

## PeopleSoft Financials Foundations Upgrade Status Overview

Thursday, December 5<sup>th</sup> from 2:00 – 2:30 p.m.

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The PeopleSoft Financials Foundations Upgrade Status Overview webconference was held on Thursday, December 5<sup>th</sup> from 2:00 – 2:30 p.m.

In this webconference, the GeorgiaFIRST Team shared important information about the upcoming PeopleTools upgrade.

The agenda included:

- Upgrade Preparation Reminders
- Banner Integration Reminders
- Password Controls Reminders
- Impact to Self-Service Portal, GeorgiaFIRST Marketplace, iStrategy, and FDM
- Database Availability
- Preview of Release 3.10 and 1099 Fix
- Preview of Final Cutover Webconference on Tuesday, December 10<sup>th</sup>
- Q&A

To View the Archive

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Go to this link:

<https://borusg.webex.com/borusg/lr.php?AT=pb&SP=EC&rID=19432087&rKey=c02d80ab43390088>

Slides from the presentation are available on the following pages.



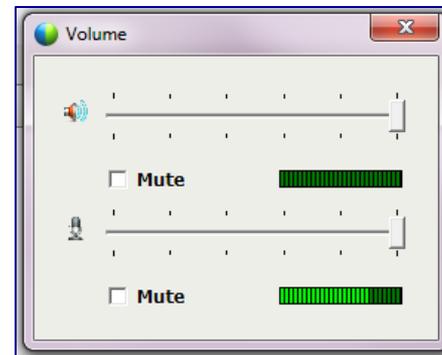
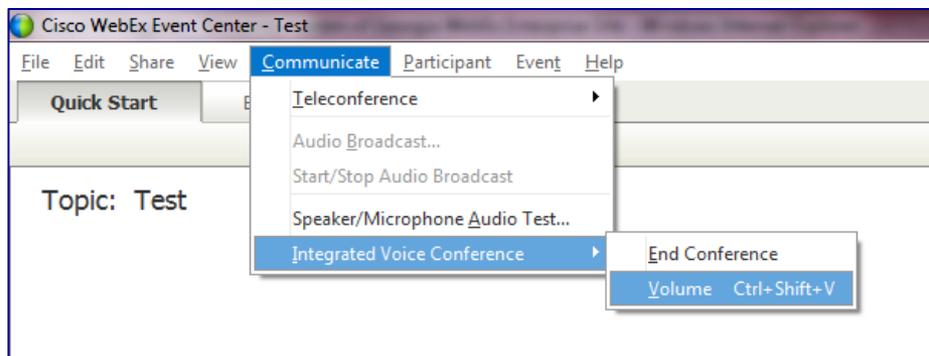
# Foundations Upgrade Status Update

GeorgiaFIRST Team

December 5, 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:

**(646) 307-1300, access code 9759227**

# WebEx Housekeeping

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- Submit questions via the chat function to all participants
- Recording and slides will be available tomorrow

# Agenda

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- Upgrade Preparation Reminders and Institutional Readiness Checklist
- Banner Integration Reminders
- Password Controls Reminders
- Impact to Self-Service Portal, GeorgiaFirst Marketplace, iStrategy, and FDM
- Database Availability
- Preview of Release 3.10 and 1099 Fix
- Preview of Final Cutover WebEx on Tuesday, December 10th

# Upgrade Preparations

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- Review business calendar and establish internal deadlines
- Communicate, Communicate, Communicate
  - We will cover in later slides
- Confirm Cutover Coordinator for your institution. See list on GeorgiaFIRST website:
  - [http://www.usg.edu/gafirst-fin/project information/peopletools 8.52 upgrade](http://www.usg.edu/gafirst-fin/project%20information/peopletools%208.52%20upgrade)
  - Contact [donna.wooddell@usg.edu](mailto:donna.wooddell@usg.edu) with changes

# Upgrade Preparations

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- Cutover Coordinators should participate in Institutional Readiness WebEx Tuesday, December 10<sup>th</sup>.
- Complete final campus query cleanup in F89RPT Reporting Instance.
- Refer to the Checklist sent out Monday, November 25<sup>th</sup> located on the GeorgiaFIRST Upgrade Project website at [http://www.usg.edu/gafirst-fin/project\\_information/peopletools\\_8.52\\_upgrade](http://www.usg.edu/gafirst-fin/project_information/peopletools_8.52_upgrade)

# Banner Integration Reminders

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## Announcements

[http://www.usg.edu/gafirst-fin/project\\_information/peopletools\\_8.52\\_upgrade](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

# Banner Integration Reminders

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- Link from Banner to PeopleSoft:
  - Use the scripts provided
  - Contact the ITS Helpdesk for the password
- Firewall
  - You need an IP address and Host Name
    - Contact the ITS Helpdesk

# Banner Integration Reminders

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- Testing:
  - FPLAY is available today for connecting your Banner Test
- Production:
  - 7:00 am to 9:00 am Monday, December 16
- **DOWNTIME: Plan for and Notify resources**  
12:00 pm THU 12/12 to 9:00 am to MON 12/16

# Password Controls Reminders

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- As part of the PT8.52 upgrade, new password controls and user access requirements for the PeopleSoft Financials application will be implemented.
- Password controls are changing in order to conform to audit and ITS security requirements.
- All users (both core users and self-service users) will be forced to change their passwords upon initial login after the cutover.

# Password Controls Reminders

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- Requirements for these new passwords are:
  - At least 10 characters in length
  - Must contain at least 2 numeric characters and 1 upper case letter
  - Allowable special characters are any of the following:
    - ! @ # \$ % ^ & \* ( ) - \_ = + \ | [ ] { } ; : / ? . > <
  - Password history must be different for 8 consecutive passwords
  - User will be locked out after 5 unsuccessful login attempts
- Institutions should communicate these new password requirements to all end users.

# Impact to Self-Service

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- ITS will take down the PeopleSoft Self Service Portal as of Wednesday, December 11<sup>th</sup> at 5:00 pm.
- Expense and GeorgiaFirst Marketplace transactions can still be entered through the core portal until Thursday, December 12<sup>th</sup> at 12:00 pm.
- The Self Service Portal will be available following the upgrade cutover validation on Monday, December 16<sup>th</sup>.

# Impact to GeorgiaFirst Marketplace

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- The GeorgiaFirst Marketplace will be unavailable for the duration of the PeopleTools 8.52 Upgrade system downtime.
- Will become available following the upgrade cutover validation on Monday, December 16<sup>th</sup>.

# Impact to iStrategy

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- The iStrategy application will remain up and available throughout the Upgrade and the system downtime.
- However, the data available in the reports will be as of Wednesday, December 11<sup>th</sup> and will not be updated until the upgrade cutover is validated on Monday, December 16<sup>th</sup>.
- After that time, all iStrategy data will be updated on Tuesday, December 17<sup>th</sup> with data from Monday, December 16<sup>th</sup>.

# Impact to FDM

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- FDM will remain up throughout the upgrade.
- However, Institutions nor USO should not attempt to submit, edit or accept FDM submissions during this time (12/12 to 12/16) since production will be down.
- An announcement will be sent out to the USG123 listserv and posted to the GeorgiaFIRST website next week.

# Database Availability

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Access will be removed at 2:00pm Thursday, December, 12<sup>th</sup> to the following:

- F89PRD current production
- F89RPT Reporting instance
- F89PLAY
- F89UAT

# Database Availability

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Databases that will remain available during the Upgrade (12/12 to 12/16):

- SCITEST – old PT8.48 GFM database
  - This database will be taken away 12/31/2013
- SCITEST2 – new upgraded PT8.52 GFM database
- HSTPRD

# Database Availability

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Available Monday, 12/16:

- FPROD – Monday, 12/16 (new production)

Available at a later date (TBD)

- FPLAY – replaces F89PLAY
- FUAT – only used for User Acceptance Testing  
(Institutions should use FPLAY for local campus training)

A list of the new URL's will be provided to the Cutover Coordinator for validation and posted to the GeorgiaFIRST website following the upgrade.



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# Other Georgia*FIRST* Financials Updates

# Changes/Fixes included in Upgrade

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- Fix for BOR\_AP\_UNPOSTED\_VCHR query
- Fix for BORBU8F2 Budget Prep Export HR/Payroll page and report
- Fix for BORRG042 Budget Progress, BORRG045 Budget Activity and BORRG046 Grant Budget Activity Reports
- Fix for BOR\_FSA\_BAL query

# Changes/Fixes included in Upgrade

- Six new Asset Management Queries released
  - Will allow users to validate that various AM process have run correctly
- Monthly AM Processing Checklist and AM Tip Sheet
  - Posted to assist users in AM entry and processing

Details on changes and fixes will be included in Release Notes posted next week.

# Release 3.10 and 1099 Fix

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- Tentatively Scheduled for December 21<sup>st</sup>
- Planned fixes/changes:
  - CY2013 1099 IRS Changes
  - New PPV nVision Report
  - BOR\_KK\_EXCEPTIONS query
- 1099 Processing Users Guide will be updated and an announcement will be sent out when it is available.

# Calendar Year 2014 Changes

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- CONUS/OCONUS Updates (Expenses)
- New FSA Accounts
- Updating Combo Edit Rules FSADEPT & FSAPROJ
- Updating Journal Generator Template PAYROLL\_EX
- New FSA Expense Types & Workflow routing updated
- An Announcement will be sent out

# Cutover Week

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- WebEx on Tuesday, December 10<sup>th</sup> at 11:00AM
- Will review activity to be completed on Thursday, December 12<sup>th</sup> prior to upgrade beginning
- Will review the institutional validation steps so Cutover Coordinator can identify additional resources that will need to participate.

# Q & A

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Please submit your questions via the chat function now.

# Wrap Up

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