Finance System Leadership Group Meeting Minutes
June 28, 2012

Attendees: Christopher Burton, Cathy Bye, Tony Carpenter, Jean Carr, Catherine Chan, Mike Chang, John Cordary, David Ellis, Mike Glisson, Debbie Jozwiak, Arlene Lockwood, Keith Martin, Gretta McClain, Theresa Meneley, Shabana Mohiuddin, Darlene Pullin, Tracey Shipper, Lara Umberger, Val Walden, Samantha Yurus

Status and Schedule of Upgrade to 9.1

- Mike Glisson forwarded a list of outstanding tasks related to upgrade testing to the group prior to the meeting.
- The group decided that the upgrade should occur December 6-11 as follows:
    - Close period 3 (November) on Thursday, December 6.
    - Remove user access to FSPRD at 5 PM on December 6 and begin the upgrade.
    - Provide a Reporting Database for users to view (not update) finance information during the upgrade.
    - Complete the upgrade pass and retrofits by Monday, December 10 with enough time for functional users to perform limited testing to verify the upgraded database appears to be working okay.
    - Make the upgraded database available to all users at 7 AM on Tuesday, December 11.
- Enhancements to the current production database (8.4) are on hold to allow adequate time for upgrade testing and retrofits. ES is working on requested fixes (soft commitment errors, etc.) to 8.4 FSPRD submitted through a CSR.
- Functional leaders should review all outstanding tasks in Sharepoint on a daily basis and update them as needed, so that everyone knows which tasks are completed, need additional functional testing, or need technical work.
- ES will plan a dress rehearsal upgrade pass, including applying retrofits, in a few weeks. Mike Chang will notify the group when this occurs.
- We will also do load testing to determine how the upgraded system performs with a higher volume of activity. ES will run some scripts of common tasks (not processes), such as looking up a voucher, while functional users run some processes (reports, etc.) at the same time. Functional users will help write the scripts, which are step-by-step instructions for performing the task.
- We will also perform batch testing of transactions from the HR and Student Systems.
- All vouchers must be posted prior to the upgrade, according to PeopleSoft upgrade documentation. Samantha Yurus will review unposted vouchers in 9.1 Test to determine if they can be used.
- End user training for the upgrade will occur between Thanksgiving and the upgrade (November 26 – December 10).

Next Meeting

Mike Glisson will schedule another meeting for August 2 at 3 PM to review our progress on upgrade testing.