



Foundations Upgrade Institutional Readiness

GeorgiaFIRST Team
December 10, 2013

WebEx Housekeeping

- Audio and volume adjustment

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 22nd – Thursday, January 23rd
 - Budget Prep (3 days)
Tuesday, January 28th – Thursday, January 30th
- WebEx scheduled early January with details





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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

- 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





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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.



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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.



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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 Firew(/u)C /Lbp



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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
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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







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.
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Q&A
