

PeopleTools version 7.62 upgrade notice

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Issue

The GaFirst projects have planned a mandatory upgrade to the PeopleTools client software the week of October 7. The file server piece for this upgrade will be made available on October 4. On October 10 your databases will come down at 6:00 pm so we may begin updating your databases. Your databases will be available again the morning of October 11. This upgrade will synchronize the PeopleTools version across PeopleSoft HR and PeopleSoft Financials. This update will also prepare your campus for the PeopleSoft Financials Service Pack 2 upgrade that will be implemented the weekend of November 22. Service Pack 2 will provide improved functionality for the financials application. More information about the rollout of Service Pack 2 will be published in September. This tools upgrade is required for all installations of both PeopleSoft HR and PeopleSoft Financials. This upgrade is also a prerequisite for PeopleSoft Financials Service Pack 2. The upgrade will have a greater impact on campus technical resources (personnel and hardware) than the usual PeopleSoft updates.

General details

The upgrade of PeopleTools 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 workstation components for each will need to be installed. 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 you are using your own method of delivering Banner to your users you will need to take the same precautions as were needed for the previous version of PeopleTools.

Technical Details

This upgrade will change the PeopleTools components on both the file server and the workstation. It will not change the Oracle components. In the past the web site has offered an installer "with Oracle" and without to save you time during the download. The Oracle directory

will not change. If you already have the Oracle directory used for your current PeopleTools or the USG version of Banner5 you can continue to use this.

In the interest of caution and system integrity this upgrade should be performed as a migration where the current version of PeopleTools is retained until the migration to the new version is complete. What follows are the basic steps of the upgrade/migration. Specific upgrade instructions will be provided with the release of the installer in October.

- The fileserver components of your existing PeopleSoft installation (the directory tree under the "USG" fileserver share) will need to be duplicated (and backed up) prior to the installation of the new components
- Download **both** the HR and Financials new versions from the web to a "new" USG directory structure. Ex. USGNEW
- Copy your current Banner and Oracle directories from the "old" (duplicated) USG folder into your "new" USG folder. An installer containing Oracle directory structure along with the HR and Financials directories can be downloaded. The Oracle\806\orant or orawin95 directories are NOT changing.
- The fileserver upgrade should then be applied against other PeopleSoft fileserver directory structures if needed.
- You will then need to proceed with an upgrade of a client workstation, test it thoroughly and then roll it out to all your PeopleSoft workstations. We will make a "play" database available to you to test the installation.

**** IMPORTANT ** Although the file server install will be made available on October 4th, several days prior to the actual upgrade of the database on October 10th, it should only be downloaded and tested until the database upgrade actually occurs. If installed on a users' workstation prior to October 11, that user will no longer be able to access the PeopleSoft application. Conversely, after October 11, users that have not had their workstation upgraded will no longer be able to access their production database.**

After a successful rollout, the older original directory structure can be deleted from the file server. If any problems are detected during the test period, you will have the option of "rolling back" to your previous fileserver installation with minimal interruption of services to end users.

Campus technical staff will have to decide whether to perform this migration for all users at once (requiring a declared downtime during which all PeopleSoft workstations attached to a file server must be logged off until testing is complete) or one user at a time (share both the original USG tree and an upgraded tree and moving users one at a time by using a new drive mapping on each upgraded client workstation)

**** REMEMBER ** the PeopleSoft user MUST be logged in to the workstation when the workstation tools upgrade is taking place! They must also have appropriate rights to be able to install software on their workstation!**

The fileserver upgrade components will require approximately 1GB (over-estimate, just to be safe) of free disk space. After the completed upgrade the new directory should be approximately the same size as your current USG directory structure. The size of the workstation install is negligible.

Planning

There are three key issues to consider in planning for this upgrade.

- First, your technical staff will need to make sure that there is adequate disk space for installation on each file server where the upgrade will be installed.
- Second, every PeopleSoft workstation will have to be "touched" to complete this upgrade. On campuses where there are large numbers of PeopleSoft client workstations, there will be a correspondingly large impact on the local desktop support personnel and campuses should plan accordingly.
- Third, for the testing phase of the installation you will need to schedule the time of PeopleSoft end users -- both HR and Financials -- to verify that the upgrade is working correctly *before* rolling it out to all client workstations.

Note: 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.

If you have any questions of need additional information please notify the helpdesk @ helpdesk@usg.edu or 1-888-875-3697.