be noted when packaging the application[[18]](#footnote-16)

|  |  |
| --- | --- |
| If any of the checks below are applicable please select ‘YES’ and detail below. | NO |
| Environment Variables (if Applicable)[[19]](#footnote-17) required? |  |
| Drivers (if Applicable) required? |  |
| Hard Coded Drive mapping (if Applicable)? |  |
| Oracle TNS names entries to add? |  |
| Sybase SQL.ini entries to add? |  |
| ODBC connections to add? |  |
| **Additional Comments:** | N/A |

#### Firewall Settings

|  |
| --- |
| N/A |

#### Policy Settings

|  |
| --- |
| N/A |

#### UAC Prompts

|  |
| --- |
| N/A |

## Shortcuts

Only supply the shortcuts that will be used.[[20]](#footnote-18)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Shortcut Name | Target | Parameters | Start in | Icon filename | Location in the start menu |
| Thaler v3 (BBC) | C:\Pragram Files (x86)\Thaler 3.1.0.3\Thaler.exe | N/A | C:\Pragram Files (x86)\Thaler 3.1.0.3\ | N/A | “%ProgramData%\Microsoft\Windows\Start Menu\Programs\Enterprise Applications\Thaler v3 (BBC).lnk" |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## NTFS Rights

The following directories should be granted **additional** rights to the user in order for the application to function correctly (see also Legend NTFS Rights):

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| File or Directory name | | NTFS Permissions | | | Additional comments |
| N/A | |  | | |  |
|  | |  | | |  |
|  | |  | | |  |
|  | |  | | |  |
| **R** = Read | **W** = Write | | **P** = Change permissions |
| **X** = Execute | **D** = Delete | | **O** = Take ownership |
|  |  | |  |

## Registry Rights

The following registry keys or hives should be granted **additional** rights to the user in order for the application to function correctly (see also Legend Registry Rights):

|  |  |  |  |
| --- | --- | --- | --- |
| Key name | Registry Permissions | | Additional comments |
| N/A |  | |  |
|  |  | |  |
|  |  | |  |
|  |  | |  |
| **F** = Full Control | |
| **R** = Read | |

## Application Package Complexity

The following section defines the overall complexity of the application by the packaging engineer based on the discovery process.

|  |  |  |
| --- | --- | --- |
| Package Complexity\*  UAM use only: This is based on Complexity Matrix used to determine application package complexity | Simple |  |
| Medium |  |
| Complex |  |

## Deployment information

|  |  |  |
| --- | --- | --- |
| Distribution method\* | Advertised  User can install the application from advertised programs. | Mandatory  Application will be installed automatically by SCCM. |
| Additional required services during deployment. | Standby of package engineer  Deployment outside office hours | |
| Additional deployment information/requests  For example, Deployment Types in SCCM  - Only when a user is logged on  - Whether or not a user is logged on  - Only when no user is logged on |  | |

## Signoff

|  |  |  |  |
| --- | --- | --- | --- |
| User Acceptance Test (UAT) User Contact Information | | | |
| Full Name | Telephone | Email | UserID |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

This section is for the client to sign and agree that the application has been installed and configured to their requirements. The application will be packaged and configured to match identically the information provided in this document. If the application needs to be reworked due to a misconfiguration provided to us you may be recharged for this work to take place.

|  |  |  |
| --- | --- | --- |
|  | Requester | Engineer |
| Name | David Hislop | Benjamin Gregory |
| Date |  | 11/01/2017 |
| Signature |  |  |

## Appendix

For more information on how to complete this form, please check with UAM for example discovery.

1. Fields requiring longer text / screenshots are also included in appropriate sections within the document, note that it is possible to drag and drop files in such fields. In order to tick a check box, double click the boxes required and select “Checked”. [↑](#endnote-ref-1)
2. Fill in the RFC, UAM Request ID, RR or SIR reference. [↑](#footnote-ref-1)
3. Enter UAM ID of previous package or UAMDEF ID. [↑](#footnote-ref-2)
4. This is the GUI language of the application eg. English, German, etc. [↑](#footnote-ref-3)
5. Inset short description of the application’s “functionality”, avoid using marketing statements. [↑](#footnote-ref-4)
6. Select appropriate layer as per [Application Layers](http://gbbbm0080.uk.int.atosorigin.com/ApplicationPortal/_layouts/help.aspx?AssetKey=%2FLists%2FSite%20Collection%20Help%2FUAMCentral%2FUAM%20Service%20FAQ%2FUAM%20Application%20Layers%2Ehtml%3Bd48d5a73%2D193a%2D44ae%2Db862%2D23062bf70fd1%3B) presentation from dropdown OR enter in text field.  
    [↑](#footnote-ref-5)
7. Input any relevant knowledge on previous packages and/or knowledge base articles (search for both on the UAM HUB). [↑](#footnote-ref-6)
8. Select application packaging technology type from dropdown OR choose ONE only from tick boxes. [↑](#footnote-ref-7)
9. Specify whether this is a request to package a new application or an update to previously packaged app [↑](#footnote-ref-8)
10. Examples: ‘Professional’, ‘Enterprise’, also use to record Environment Name / Business Unit / Organisational Unit (OU) in case the request is to package the application to a certain OU only eg. LON, CRE, ASC, INSS, etc. [↑](#footnote-ref-9)
11. Select the appropriate AWS design as per Active Directory structure and design. [↑](#footnote-ref-10)
12. License servers and port numbers [↑](#footnote-ref-11)
13. Number of expected amount of users and if applicable the number of concurrent users. [↑](#footnote-ref-12)
14. Ensure UAM can access the location. *UAM ACTION*: Move source files into *\Source* folder [↑](#footnote-ref-13)
15. Specified peripherals must be delivered to the packaging team. [↑](#footnote-ref-14)
16. This should include both packaged and non-packaged apps. Listed non-packaged applications should have a separate request. [↑](#footnote-ref-15)
17. Provide screenshots how to disable automatic updates when the application User Interface is in a non-English language. [↑](#endnote-ref-2)
18. Provide details if there any test files, test data supplied to be used when packaging / testing the packaged application. [↑](#footnote-ref-16)
19. Specify which environment variable should be changed or should be additionally added. [↑](#footnote-ref-17)
20. Shortcuts on the desktop and uninstall shortcuts will not be included in the packages. [↑](#footnote-ref-18)