PeopleSoft Financials Foundations Upgrade Status Overview

Thursday, December 5th from 2:00 – 2:30 p.m.

The PeopleSoft Financials Foundations Upgrade Status Overview webconference was held on Thursday, December 5th 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 10th
- Q&A

To View the Archive

Go to this link:  
https://borusg.webex.com/borusg/lsr.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

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

• 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

• 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_information/peopletools_8.52_upgrade)
  – Contact donna.wooddell@usg.edu with changes
Upgrade Preparations

- Cutover Coordinators should participate in Institutional Readiness WebEx Tuesday, December 10th.
- Complete final campus query cleanup in F89RPT Reporting Instance.
- Refer to the Checklist sent out Monday, November 25th located on the GeorgiaFIRST Upgrade Project website at http://www.usg.edu/gafirst-fin/project_information/peopletools_8.52_upgrade
Banner Integration Reminders

Announcements

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

• 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

• 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

• 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

• 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

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

• 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 16th.
Impact to iStrategy

• 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 11th and will not be updated until the upgrade cutover is validated on Monday, December 16th.

• After that time, all iStrategy data will be updated on Tuesday, December 17th with data from Monday, December 16th.
Impact to FDM

• 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

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

• F89PRD current production
• F89RPT Reporting instance
• F89PLAY
• F89UAT
Database Availability

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

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.
Other GeorgiaFIRST Financials Updates
Changes/Fixes included in Upgrade

- 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

• Tentatively Scheduled for December 21\textsuperscript{st} 
• 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

- 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

- WebEx on Tuesday, December 10\textsuperscript{th} at 11:00AM
- Will review activity to be completed on Thursday, December 12\textsuperscript{th} prior to upgrade beginning
- Will review the institutional validation steps so Cutover Coordinator can identify additional resources that will need to participate.
Q & A

Please submit your questions via the chat function now.
Wrap Up

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