

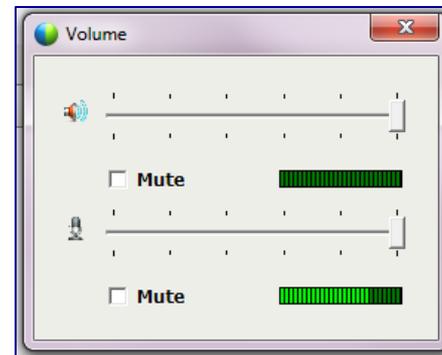
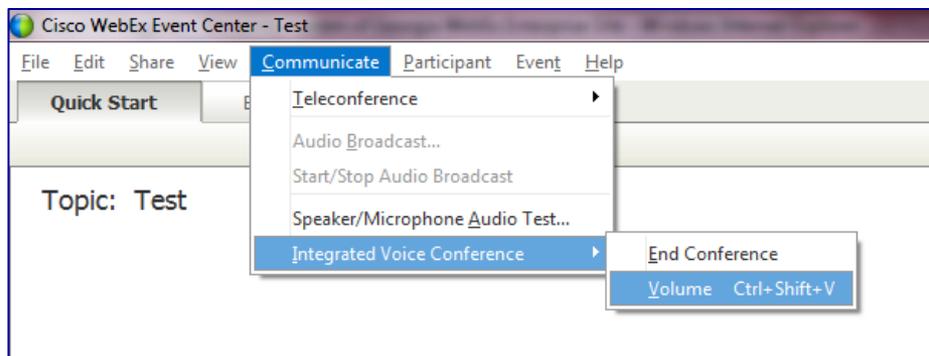


Foundations Upgrade Institutional Readiness

GeorgiaFIRST Team
November 20, 2013

WebEx Housekeeping

- Audio and volume adjustment in WebEx



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

(605) 475-6333, access code 9759227

WebEx Housekeeping

- Submit questions via the chat function
- May hold some questions to the end of WebEx
- Full hour of content, but we will stay online to answer questions after the presentation
- Recording and slides will be available tomorrow

Agenda

- Cutover Dates and Downtime
- Banner Integration
- Technical Information
- UAT Recap
- Cutover Planning and Expectations
- Reporting Solution Changes and Final Query Review
- Password Controls
- Helpdesk Communications

Cutover Dates and Downtime

Foundations Upgrade Status

- Accomplishments
 - Technical (H/W, Operating System, DB Upgrade, PeopleTools Upgrade)
 - System Testing
 - User Acceptance Testing
 - Performance Testing
 - Several “Test Moves to Production”

Cutover Dates and Downtime

- Cutover Dates
 - Thursday, December 12th - Monday, December 16th
- Downtime
 - Last submittals into PeopleSoft **by 12 PM on Thursday, December 12th**
 - No new processes after 12 PM on December 12th

Cutover Dates and Downtime

- Downtime continued
 - Queued processing will be allowed to run from 12:00pm December 12th – 2:00pm December 12th
 - **All users will be unable to access PeopleSoft, and existing users will be ‘kicked out’ of the PeopleSoft system at 2:00pm on Thursday December 12th**
 - Final Batch processing (BORDAILY) will be run by ITS starting at 2:00pm

Cutover Dates and Downtime

- Downtime continued
 - Institutional Validation reports/queries will be run by ITS against the Production PeopleSoft environment
 - ITS PeopleSoft Support Team will prepare the Production environment to turn over to the ITS DBA Team
 - PeopleSoft database will be turned over to the ITS DBA Team on the night of Thursday, December 12th

Cutover Dates and Downtime

- Downtime continued
 - ITS DBA Team migrates data to new hardware, operating system, and database platform
 - ITS PeopleSoft Support Systems Administration Team begins PeopleTools upgrade Friday evening/Saturday morning
 - PeopleTools upgrade should be completed on Sunday

Cutover Dates and Downtime

- Downtime continued
 - ITS PeopleSoft Support will run validation steps and Institutional post upgrade validation report/queries
 - **When the upgrade is complete, institution Banner DBAs will need to work with ITS to establish the Banner links for their institution 7:00am – 9:00am on Monday, Dec. 16th.**

Cutover Dates and Downtime

- Institutional Go Live Validation Webex
 - 9:00 am on Monday, December 16th
 - For Institutional Cutover Coordinators
 - Purpose is to walk-through initial login and validation activities

Cutover Dates and Downtime

- Following Validation WebEx, institutions need to communicate availability to their end-users
- Security Administrators should be available to assist in password changes as needed

Summary of Cutover Timeline

Date	Timeframe	Task
Thursday 12/12	Noon	Institutions complete all Financials processing
Thursday 12/12	Noon – 2pm	Queued processing will be allowed to run. (processes within the process monitor at 12pm will be allowed to run to completion)
Thursday 12/12	2pm	ITS removes institutional access to Production
Thursday 12/12	2pm	ITS runs BORDAILY batch job <ul style="list-style-type: none"> Upon completion, ITS runs institutional validation queries and reports and prepares final steps to prepare database for ITS DBAs.
Thursday 12/12		ITS upgrade activities begin
Monday 12/16	7am – 9am	Establish Banner links
Monday 12/16	9am	Validation of new Production environment

Impact of Downtime

- Integration Points
 - iStrategy
 - GeorgiaFIRST Marketplace
 - PeopleSoft Expenses Self-Service
 - ADP
 - Banner

Banner Integration and Technical Information

Banner Integration

Functional Impact

- PSFIN upgrade: December 12 – 16
- Transaction processing must be completed by 12:00 noon on Thursday, 12/12/2013
- F89PRD will not be accessible after that time!
- New FPROD available Monday 12/16/2013
- Notify all Banner and PS resources

Banner Integration

Technical Impact:

- Database links need to be dropped and rebuilt
- Update firewall rules (non-hosted institutions)

Announcement with more detail will be posted to the GeorgiaFIRST email list, the GeorgiaBEST DBA listserv as well as the GeorgiaBEST Community.

Banner Integration

Institution Plan:

- Download Banner Release
- Non-hosted institutions
 - Create firewall rules (details to be provided)
 - Apply the scripts between 7:00am-9:00am on 12/16/2013
- Hosted institutions
 - Open a ticket with GeorgiaBEST technical services by Monday 12/9/2013 for application of upgrade

Banner Integration

Banner Resources Needed For:

- Testing during the Go Live Validation WebEx on 12/16/2013
- Troubleshooting on Monday 12/16/2013

Workstation Configuration

Most Workstations:

- Will only need minor setting changes
- Please refer to the following guides:
 - *Workstation and Browser Requirements and Configuration Guide*
 - Pop-up blocker
 - Trusted sites
 - *Oracle's Browser Compatibility Guide*

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

Workstation Configuration

Some Workstations:

- Spreadsheet load files
- Swiftview for check printing
- Please refer to the following guides:
 - Spreadsheet_Load_for_PT8.52.zip
 - SwiftView_install_for_Windows7.pdf

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

Workstation Configuration

Some Advanced Users or Technical Staff:

- PSQUEST (2-tier) access
- Crystal or nVision report developers
- Please refer to the following guides:
 - *Oracle 11g Installation Guide*
 - *PeopleTools 8.52 Installation Guide for Crystal and nVision*

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

Browsers

- Internet Explorer 8, 9, 10 (11?)
 - For 10+, use compatability mode
- Chrome 13? (Current = 30+)
- Firefox 7 (current = 25+)
- Safari 6

Browsers

- Troubleshooting
 - Refer to the guides
 - Clear browser cache/history often and restart the browser.
 - **Do this first thing after the upgrade!**
 - Try a different browser
 - Restart your workstation

PSQUEST Access

- F89PRD/F89RPT access ends 2:00pm Thursday 12/12/2013
- You will be notified when PSQUEST access to FPROD is available – after transactional processing go-live
- Review automated scripts (they will not work during the upgrade window)
- Notify appropriate resources

PSQUEST Password Changes

- PSQUEST passwords will be changed with the upgrade.
- An announcement will be posted when the new passwords are available.
- Contact the ITS Helpdesk to request the new password.
- **Current passwords are good until Thurs 12/12**

User Acceptance Testing Recap

UAT Recap

Issues that were identified:

- The famous “Can’t log in” – firewall issue
- Browser related issues (ePro requisitions, etc.)
- Miscellaneous errors that were resolved by reboot of app servers and clearing of cache
- AM Depreciation Calculation Process – PS Known Issue, fix had to be applied

UAT Recap

Issues that were identified (continued):

- Two-tier connection (PSQUEST) issues – firewall setting
- Different version of Crystal Report in FUAT than current production – path to BOR modified Crystal reports incorrect

Performance Testing

- Completed performance tests as part of system testing to gather baseline timings and identify substantial performance differences.
- Completed performance testing in upgraded test database on production hardware with limited institutional involvement last week.
- Request for testers from all institutions to performance test Thursday (2:00-4:00pm).

Cutover Planning and Expectations

Cutover Planning and Expectations

- Transactional entry and processing must be completed **by Noon** on Thursday, December 12.
- Very important – be sure you obtain all files and reports from process monitor (*files will not be available in the new production database*)
 - Print all checks and save all bank files for submission to your bank.

Cutover Planning and Expectations

Things to do to prepare for downtime:

- Review business calendar
 - Schedule for student disbursements, upcoming vendor payments, orders needed for upcoming new semester.
 - Establish internal deadlines (ePro/GFM requisitions, Banner processing, employee reimbursements, etc.)

Cutover Planning and Expectations

Things to do to prepare for downtime (cont.):

- Communicate System Downtime
 - GeorgiaFirst Marketplace Shoppers & Requesters
 - Employees using Expenses Module
 - Campus stakeholders (Registrars, Departmental users, third-parties, etc.)

Cutover Planning and Expectations

Things to do to prepare for downtime:

- Participate in WebEx Conference calls:
 - Wednesday, December 4th – Foundations Upgrade Status and Application Upgrade Fit/Gap Planning
 - Tuesday, December 10th – Final Cutover Details
 - Monday, December 16th – Go Live Validation (Cutover Coordinators)

Cutover Planning and Expectations

- Institutional Tasks and Responsibilities Checklist
 - Includes due dates
 - Will be distributed to listservs and available on GeorgiaFIRST website by end of this week

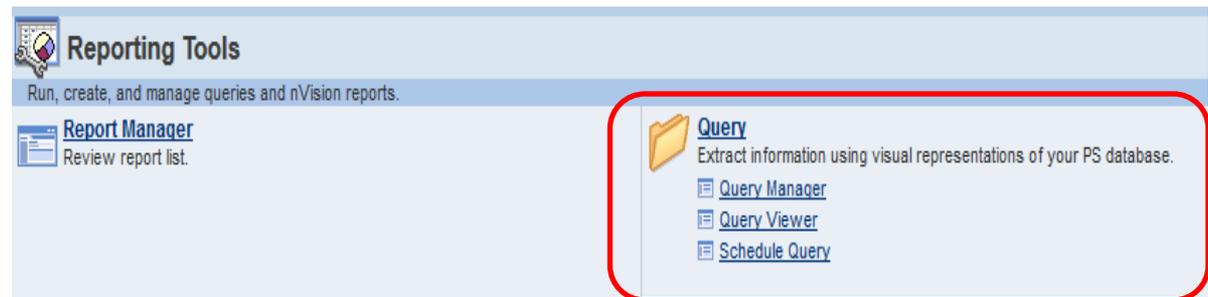
Cutover Planning and Expectations

- Cutover Coordinator Role
- Cutover Coordinator Responsibilities
 - Identify and coordinate validation resources on campus
 - Participate in WebEx conferences (Go Live Validation WebEx Monday, December 16th)
 - Communicate system availability after validation
 - Return Go Live Validation sign-off by 5:00pm on December 16th to ITS

Reporting Solution Changes and Final Query Review

Reporting Solution Access

- Navigation change to Queries:



Note that the **BOR Reporting Instance** and **Schedule Query** Menu items are no longer listed.

Final Query Review

Final round of query cleanup should be underway now.

- New spreadsheets were distributed 11/19/2013
- Institutional deadline for completion:
Noon, December 12th

Password Controls

Password Controls

- Being changed to conform to audit and ITS requirements
- Password control changes:
 - History must be different for 8 consecutive passwords
 - 10 characters in length
 - Minimum 2 numeric characters and 1 upper case letter

Password Controls

- New password controls were tested in UAT
- ITS will implement in production with PT8.52 Upgrade
- **Impact to users:**
 - **All end users will be forced to change their password upon initial login following the upgrade**
- Institutions need to communicate this change to all PeopleSoft users

Helpdesk Communications

Helpdesk Communications

- Stay in the Communication Loop
 - http://www.usg.edu/customer_services/documents/Stay_in_the_Communications_Loop_022013.pdf
- USG Service Status Website
 - <http://status.usg.edu>
 - RSS feeds
 - Twitter

Helpdesk Communications

- Service Information Message (SIM)
 - Call 706-583-2001, 888-875-3697
 - Select menu option 2
- More information:
 - http://www.usg.edu/customer_services/info/ecs.phtml

Helpdesk Communications

- ITS Helpdesk
 - helpdesk@usg.edu
 - 706-583-2001, 888-875-3697
 - Self-service
http://www.usg.edu/customer_services/ (requires user ID)

Q & A

Please submit your questions via the chat function now.

Wrap Up

- Recording and slides made available tomorrow
- Thank you for participating!