

PeopleTools Version 7.62 Upgrade Notice

Sent on September 16, 2002.

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Audience

This notice is directed to the technical support staff responsible for deploying PeopleSoft file server and workstation software on your campus. Please forward this notice accordingly.

Issue

The GaFirst projects will be implementing a mandatory PeopleSoft upgrade to PeopleTools version 7.62 on the evening of October 10. This upgrade will require the installation of a PeopleTools upgrade to every file server and workstation where PeopleSoft is implemented on your campus. This upgrade will have a greater impact on campus technical resources (personnel and hardware) than the usual PeopleSoft update and campus IT staffs should plan accordingly. This notice is meant to give the campus technical support staffs an overview of the issues involved with this upgrade. Specific software installation instructions will be distributed later this month.

Technical Summary

This PeopleTools upgrade to version 7.62 is required for all installations of PeopleSoft HR and PeopleSoft Financials. The upgrade will synchronize the PeopleTools version across PeopleSoft HR and PeopleSoft Financials and it will put in place some of the prerequisites for the PeopleSoft Financials Service Pack 2 upgrade that will be implemented in November. More information about the rollout of Service Pack 2 will be forthcoming.

This upgrade to version 7.62 will require the installation of new client workstation components on every PeopleSoft workstation, plus the installation of new file server components on every file server that is part of a PeopleSoft installation. If a client workstation is running both PeopleSoft HR and PeopleSoft Financials, the upgraded workstation components for each package will need to be installed on each workstation. There will be entirely new installers for both PeopleSoft HR and PeopleSoft Financials. There will be new installation documentation for both the file server and workstation components. In the interests of caution and system integrity this upgrade should be performed as a migration, where the current version of PeopleTools components (on the file server) is retained until the migration to the

new version is complete. There are many factors to be considered in planning and implementing this upgrade on your campus.

Technical Details and Planning

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To adequately plan for this upgrade you need to know about the dependencies of the software components, the timeline for the changes in the PeopleSoft system that will be happening remote from your campus, and be aware of the factors on your campus that are critical to the implementation.

Versions and Dependencies

The PeopleSoft system runs in a "three tier" model. The first tier resides on your campus and consists of the client workstation running Client PeopleTools and the LAN file server where the software is stored. The second tier is remote to your campus and consists of an application server running Application Server Tools. The third tier is also remote to your campus and consists of the Oracle database server. CRITICALLY, the software versions of the first tier (Client PeopleTools) and the second tier (Application Server Tools) *must match* in order to establish a connection between the two. Without this match in versions between the first and second tier "Tools", no PeopleSoft end user work can take place.

Currently the Client PeopleTools and Applications Server Tools are synchronized at the following version numbers:

- PeopleSoft HR, version 7.59
- PeopleSoft Financials, version 7.60

After the upgrade the Client PeopleTools and Applications Server Tools must be synchronized at the following version numbers:

- PeopleSoft HR, version 7.62
- PeopleSoft Financials, version 7.62

Upgrade Events Timeline

Pre-Upgrade

- Friday, October 4, 5pm.
- Upgrade installers for PeopleSoft HR will be available for download.
- Upgrade installers for PeopleSoft Financials will be available for download.

- Test Environment for testing the upgrade (consisting of an upgraded Application Server and test "play" database: HPLAY75 for HRMS and FPLAY for Financials) available.
- Production Environments are still running at version 7.59 (HR) and 7.60 (Financials).

Upgrade

- Thursday, October 10, 6pm until Friday, October 11, 7am.
- Production Environment for PeopleSoft will be offline.
- Upgrade to version 7.62 of Applications Server Tools for PeopleSoft HR and PeopleSoft Financials will take place.

Post Upgrade

- Friday, October 11, 7am.
- Production Environments for PeopleSoft will be at version 7.62 *only*.
- Production Environments for PeopleSoft will be online.
- Applications Servers for PeopleSoft HR and PeopleSoft Financials will be running Tools version 7.62.

Critical Campus Factors

Detailed installation instructions will accompany the software upgrade and will be distributed via the USG PeopleSoft mailing lists prior to October 4. What follows here is a listing of critical factors to consider in planning the implementation on your campus.

Impact on technical support staff. Since the workstation of every PeopleSoft user will have to be "touched", this upgrade will have a greater impact on campus technical personnel than the usual file server only PeopleSoft updates.

File server configuration and disk space. In the interest of caution and system integrity this upgrade should be performed as a migration, where the current version of PeopleTools residing on your fileserver is retained until the migration to the new version is complete. This will reduce the amount of time needed to "fall back" to the pre-upgrade version in the event of unforeseen problems. Thus you will need to duplicate *and* backup the current PeopleSoft file server structure (the "usg" share) prior to installing the upgrade. This may require up to 1GB of free disk space (conservative estimate, just to be safe) over and above your current installation of PeopleSoft file server components. After a successful implementation to all users, the duplicate (original) directory structure can be deleted from the file server.

Oracle components on the fileserver. The PeopleTools 7.62 components will not disturb or affect any Banner components that reside on the file server or client workstation if you are using the USG installer for Banner5. If your campus does not use the USG installer for Banner5 you will need to take the same precautions as were needed for the previous version of PeopleTools. If you already have an Oracle directory used for your current PeopleTools or the USG version of Banner5 you can continue to use this. The PeopleTools 7.62 upgrade will not change the Oracle directory nor the components in the Oracle directory as installed by the USG installer for Banner5.

Workstation configuration. Every PeopleSoft workstation on your campus will have to be touched as part of this upgrade. You will have to uninstall the old version and install the new version of PeopleSoft components. On workstations where both PeopleSoft HR and PeopleSoft Financials are installed, you will also have to configure the "PSSwitcher" application after installation. The amount of disk space used on the workstation should not change substantially with the upgraded components.

Required end user installer participation. You cannot correctly install the workstation components of PeopleSoft without the participation of the PeopleSoft end user. Any PeopleSoft install on a workstation (not just this upgrade) writes critical information to the HKEY_CURRENT_USER section of the Windows registry. This requires that 1) the PeopleSoft end user must be logged in as the current user on the workstation when the installer is run, and 2) that same end user's account must have administrator rights to that local workstation. You as a network administrator cannot successfully install PeopleSoft on a workstation for any user but yourself.

End user involvement in testing. You will need to schedule the time of PeopleSoft end users -- both HR and Financials -- to verify that the upgrade is working correctly *before* installing it generally on all client workstations. If you are serving Banner components on the same file server where the PeopleTools upgrade will be installed we highly recommend that you also schedule the time of a Banner end user to verify proper functioning of the Banner system after the upgrade.

Scheduling of workstation installations. The workstation upgrade should be installed and tested against the PeopleSoft Test Environment (upgraded test "play" database: HPLAY75 for HRMS and FPLAY for Financials) prior to October 11. But remember the version dependencies discussed above? If the 7.62 upgrade is installed on a

user's workstation prior to October 11, that workstation will no longer be able to access the production PeopleSoft application. Conversely, after October 11, users that have not had their workstations upgraded will no longer be able to access their production database. To reduce the pressure to get all workstations installed overnight on October 10, you may consider installing the upgrade prior to October 11 on the workstations of "non-mission-critical" PeopleSoft users. You might also consider asking those same users to avoid using PeopleSoft on October 11 thus giving your campus support staff all of Friday, October 11 and the weekend to perform those installations.

Scheduling of file server installations. The file server upgrade should be downloaded and tested prior to October 11. The file server upgrade should not be placed in production until October 11. If the file server upgrade is placed in production prior to October 11, PeopleSoft users of that file server will no longer be able to access the production PeopleSoft application. Conversely, after October 11, users relying on a file server where the upgrade is not in production will no longer be able to access their production database.

Questions?

If you have any questions or need additional information please notify the helpdesk by email at or by phone at 1-888-875-3697.