

# PSFIN V8 Upgrade Status Report

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**Week Ending: March 9, 2007**

## **Significant Decisions Made Since Last Report**

- **Upgrade**
  - Test Move 2 will be done with no assistance from Functional so they can focus on priority tasks
- **Communications**
  - Institutional Readiness Meeting for April will not be held via web conference. Instead it will be held in Macon at the April Quarterly Update Meeting.
  - Quarterly Update Meeting dates have been scheduled through November 2007 and facilities are reserved.
  - The April 16 Quarterly Update Meeting will not contain breakout sessions and will not have technical discussions on the agenda. We will not have technical details ready by then. The Quarterly Meeting in August will be strictly a technical update meeting for technical representatives.
- **Functional**
  - Pending data in GL and sub-modules from prior (closed and audited) fiscal years will be left in it's current state with the exception of a new status code. The status code will indicate to users and auditors that this data was converted from 7.5 and relates to closed/audited fiscal years.

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## Significant Accomplishments Since Last Report

- **Overall**
- **Upgrade**
  - A run through on FUPG03 was completed and cloned into FDEV01 since the data was “cleaner” than the Test Move 1.
  - The 8.9 PSHOME and other files were zipped and placed on the share drive to be FTP’d to Oracle for MCG.
  - Test Move 2 has begun with a copy of FOS01 (prepped Augusta), and copies of production from Fort Valley, Kennesaw and Georgia Southern.
  - Upgrade Sub-team is done with the use of the FOSxx environments.
- **Development**
  - Integration Broker is now working between an HR and PSFIN system. Personal Data and Banking data have been exchanged successfully between the systems.

Status of all Design Specifications in Development:

Overall	Received	Not Started	In Progress	Returned to Functional	Ready for Development	Development/ Unit Test	Ready for System Test
AM Specs	15	0	0	0	10	1	4
AP Specs	14	1	3	0	9	0	1
AR Specs	0	0	0	0	0	0	0
BP Specs	27	1	9	0	6	4	7
EXP Specs	5	0	1	0	0	3	1
GL Specs	45	21	8	0	12	0	4
PO Specs	12	0	0	1	7	0	4
EPro Specs	1	0	1	0	0	0	0
	119	23	22	1	44	8	21

- **Architecture**
  - The Architecture sub team is currently going through the design process for defining the application architecture for PSFIN V8. We’re currently working on Weblogic Managed Web servers and NT Batch Server sizing.
  - UPK Development Server Build is in our hands to do the installation.
  - FMDL89 database has been created. The database has been scrubbed and is ready to be verified by other team members. The first iteration of this database will be ready to send to MCG by the end of the month.
  - Integration broken communication issue resolved. HR and Financials apps now communicating successfully, without the work around.
- **Training**
  - UPK Development demo presented to Functional Sub Team
- **Communications**
  - Weekly Updates distributed on Monday, Mar. 5, 2007
  - Web pages updated
  - Preliminary agendas created for the March IR meeting and the April QUM/IR meeting

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- **Functional**

- Functional/Technical specifications walk-through completed:
  - 5 AP
  - 9 GL
  - 6 BP
- Upgrade ticket stats: through 3/07/07 – 151 tickets created; 84 in Closed or Resolved status. All institutions now represented.
- Functional/Technical specification writing has begun. The following numbers are being tracked : (numbers reported below do not include queries)

Overall	Total Specs	Not Started	In Progress	Ready-Walk	Pass to Dev	System Test	Complete	Dropped
AM Specs	21	1	3	2	15	0	0	0
AP Specs	26	3	6	1	14	0	0	1
AR Specs	0	0	0	0	0	0	0	0
BP Specs	35	6	0	3	26	0	0	0
EXP Specs	7	0	1	1	5	0	0	0
GL Specs	98	28	6	12	38	0	0	14
PO Specs	14	1	0	0	13	0	0	0
	201	39	16	19	111	0	0	15
		19%	8%	9%	55%	0%	0%	7%

- **Security**

- Third security class held; Security Training From Oracle 3/5-7/07, Completed draft for password controls, Single Sign on Doc has been drafted, Draft created for Document Security Design for Definition Security

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## Outstanding Issues, Possible Resolutions & Decisions Needed

- **Functional**
  - Recommendation to leave AR configuration and functionality as is in the upgrade has been approved by the Business Process Project Manager and has been forwarded to Project Sponsor for final decision.
  - Should row level security be implemented in 8.9 This item escalated to sponsor for endorsement as a project principle from implementation forward for entire USG.
- **Other**
  - Vacant FDM and PSFIN positions introduce risk to functional tasks for the project and for FDM tasks. PSFIN support position posting closes 12/29/06. FDM position is open until filled.
- **Development**
  - OIIT is working on solution to facilitate messaging of HRMS personal data to Financials required for Expenses and eProcurement functionality. This effort will require updates in HRMS. A meeting with HRMS is schedule on 1/9/07 to further define the requirements. HRMS upgrade schedule will significantly impact the ultimate solution for transferring personal data from HR to Financials, and it could impact the timeline for development and system testing.
- **Architecture**
  - Update for this week: A Final Load Testing strategy dialog continues. Details have been sent to the appropriate personnel
  - A solution for load testing is pending from the Architecture sub-team. More information will follow soon.
- **Security**
  - Security design and build is in a separate database from development. Resolution would be to move security into FDEV01 along with development. This would help with collaboration between security and development to include all new security objects in development.
  - Initial discussions for self registration for Expenses have been held. Strategy to determine master record for User ID has been discussed. Since master record of employee ID is HRMS, then the suggestion may be forcing all self registration through HRMS making Finance a synchronized environment with both Employee ID and User ID. These credentials are the basis for Employee self-service and Expense security. Single sign on initial discussion held. Decision needs to be made in regards to user id synchronization.
- **Training**
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## Upcoming Events

- **Upcoming team training:**
    - PeopleSoft Integration Tools - TBD
  - **Security**
    - Third Security Training Class scheduled for 3/8/2007.
    - Oracle Security Class held 3/5-7/2007.
  - **Architecture**
    - Integration Broker Configuration
    - WebLogic Managed Web server Configuration
  - **Training**
    - 3/27/07 – Training Road Show at OIIT
    - 3/28/07 – Training Road Show at Middle GA college
    - 4/11/07 – Training Road Show at Armstrong State
  - **Upgrade**
    - Additional Upgrade consultant (Maria) to start March 26, 2007.
    - Test Move 3 to start April 2, 2007.
  - **Functional**
    - Conf call with auditors, USO and OIIT representatives regarding prior year data cleanup strategy – 3/6/07 tentative
  - **Communications**
    - Institutional Readiness web conference: Mar. 21, 2007 at 10:00 a.m.
    - Quarterly Update Meeting: Apr. 16, 2007 9:00-4:30
    - Bi Monthly newsletter to be published: Mar. 23, 2007
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