

Financial System Leadership Group Meeting Agenda  
June 8, 2009

Attendees: Jean Carr, Catherine Chan, Mike Chang, John Cordary, David Ellis, Margie Hattenbach, Mike Glisson, Karin Livingston, Keith Martin, Theresa Meneley, Val Walden

UHS Finance Upgrades – Keith Martin handed out a proposed upgrade schedule for phases 1 and 2 below. He will update the schedule based on our discussion and distribute it to the group. Key points for each phase of the upgrade are summarized below.

Phase 1 - Upgrade database engine from Oracle 9i to Oracle 10g

- The upgrade to Oracle 10g should have no impact on Finance processing, other than possibly improving performance (e.g., response time for running queries, reports, processes, and accessing pages).
- FSTST (test database) was upgraded to Oracle 10g on June 5. FSTST can be accessed at <https://dev.my.uh.edu:8131/>
- The functional group should run their usual reports (1074, 1060, etc.), queries, processes (including budget checking), and access frequently-used pages in FSTST between June 8 and June 18 to verify there are no problems associated with the upgrade.
- Those who want to compare the speed of the upgraded FSTST to FSSBX (sandbox database), which has not been upgraded, can access FSSBX at <https://dev.my.uh.edu:8122/> FSSBX is updated from FSPRD every Friday morning. FSTST was last updated from FSPRD on February 5, 2009, which means your password and the data in FSTST is the same as FSPRD as of February 5 plus whatever data has been added through testing/training.
- Mike Chang will request a “Go/No-Go” decision from the Financial System Leadership Group on Thursday, June 18 at about 4 PM for upgrading the FSPRD (production database) to Oracle 10g.
- If there are no objections, FSPRD will be upgraded to Oracle 10g on Sunday, June 21.

Phase 2 - Upgrade PeopleTools from 8.45 to 8.49

- The upgrade to PeopleTools 8.49 is expected to affect workflow, nVision reports (drill-down feature), and integration broker (sends data between Finance and HR/Student) primarily, though all frequently-used reports, processes, and pages should be tested.
- FSSBX2 (sandbox database 2) has been upgraded to Oracle 10g and PeopleTools 8.49. However, the technical group needs to do some work in FSSBX2, which they hope to complete by July 1, before it is released to the functional group for testing.
- When the technical group has finished working on FSSBX2 (hopefully by July 1), Mike Chang will notify the functional group to begin testing in FSSBX2 with the goal of completing this testing by Thursday, July 23. FSSBX2 was last updated from FSPRD on January 5, 2009.
- Mike Chang will request a “Go/No-Go” decision from the Leadership Group on July 23 at about 4 PM for upgrading the FSDEV (development database) to PeopleTools 8.49.

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- If there are no objections, FSDEV will be upgraded to PeopleTools 8.49 on July 24 and the technical group will perform setup and testing in FSDEV from July 27 to July 30.
- Assuming setup and testing are successful, FSTST will be upgraded to PeopleTools 8.49 on Friday, July 31.
- On August 3, Mike Chang will notify the functional group to begin testing in FSTST to confirm that frequently-used reports, processes, and pages are working, especially workflow, nVision reports, and any processes/pages that had problems in FSSBX2. Since the functional group previously tested in FSSBX2 and all changes in FSSBX2 will be migrated to FSTST, it should not be necessary to perform as extensive amount of testing in FSTST.
- Mike Chang will request a “Go/No-Go” decision from the Leadership Group on Thursday, August 6 at about 4 PM for upgrading FSPRD to PeopleTools 8.49.
- If there are no objections, FSPRD will be upgraded to PeopleTools 8.49 on Sunday, August 9.
- Note 1: The above dates for upgrading to PeopleTools 8.49 could change if unforeseen problems are encountered that require more time to correct. The goal is to complete the upgrade after July (period 11) closes and before we get too late into August.
- Note 2: From the time that FSDEV is upgraded to PeopleTools 8.49 to the time that FSPRD is upgraded (from July 24 to August 9 in the above timetable), it may not be possible to make major modifications to FSPRD, because mods migrated from FSDEV to FSPRD need to have the same version of PeopleTools. The technical group can work around this limitation, if it becomes necessary.

Phase 3 – Upgrade UHS Finance application from 8.4 to 9.0

- The upgrade of the Finance application to 9.0 will require extensive setup, retrofitting, and testing. Though there are not as many changes as when we upgraded from 7.5 to 8.4, there are still significant changes that need to be tested.
- The technical group will work on identifying customizations and needed retrofits.
- The technical group plans to have an upgrade database with UHS customizations and data ready for testing by late fall 2009.
- The goal is for the Budget Office to perform its FY11 budget cycle testing (which begins as early as December 2009) in the upgrade database, and to complete the upgrade to 9.0 in FSPRD before the budget cycle begins in March 2010.
- The number of days required to perform the upgrade and when it might be performed will be determined later after we have performed some testing.