PeopleSoft Financials Foundations Upgrade Final Cutover

Tuesday, December 10th from 11:00 a.m. – 11:30 a.m.

The PeopleSoft Financials Foundations Upgrade Final Cutover webconference was held on Tuesday, December 10th from 11:00 – 11:30 a.m.

In this webconference, the GeorgiaFIRST Team reviewed:

- Activity to be completed on Thursday, December 12th prior to the start of the upgrade, and
- Institutional validation steps to be completed on Monday, December 16th after the upgrade.

To View the Archive

Go to this link:

https://borusg.webex.com/borusg/lsr.php?AT=pb&SP=EC&rID=19552492&rKey=6f56b75fe2a98958

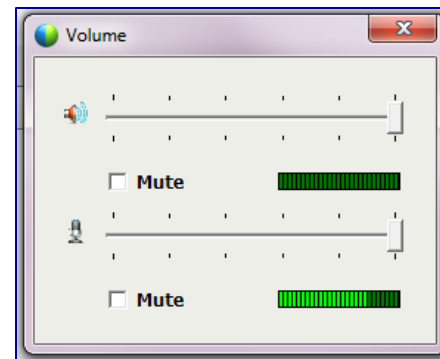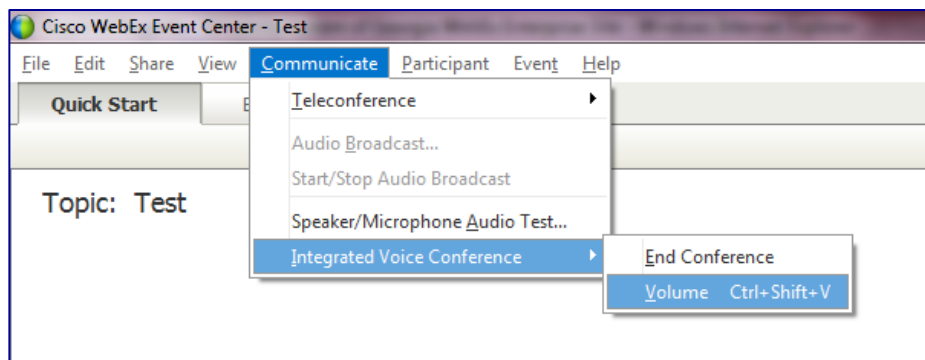Slides from the presentation are available on the following pages.

Foundations Upgrade Institutional Readiness

GeorgiaFIRST Team

December 10, 2013

WebEx Housekeeping

- Audio and volume adjustment

- If you cannot hear audio through your computer speakers, please dial in to the conference line:

(646) 307-1300, access code 9759227

WebEx Housekeeping

- Submit questions via the chat function to all participants

- We may hold some of the questions until the end of the presentation

- Recording and slides will be available later today or tomorrow

Agenda

- Update on Application Upgrade Planning

- Review Foundations Upgrade Readiness Tasks

- Upgrade Timeline

- Institutional Validation

- Q&A

Preparing for Application Upgrade

- Fit/Gap Sessions will begin in January

- First two modules scheduled:

  – Asset Management (2 days)

  Wednesday, January 22nd – Thursday, January 23rd

  – Budget Prep (3 days)

  Tuesday, January 28th – Thursday, January 30th

- WebEx scheduled early January with details

Upgrade Related Documentation

GeorgiaFIRST Financials

Overview	**PeopleTools 8.52 Upgrade (Fall 2013)**
Documentation	🖨 Print friendly ✉ Email or share Modified December 9, 2013
Announcements	**Cutover Dates: December 12th - December 16th**
Known Issues	**Communications and Resources**
Releases	• Cutover Coordinators 📊
▶ Project Information	• Institutional Tasks and Responsibilities Checklist 📊
Training	• Security Access and Password Controls 📄
GeorgiaFIRST Events	• Impact to Self Service, GeorgiaFIRST Marketplace, and iStrategy 📄
iStrategy/Reporting	**Technical Instructions**
Budget Issues Committee	• Start Here! 📄
Support	• Workstation and Browser Requirements and Configuration Guide 📄
	• Oracle's Browser Compatibility Guide 📄
	• Oracle 11g Installation Guide 📄
	• PeopleTools 8.52 Installation Guide for Crystal and nVision 📄
	• Spreadsheet Load for PT8.52 (zip file)
	• SwiftView Installation Guide 📄
	• PeopleSoft Financials Banner Integration - Revised 12.3.13 📄
	• GeorgiaBEST Enhancements 8.27.1 - Additional Details 📄

Institutional Readiness Tasks

Things to Do Prior to Upgrade

- Confirm that ITS has the correct Cutover Coordinator for your institution.
  - Refer to the Cutover Coordinators list on the Georgia*FIRST* website.
  - Contact donna.wooddell@usg.edu **ASAP** with any changes.
    - Provide email address and phone number.

Things to Do Prior to Upgrade

- Confirm that you are using a supported browser. Refer to:

  - *Workstation and Browser Requirements Configuration Guide*

  - *Oracle's Browser Compatibility Guide*

- Identify Workstation Configuration setup needs for advanced users.

- Determine what password you will use per new password controls on Monday morning.

Things to Do Prior to Upgrade

- Plan for Go-Live Validation WebEx
  - Monday, December 16 - 9:00am-11:00am
  - WebEx link will be sent to Cutover Coordinators later today (December 10)
  - Cutover Coordinators will need to <u>register by close of business Thursday (December 12)</u>

Things to Do Prior to Upgrade

PSQUEST access

- FPROD will replace F89RPT and F89PRD

- New passwords effective Mon 12/16/2013

- Security Administrators should contact ITS Helpdesk to request new PSQUEST Password.

- See announcement posted on 12/9/2013

Things to Do Prior to Upgrade

- ## Banner Integration and Links

  http://www.usg.edu/gafirst-fin/project_information/peopletools_8.52_upgrade

  GeorgiaFIRST: PeopleSoft Financials Banner Integration - Revised 12.3.13
  GeorgiaBEST: GeorgiaBEST Enhancements 8.27.1 - Additional Details

- ## FPLAY is available for testing banner connections

- ## DOWNTIME: Plan for and Notify resources
    12:00 pm THU 12/12 to 9:00 am to MON 12/16

Things to Do Prior to Upgrade

- Review PT8.52 Upgrade Release Notes
  - Release notes will be sent out Friday to the listserv
  - Will also be posted to the GeorgiaFIRST Financials website.

5:00pm
Wednesday, December 11

Access to Self Service

- ITS will remove access to Self Service portal at 5:00pm, Wednesday, December 11.

- This impacts Expenses and GeorgiaFirst Marketplace

- Core users can continue to access core portal until noon, December 12 to complete final transactions needed prior to upgrade.

12:00pm (noon)
Thursday, December 12

Transactional Processing

- All transactional entry and processing should end at noon.

  – Requisitions, PO's, Vouchers, Payments, JE's, etc.

- Process instances (process monitor) will be allowed to run to completion but must be completed prior to 2:00pm.

- Institutions should obtain all reports/files:

  – AP Checks printed

  – ACH/EFT/Positive Payment Files

Transactional Processing

- Users should log out of production as soon as they are finished (prior to 2:00pm).

- Georgia*FIRST* team will monitor production processes to confirm they run to success.

2:00pm
Thursday, December 12

ITS Final Pre-Upgrade Steps

- Database Access Removed
  - ITS will make firewall change to remove access to production (F89PRD), Reporting (F89RPT) instance and FPLAY.
  - If you are still logged in when the firewall rule is changed, you will get kicked out of PeopleSoft.

ITS Final Pre-Upgrade Steps

- Initiate BORDAILY batch job

  – This will take approximately 3 hours

- Review Integration Broker for errors and pause queue

- Final review and cleanup of instances in process monitor (No Success, Error, Cancelled)

- When BORDAILY completes, notify DBA's to begin backup of production.

ITS Final Pre-Upgrade Steps

- Obtain "Pre-Validation" query results for each institution:
  - (PO) BOR_PO_OPEN_AMOUNT_ALL
  - (AP) BOR_AP_OPEN_LIAB
  - (EX) BOR_EX_OPEN_LIAB
  - (ePro) BOR_REQ_OPEN_AMOUNT_ALL
  - (GL) BOR_TRIAL_BALANCE
  - (KK) BOR_KK_ENC_BAL_AS_OF_PD
  - (AM) BOR_ASSET_LISTING_AUDITORS

ITS Final Pre-Upgrade Steps

- Approximately 6:00pm, Thursday, December 12:

  - Turn production database over to the DBA's to begin upgrade.

Sunday, December 15

ITS Upgrade Validation

- Confirm access to new FPROD production.

- Test environment (REN Server, access to GFM, Self Service, etc.).

- Contact one institution to validate Firewall rules and institutional access.

- Obtain "Post-Validation" query results.

- Complete manual setup steps.

- Activate Scheduled jobs.

Monday, December 16

Institutional Setup

- Banner Links
  - Must be completed prior to 9:00am
  - Refer to announcements on the website
- PSQUEST access
  - This can be completed any time Monday

Institutional Validation

- Go-Live Validation WebEx
  - Georgia*FIRST* Production Support and Technical teams will be logged in and ready to assist with questions or issues as they are reported during the WebEx.
  - This WebEx will be collaborative. We will use conference call line for audio (unmuted) and the session will not be archived.
  - Once the WebEx ends, institutions will need to submit a Helpdesk ticket for assistance.

Institutional Validation

- WebEx Go-Live Validation Steps:
  - Clear browser cache/history
  - Add FPROD to trusted sites
  - Pop-up blocker
- Refer to:
  - Workstation and Browser Requirements Configuration Guide
  - Oracle's Browser Compatibility Guide

Institutional Validation

- Log into new FPROD production:
  - Password should be expired.
  - Will need to reset using new password controls.

- Security access:
  - Review Navigation and confirm same access as previous F89PRD production.

- Query Validation:
  - Query access is correct (viewer, public, private)
  - Campus queries exist

Institutional Validation

- Access to Self Service Portal

- Punchout to GeorgiaFirst Marketplace

- Perform data validation

  – ITS will provide pre and post validation queries

- In PS: Query Banner view tables (BOR_BNR_ZUFGxx)

- In Banner: Review Chartfield table

- Run BOR nVision SNP to window

Institutional Validation

- Execute entry of a production transaction:

  - Be prepared to have a user enter a Purchase Order or Voucher.

  - Complete transactional processing.

- Once Go-live validation steps are completed, Cutover Coordinator will provide new URL and notify end users of production availability.

Additional Institutional Validation

- Additional validation (not during the WebEx)
  - Printing of AP Checks
    - Refer to SwiftView_install_for Windows7.pdf
  - Use of the Spreadsheet loads: **New Spreadsheets**
    - Refer to Spreadsheet_Load_for_PT8.52.zip
  - PSQUEST extractions
  - Run an institutionally developed nVision, Crystal or SQR
  - Run Banner Interfaces

Summary of Key Dates and Tasks

- Thursday, December 12 - F89PRD production will be turned over to DBA's.

- Sunday, December 15 - new FPROD Production will be available for PeopleSoft Financials team to complete validation and setup.

- Between 7:00am - 9:00am Monday, December 16[6] - Institutions establish Banner link.

- Monday, December 16 at 9:00am - Cutover Coordinator participates in Go-Live Validation WebEx.

Q&A