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. 16\textsuperscript{th}. 
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

<table>
<thead>
<tr>
<th>Date</th>
<th>Timeframe</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday 12/12</td>
<td>Noon</td>
<td>Institutions complete all Financials processing</td>
</tr>
<tr>
<td>Thursday 12/12</td>
<td>Noon – 2pm</td>
<td>Queued processing will be allowed to run. (processes within the process monitor at 12pm will be allowed to run to completion)</td>
</tr>
<tr>
<td>Thursday 12/12</td>
<td>2pm</td>
<td>ITS removes institutional access to Production</td>
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<tr>
<td>Thursday 12/12</td>
<td>2pm</td>
<td>ITS runs BORDAILY batch job</td>
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<td>• Upon completion, ITS runs institutional validation queries and reports and prepares final steps to prepare database for ITS DBAs.</td>
</tr>
<tr>
<td>Thursday 12/12</td>
<td></td>
<td>ITS upgrade activities begin</td>
</tr>
<tr>
<td>Monday 12/16</td>
<td>7am – 9am</td>
<td>Establish Banner links</td>
</tr>
<tr>
<td>Monday 12/16</td>
<td>9am</td>
<td>Validation of new Production environment</td>
</tr>
</tbody>
</table>
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 compatibility 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 4\textsuperscript{th} – Foundations Upgrade Status and Application Upgrade Fit/Gap Planning
  – Tuesday, December 10\textsuperscript{th} – Final Cutover Details
  – Monday, December 16\textsuperscript{th} – 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

• USG Service Status Website
  – [http://status.usg.edu](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!