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/lr.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 22\textsuperscript{nd} – Thursday, January 23\textsuperscript{rd}
  – Budget Prep (3 days)
    Tuesday, January 28\textsuperscript{th} – Thursday, January 30\textsuperscript{th}

• WebEx scheduled early January with details
Upgrade Related Documentation

GeorgiaFIRST Financials

PeopleTools 8.52 Upgrade (Fall 2013)

Cutover Dates: December 12th - December 16th

Communications and Resources

- Cutover Coordinators
- Institutional Tasks and Responsibilities Checklist
- Security Access and Password Controls
- Impact to Self Service, GeorgiaFIRST Marketplace, and iStrategy

Technical Instructions

- Start Here
- 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 GeorgiaFIRST 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 register by close of business Thursday (December 12)
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).

• GeorgiaFIRST 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
  – GeorgiaFIRST 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 - Institutions establish Banner link.
- Monday, December 16 at 9:00am - Cutover Coordinator participates in Go-Live Validation WebEx.