



FS 8.40.065



Upgrades from CMS

http://cms.calstate.edu/T2_MReleases.asp Refer to URL for summary of changes in the upgrades.

>>>> CMS Estimate to apply the release to campus test environment: **3 Days**

Financials - 8.40.065 (PeopleTools version: 8.46.17)

The next Baseline Release package will be available on 11/6/2006. This release will include a project as well as updates to the file share installation package.

Summary of Current Upgrade Dates and Plans

2/28/07	SOSS applies release to F8SLOPRO
4/5/07	COMR submissions and CMS Central patches and fixes for FS frozen until after FSLOPRD upgraded and F8SLODVL rebuilt (exceptions handled on an individual basis).
4/5/07	Meeting with all tech support and functional lead staff: review plans, timing
4/9/07 – 4/11/07	ITS apply release to the test environment, F8SLOTST
4/11/07	Security applied to the test environment F8SLOTST
4/12 – 4/13/07	Technical review: programmers review compare rpts, audit rpts, DDLs. Change DDLs if needed for custom indexes
4/13/07 – 4/24/07	Test new release in the test environment F8SLOTST
Evening of 4/24/07	Meeting with all PRD update support staff: review plan, contact info
4/24/07, 3:00pm	CMS Central apply upgrade to FSLOPRD
4/24/07, 8:00 PM	Security applied to FSLOPRD
4/24/07, 9:00 PM	Test new release in FSLOPRD
4/25/07, 8:00 AM	Release FSLOPRD for all users
4/25/07	Clone F8SLOTRN, F8SLOSTG and F8SLOCNV from F8SLOPRD.
5/1/07	Clone the developer environment, F8SLODVL, and the test environment, F8SLOTST, from FSLOPRD

Process for upgrade planning

1. The FS application leads determine general timing and dates to apply the CMS Central releases.
2. Technical lead:
 - a. Requests date from CMS HD
 - b. Inform psdba group, WTS group of dates, plans.
 - c. Schedule in-person mtg with WTS staff (without functional staff) to review process for file share updates and support.
3. Librarian prepares an upgrade plan with names, dates, times. Send plan to the cms-psfin-upgrades@calpoly.edu distribution list informing all PS support staff (team leads, implementation staff, support staff). This plan includes tasks with names and dates. Email advises implementation staff to review plan, mark calendars and plan processes accordingly.
4. ITS staff & functional testers meet in-person to review PRD update plans and test window, communication method, expectations. ITS staff will schedule this meeting.
5. Technical lead schedules meeting with CMS tech services and QA group to review PRD update.
6. Technical lead ensures technical support understand changes that need to be made are tested and confirm the PRD weekend plans. Areas affected:
 - a. CMS tech lead, librarian, application file share support, portal support, data warehouse support, technical prod support programmer, security manager, stu pay tech support,
 - b. Functional lead, functional testers who will validate PRD after release is applied.
 - c. If release includes Tools update, we need to have BOTH versions of the file shares on WTS available at the same time during the update to non-prd
7. Two days before PRD is upgraded the librarian sends email confirming/reminding technical support staff and functional testers of the PRD tasks.

Distribution lists for upgrade plans and information during upgrades

For Financials, send email to cms-psfin-upgrades@calpoly.edu.

Instance dispositions:**FS 8.4**

FSLOPRD Production, upgraded by SOSS only
 F8SLOCNV System testing (cloned from PRD regularly)
 F8SLODVL SQR development.
 F8SLOTST nVision report development and patch and upgrade testing.
 F8SLOTRN End user training.
 F8SLOPRO Shared campus area containing test data only (not Cal Poly's test data). Contains latest CMS baseline only, installed by SOSS, with no patches, fixes or updates.
 F8SLOSTG Upgrade use only.

Documentation Sources

ITS CMS Support Web Pages: <http://www.calpoly.edu/~cms/>
 This document: <http://www.calpoly.edu/~cms/Upgrades/currentFin.pdf>
 Upgrade History Pages: <http://www.calpoly.edu/~cms/UpgradeHistories/>
 FS 7.x Upgrade History Pages: <http://www.calpoly.edu/~cms/UpgradeHistories/ - Financials 7.x>
 FS 7.x Current SOSS Upgrade and Patch documents by version (patches for a version show up immediately above that version and below the next version):
<http://www.calpoly.edu/~cms/UpgradeHistories/FinPatchSummary.html>

F8SLOPRO Prototype upgrade (Applied and maintained by SOSS)

No	Date Planned	Responsible	✓	Task
1	2/28/07	SOSS	✓	SOSS applies the new version to F8SLOPRO by the Monday or next working day following the release date as part of their regular release schedule.
2	N/A	PS DBA		Tools Release Only: The Portal COMR Java class files must be copied to the new classes directory for this tools release. (NOTE: This will not affect F8SLOPRO, but will allow further development environments to be added under the new tools release without class files needing to be updated.)
3	3/7/07	PS DBA	✓	Tools Release Only: Update the upgraded environments links on the Cal Poly portal by updating the RSS files in the cmsrss account on the portal machines using the "Managing RSS pages for the My CalPoly PeopleSoft channels" procedure on the AIM/IM Internal Procedure pages.
4	3/7/07	George W.	✓	Test that web access to the environment is functional.
5	3/7/07	George W.	✓	<i>Release environment to users</i> - Notify people of status by sending email to: mailto:cms-psfin-upgrades@calpoly.edu .

Financials Upgrade Preparation

Financials Upgrade Preparation				
No	Date Planned	Responsible	✓	Task
1	N/A	George W		<p>Tools Release Only (net needed anymore): Request JSL, WSL and Web Server Ports for instance to receive test upgrade (F8SLOTST). Provide numbers to DBAs, programmers, and AFD LAN support staff (Bill Leddy, Bob Schremp)</p> <p>CMS# 00000 _____</p>
2	4/5/07	George W	✓	Request a list of campus functional users from FS Team Lead, who will actually be performing the tests on the production test day with a contact phone number.
3	N/A	George W		<p>Tools Release Only (Not needed anymore): Provide JSL, WSL and Web Server Ports for instance to receive test upgrade (F8SLOTST) to DBAs and programmers: cms-psfin-fixes@calpoly.edu</p> <p>Ref CMS# 00000 _____</p>
4	4/5/07	George W.	✓	<p>Tools Release Only:</p> <ul style="list-style-type: none"> Request updated Cal Poly Portal Project Package with updated web pages and instructions for SOSS from Greg W. Need pages for all environments Request updated URLs for alternate logins for all environments to CP PS DBAs for update of campus portal channels.
5	4/5/07	George W.	✓	Request any Crystal Report Updates above those currently in use (send developers a zip file containing the current reports)
6	4/5/07	George W	✓	Request list of users (from Laurie Borello or Debbie Brothwell) who will testing on the actual production test day with a contact phone number for them.
7	4/5/07	George W.	✓	Provide a list of technical support people who will be available on the actual production test day with a contact phone number for them.

Financials Upgrade Preparation			
No	Date Planned	Responsible	✓ Task
8	N/A	George W.	<p>Tools Release Only (not needed anymore):</p> <p>Create CMS Remedy tickets to update the web servers, <i>on request by telephone</i>, and to update Integration Broker using these steps:</p> <ol style="list-style-type: none"> 1. Create web server for new tools release (while maintaining the previous release): <ol style="list-style-type: none"> a. Update Web Pages on Web Server as per Cal Poly Portal COMR instructions. b. Update Web Server configuration as per Cal Poly Portal COMR instructions. 2. Remove old tools release web server on request. 3. Update to the IntegrationGateway.properties file and refresh of the gateway for Finance Tools Release 8.46.17 for the development environments: <ol style="list-style-type: none"> A. The upgrade test environment (F8SLOTST) for the date that the environment upgrade starts (4/9/07). <p style="margin-left: 20px;">CMS# <u>00000</u></p> B. The instances (F8SLOCNV, F8SLOSTG, F8SLOCNV, F8SLODVL) can all be done at the same time based on what was learned from the test upgrade. They must be done no later than the work day after the production upgrade (4/25/07). <p style="margin-left: 20px;">CMS# <u>00000, 00000, 00000</u></p> <p>NOTE: FSLOPRD is handled via the upgrade ticket for that environment.</p>
9	4/5/07	George W	<p>Get the latest version of the DDL being used for FSLOPRD. It is available from the CSU010 machine location:</p> <p style="text-align: center;">/backup/oracle/adhoc_sql/fsloprd.sql</p> <p>Forward DDL to developers and PS DBAs for review with upcoming upgrade. Also include any scripts executed by this script.</p>
10	4/6/07	Greg W.	<p>Tools Release Only:</p> <ul style="list-style-type: none"> • Send updated Cal Poly Portal Project Package with updated web pages and instructions for SOSS from Greg W. • Need pages for all environments • Send updated URLs for alternate logins for all environments to CP PS DBAs for update of campus portal channels.
11	4/6/07	Kathy A.	<p>Send updated crystal report files to CP PS DBAs for inclusion in CMS Remedy Tickets and updating development NT Servers.</p>

Financials Upgrade Preparation				
No	Date Planned	Responsible	✓	Task
12	4/5/07	George W		Send instructions for testing nVision via WTS to Laurie Borello, Debbie Brothwell (copy to Fin Upgrades list). They cannot simply login to WTS to test new nVision – it will run the old nVision program with old PTools. Review and update if appropriate this doc before sending to users: http://www.calpoly.edu/~cms/Support/Docs/UpgTestingAuxFSApps.html
13	4/10/07	George W		Add entry to System Status of planned Finance upgrade. (Policy is notice is 2 weeks in advance of the production upgrade)
14	4/10/07	George W		Update Operations Outage Notice Template at S:\ITS\Projects\OUTAGE_NOTIFICATION TEMPLATES
15	4/25/07	Tom C./ Patricia A.		Remind developers that they must backup their projects (Copy to File) on 5/1/07 prior to the F8SLODVL clone on 5/2/07 and that after the clone on 5/2/07 they must re-import their projects and rebuild them.
16	4/5/07	George W.	✓	Distribute a list of available patches for the upgraded version to be applied with the upgrade. This is the list that will be used and additional patches will only be added if tested in the upgrade test environment (F8SLOTST), between it upgrade and the FSLOPRD upgrade. Review due back on 4/6/07.
17	4/5/07	George W	✓	Create a Cal Poly Remedy ticket for Tom Crabaugh/ Patricia Ashe to clone the following instances on 3/28/07 in the order shown: <ol style="list-style-type: none"> 1. FSLOPRD into F8SLOSTG <ol style="list-style-type: none"> a. Clone FSLOPRD to F8SLOSTG b. Reset passwords c. Reset UNIX applications server and NT process scheduler for F8SLOSTG d. Repair database links for F8SLOSTG NOTE: During a tools release, F8SLOTST should be cloned from FSLOPRD, then F8SLOSTG cloned from F8SLOTST after the tools portion of the upgrade has been applied. 2. F8SLOSTG to the test environment (F8SLOTST) <ol style="list-style-type: none"> a. Clone F8SLOSTG to F8SLOTST b. Reset passwords c. Reset UNIX applications server and NT process scheduler for F8SLOTST d. Repair database links for F8SLOTST 3. Request that the caches be cleared on WTS and user Desk Tops for F8SLOTST and F8SLOSTG. 4. Request PS DBA to update the Upgrade History Web Pages for the cloned environments. <p>CP# <u>222341</u></p>

Financials Upgrade Preparation

No	Date Planned	Responsible	✓	Task
18	4/5/07	George W	✓	<p>Create a Cal Poly Remedy ticket for Tom Crabaugh/ Patricia to clone the following instances on 4/25/07 in the order shown:</p> <ol style="list-style-type: none"> 1. Clone of FSLOPRD into F8SLOSTG at 6:30 AM <ol style="list-style-type: none"> a. clone of FSLOPRD into F8SLOSTG b. reset passwords c. rebuild database links for F8SLOSTG d. reset UNIX applications server and NT process scheduler to the new release. e. Copy the Cal Poly customized Crystal Reports to the F8SLOSTG Crystal Reports directory 2. After testing of the test environment has been approved, Clone of F8SLOSTG into F8SLOTRN <ol style="list-style-type: none"> a. clone of F8SLOSTG into F8SLOTRN b. reset passwords c. rebuild database links for F8SLOTRN d. reset UNIX applications server and NT process scheduler to the new release. e. Copy the Cal Poly customized Crystal Reports to the F8SLOTRN Crystal Reports directory 3. After testing of the test environment has been approved, Clone of F8SLOSTG into F8SLOCNV <ol style="list-style-type: none"> a. clone of F8SLOSTG into F8SLOTRN b. reset passwords c. rebuild database links for F8SLOCNV d. reset UNIX applications server and NT process scheduler to the new release. e. Copy the Cal Poly customized Crystal Reports to the F8SLOCNV Crystal Reports directory 4. Request that the caches be cleared on WTS and user Desk Tops for the cloned environments. 5. Request PS DBA to update the Upgrade History Web pages for the cloned environments. <p>CP# <u>222344</u></p>

Financials Upgrade Preparation				
No	Date Planned	Responsible	✓	Task
19	4/5/07	George W	✓	<p>Create a Cal Poly Remedy ticket for Patricia to perform the clone the following instances on 5/2/07 in the order shown:</p> <ol style="list-style-type: none"> 1. Clone FSLOPRD into F8SLODVL <ol style="list-style-type: none"> a. Clone FSLOPRD into F8SLODVL b. reset passwords c. rebuild database links for F8SLODVL d. reset UNIX applications server and NT process scheduler to the new release. e. Copy the Cal Poly customized Crystal Reports to the F8SLODVL Crystal Reports directory 2. Clone F8SLODVL into F8SLOTST <ol style="list-style-type: none"> a. Clone F8SLODVL into F8SLOTST b. reset passwords c. rebuild database links for F8SLOTST d. reset UNIX applications server and NT process scheduler to the new release. e. Copy the Cal Poly customized Crystal Reports to the F8SLOTST Crystal Reports directory 3. Request that the caches be cleared on WTS and user Desk Tops for the cloned environments. 4. Request PS DBA to update the Upgrade History Web pages for the cloned environments. <p>CP# <u>222345</u></p>

Financials Upgrade Preparation

No	Date Planned	Responsible	✓	Task
20	4/2/07	George W	✓	<p>Create a Cal Poly Remedy ticket for PS LAN Admins to create a test WTS system with new file share using the following steps:</p> <ol style="list-style-type: none"> 1. Create New WTS test machine for release 8.40.065 using previous release machine as a template including installation of all software involved. Machine requirements are 2 CPUs and 3.7 GB of memory. 2. Notify cms-psdba@calpoly.edu of new IP address so data center rules can be created for new machine (only performed in the evenings). NOTE: PS DBAs will need to put a ticket in to CMS with CTI of “CMS”,”HOSS”,”Security” and provide the new IP address the rules are to be created for an the old IP address to copy the rules from. 3. File share is to be available by 8:00 AM on 4/9/07. 4. Obtain latest release of the Finance file share for Finance 8.40.065 from the CMS Web site. 5. Update New TEST server (WTS) with the new file share. 6. On the file servers, clear the PeopleSoft cache for each user 7. Update the log where changes to the PeopleSoft application on the file servers is recorded 8. Apply file share changes for subsequent patches and baseline table updates. 9. Copy SLO files from previous file share to the new file shares. These include all SLO*. * SQRs/SQCs as well as CSU and PS customized SQRs/SQCs, SLO Crystal Reports and SLO nVision files. 10. Verify that all “Projects” directories are writable. These include but are not limited to: <ul style="list-style-type: none"> • P:\Projects\ • P:\<PSHOME>\Projects\ 11. Verify that at least 1-2 GB of free space exists on the C: drive for the SLO PS DBAs to install and created files as required during the upgrade process. 12. Notify George W. and George W when complete and what server to use by mailing cms-psdba@calpoly.edu <p>CP# <u>221526</u></p>

Financials Upgrade Preparation				
No	Date Planned	Responsible	✓	Task
21	4/5/07	George W	✓	<p>Create a Cal Poly Remedy ticket for PS LAN Admins to implement the production Finance file share using the following steps:</p> <ol style="list-style-type: none"> 1. Production must be prepared between 4/24/07 at 3:00 PM and 4/24/07 at 8:00 PM. 2. Update PROD file servers (WTS). NOTE: IP address is not to be changed without coordination of CMS firewall rules. 3. On the file servers, clear the PeopleSoft cache for each user 4. Apply file share changes for subsequent patches and baseline table updates. 5. Copy campus SQRs/SQCs, crystal reports and other local files from previous version of file share. NOTE: Can be accomplished by copying fileshare from test machine to production machine. 6. Update the log where changes to the PeopleSoft application on the file servers is recorded 7. Clear PeopleSoft cache on all WTS and AFD PeopleSoft servers 8. email cms-pshr-upgrades@calpoly.edu and call primary ITS PS DBA. <p>CP# <u>222347</u></p>
22	4/5/07	George W	✓	COMR submissions for Finance frozen until after FSLOPRD upgraded and F8SLODVL rebuilt (exceptions handled on an individual basis).
23	4/6/07	Greg Weir Kathy Anderson		Review of available patches for the upgraded version are due back to PeopleSoft librarian. Each patch must have a yes or no to be included in the upgrade.
24	4/6/07	George W.		Build final list of patches to be applied during upgrade process.
25	4/6/07	George W		Create SQR/File Share bundle from patches based on those available for the upgraded version. Send bundle to PS LAN Admins for installation in Test File Shares on 4/11/07 and production on 4/24/07.
26	N/A	George W		Have ownership of CMS Remedy Ticket for Upgrade changed to PriGeorge WS DBA. CMS# <u>91149</u>
27	4/11/07	George W		<p>Modify the CMS Remedy ticket for SOSS (10 work days in advance) to perform the following steps.</p> <p><i>Evaluate each of the below steps when adding them in the CMS Remedy ticket. Include steps they should perform for the PRD update and exclude steps that are not required for this specific PRD update (extra, unnecessary steps are confusing for CMS DBAs and QA staff).</i></p> <p><i>(Continued on next page)</i></p>

Financials Upgrade Preparation

No	Date Planned	Responsible	✓	Task
				<p><i>(Continued from previous page)</i></p> <p><i>Ticket description text follows this line:</i></p> <ol style="list-style-type: none"> 1. Disable access to FSLOPRD on Friday 4/24/07, 3:00pm. 2. Upgrade FSLOPRD on 4/24/07 after 3:00pm with new release – pending our OK within the ticket by 4/24/07, 12:00 PM Noon 3. Apply selected patches to be applied in the order they are to be applied. Include in this list patches that SOSS indicates they would automatically apply so they are not overlooked. (To be provided about one week before the upgrade.) 4. Apply all web page COMRs to web server. <i>(Tools release only)</i> 5. Implement the SLO Custom Objects Package. This package contains the necessary project, scripts and data files to restore SLO custom objects damaged by the upgrade process. (Project file to be attached to ticket about one week before the upgrade.) 6. Apply the Single Click Portal COMR (this must be applied with every upgrade in PRD). The COMR is attached to this ticket <i>on a tools release only unless otherwise required</i>. Please review the COMR migration instructions, if included, for steps that Unisys needs to perform. <ol style="list-style-type: none"> a. Reapply Single Click PeopleCode project. <i>(Remove if not required)</i> b. Rerun DMS script to update pointer to PeopleCode. <i>(Remove if not required)</i> c. Copy java class files from project zip file to new classes directory. If no new java class files, copy from previous release classes directory. <i>Required for all releases!</i> Java class files are: PSCASClient.class jcert.jar jnet.jar jsse.jar d. Point the CMS Web Server to the new release <i>(tools release only)</i>. e. Update web pages on web server as per the Cal Poly Portal COMR instructions <i>(tools release only)</i>. f. Update the Web Server configuration as per the Cal Poly Portal COMR instructions <i>(tools release only)</i>. 7. Update the IntegrationGateway.properties file, https://cmsreports.calpoly.edu/servlets/gateway.administration to reflect the new tools release and refresh the gateway for FSLOPRD Tools Release 8.46.17. 8. Test the Single Sign On process as follows: <ol style="list-style-type: none"> a. Using Internet Explorer, go to http://my.calpoly.edu/ b. Login into the Cal Poly portal using the “Cal Poly User Name” given to SOSS (“sosstech”) and the password set by SOSS (we don’t have it, if lost contact Cal Poly Service Desk, as per instruction on portal page). <p><i>(Continued on next page)</i></p>

Financials Upgrade Preparation			
No	Date Planned	Responsible	✓ Task
			<p><i>(Continued from previous page)</i></p> <ul style="list-style-type: none"> c. Under the “Single Click Access to . . .” channel, click on the “Go” button to the right of the “PeopleSoft Financials” label. d. A new window should open with the PeopleSoft Financials main page for FSLOPRD. If not, there is a problem with Single Sign On; perform the following steps: <ul style="list-style-type: none"> i. Verify that all steps in the SLO Single Sign On project we completed correctly. If not, correct and re-test. ii. Contact the Cal Poly DBAs listed as Contacts in this ticket. <p>9. Run the DDL scripts to regenerate the SLO Custom Indexes that might get dropped by the upgrade and/or any of the applied patches. Remove if weekend upgrade.</p> <p>10. If the update is applied mid-week (not on a Friday/weekend): Run the following SQL scripts to recreate the roles and access rights in FSLOPRD.</p> <p style="padding-left: 40px;">create_csu_select_role.sql create_csu_update_role.sql</p> <p>Remove if weekend upgrade.</p> <p>11. Notify Cal Poly users by telephone by calling PriGeorge WS DBA at the number listed in the contact information in this ticket. Remove if weekend upgrade.</p> <p>12. CMS DBA to notify Cal Poly users at end of upgrade by sending email to</p> <p style="padding-left: 40px;">cms-psfin-upgrades@calpoly.edu</p> <p>13. CMS QA techs to notify Cal Poly users at beginning of the CMS QA by sending email to</p> <p style="padding-left: 40px;">cms-psfin-upgrades@calpoly.edu</p> <p>14. CMS QA techs to notify Cal Poly users at the end of the CMS QA by sending email to</p> <p style="padding-left: 40px;">cms-psfin-upgrades@calpoly.edu</p> <p>15. Cal Poly DBA contact information:</p> <p style="padding-left: 40px;"><i>Insert Cal Poly DBA contact information at this point in the ticket.</i></p> <p>End of ticket description text.</p> <p>NOTE 1: This must be done as soon as possible in advance to lock the desired weekend in for SLO. Only five campuses can be upgraded per weekend and there are 26 campuses. Its first come first served with SOSS setting the schedules.</p> <p>NOTE 2: This must also be submitted no less than five working days before the desired weekend.</p> <p>NOTE 3: The upgrade worksheet must be attached to this ticket as soon as the test environment upgrade is completed.</p> <p>NOTE 4: Attach Single Click Portal COMR to the ticket.</p> <p>NOTE 5a: Attach SLO Custom Objects project package to ticket as soon as it is finalized.</p> <p>NOTE 5b. If we have any, attach SLO Custom Crystal</p>

Financials Upgrade Preparation				
No	Date Planned	Responsible	✓	Task
				<p>Reports to ticket as soon as they are finalized. NOTE 6: Append a SLO DBA contact list with phone numbers and email addresses to the end of the ticket description.</p> <p>CMS# <u>91149</u></p>
28	4/6/07	George W.		<p>Send message to those with prep tasks for the test upgrade to remind them of their tasks.</p> <p>Tools Release Only: Be sure to remind LAN Admin to have both releases available simultaneously (new file share must be available while running with old file share)</p>
29	3/28/07	Tom C./ Patricia A.		<p>Perform the following clones in the order shown using the steps indicated:</p> <ol style="list-style-type: none"> 1. Clone FSLOPRD to F8SLOSTG <ol style="list-style-type: none"> a. Clone FSLOPRD to F8SLOSTG b. Reset passwords c. Restart application server d. Repair database links for F8SLOSTG NOTE: During a tools release, F8SLOTST should be cloned from FSLOPRD, then F8SLOSTG cloned from F8SLOTST after the tools portion of the upgrade has been applied. 2. Clone F8SLOSTG to F8SLOTST <ol style="list-style-type: none"> a. Clone F8SLOSTG to F8SLOTST b. Reset passwords c. Restart application server d. Repair database links for F8SLOTST 3. Request that the caches be cleared on WTS and user Desk Tops for the cloned environments. 4. Request PS DBA to update the Upgrade History Web pages for the cloned environments. <p>Ref CP# <u>222341</u></p>
30	3/28/07	George W.		<p>Update the upgrade history file on the ITS/AIM-IM CMS Web Pages.</p>
31	3/28/076	Tom C./ Patricia A.		<p>Run dddaudit and sysaudit reports on F8SLOTRN, F8SLODVL, and F8SLOTST and work with George to fix problems, rerun as necessary after problems fixed.</p>
32	4/6/07	Don Duke/ Steve Evans		<p>Obtain refresh package via Web for FS Release 8.40.065. Store on the server where PeopleSoft librarians and DBAs can access it.</p>

Financials Upgrade Preparation				
No	Date Planned	Responsible	✓	Task
33	Before 8:00 AM on 4/9/07	Don Duke/ Steve Evans		<p>1. Create New WTS test machine for release 8.40.065 using previous release machine as a template including installation of all software involved. Machine requirements are 2 CPUs and 3.7 GB of memory.</p> <p>2. Notify cms-psdba@calpoly.edu of new IP address so data center rules can be created for new machine (only performed in the evenings).</p> <p>NOTE: PS DBAs will need to put a ticket in to CMS with CTI of “CMS”,”HOSS”,”Security” and provide the new IP address the rules are to be created for an the old IP address to copy the rules from.</p> <p>3. File share is to be available by 8:00 AM on 4/9/07.</p> <p>4. Obtain latest release of the Finance file share for Finance 8.40.065 from the CMS Web site.</p> <p>5. Update New TEST server (WTS) with the new file share.</p> <p>6. On the file servers, clear the PeopleSoft cache for each user</p> <p>7. Update the log where changes to the PeopleSoft application on the file servers is recorded</p> <p>8. Apply file share changes for subsequent patches and baseline table updates.</p> <p>9. Copy SLO files from previous file share to the new file shares. These include all SLO*. * SQRs/SQCs as well as CSU and PS customized SQRs/SQCs, SLO Crystal Reports and SLO nVision files.</p> <p>10. Verify that all “Projects” directories are writable. These include but are not limited to:</p> <ul style="list-style-type: none"> • P:\Projects\ • P:\<PSHOME>\Projects\ <p>11. Verify that at least 1-2 GB of free space exists on the C: drive for the SLO PS DBAs to install and created files as required during the upgrade process.</p> <p>12. Notify George W. and George W when complete and what server to use by mailing cms-psdba@calpoly.edu</p> <p>Tools Release Only:</p> <p>NOTE: During a tools release both the current and the new file shares must be available at the same time. This is to allow for the steps required using the old tools file share to prep for the new tools using scripts from the new tools file share.</p> <p>Ref CP# <u>221526</u></p>

Financials Upgrade Preparation			
No	Date Planned	Responsible	✓ Task
34	4/9/07	Amy S.	<p>Schedule teleconference (request dial-up info from cmsadmin@calstate.edu) for the Friday or Monday before the PRD release is applied.</p> <p>Purpose:</p> <p>Since our SSO COMR is unique, talking about it the week they're going to work on it will help smooth the implementation.</p> <ul style="list-style-type: none"> • Review the ticket instructions to apply the release into PRD, • Review campus testing times, so CMS Central can be ready to provide faster response to problems • Review the expectations of campus notification <p><i>Invite and send dial-in information to:</i></p> <ul style="list-style-type: none"> • CMS Central technical and QA staff • Cal Poly librarian and DBA staff
35	4/9/07	Amy S.	<p>Confirm the campus is ready for PRD update:</p> <ol style="list-style-type: none"> 1. Appl tech release analysis complete – effect on work processes & in-house programs complete. Compare report reviewed and analyzed or resolved. Tables reviewed for DWH changes 2. Appl func testing complete: sqr, crystal, ps query, report manager, nVision, DWH tables, navigation 3. Appl security test complete & ready for PRD testing 4. Trusted authentication testing complete 5. PS file shares and WTS access ready for PRD changes and support 6. Data warehouse group ready for PRD validation

F8SLOTST Upgrade

F8SLOTST Upgrade				
No	Date Planned	Responsible	✓	Task
1	N/A	George W.		<p>Tools Release Only:</p> <p>Verify that both tools releases are available simultaneously for the upgrade.</p>
2	4/9/07	George W.		<p>Verify that all "Projects" directories are writable. These include but are not limited to:</p> <ul style="list-style-type: none"> • P:\Projects\ • P:\<PSHOME>\Projects\ <p>Contact PS LAN Admins with any changes.</p>
3	4/9/07	George W		<p>Copy application update projects, scripts, data and any other associated directories and files to a subdirectory under C:\TEMP\ on the WTS server to be used for testing.</p>
4	4/9/07	George W		<p>Apply FS release as follows:</p> <p><i>All users must exit database and stay out until database released for access again.</i></p> <ol style="list-style-type: none"> 1. Lock Environment (no more development) 2. Copy project from file to F8SLOTST as per upgrade instructions. 3. Verify all objects were copied successfully. Steps are: <ol style="list-style-type: none"> a. Open up the upgrade project in F8SLOTST and note the number of objects in each object b. Open up the upgrade project in F8SLOPRO and note the number of objects in each object c. Compare the numbers of objects between the two environments. They should be the same (e.g., the number of field objects is the same in F8SLOTST and F8SLOPRO). 4. Tools Release Only: Perform upgrade steps as indicated in Baseline Release Notes up to tools installation completed.
5	4/9/07	Tom C./ Patricia A.		<p>Tools Release Only:</p> <p>Clone test environment (F8SLOTST) to F8SLOSTG to allow for compare reports for the application portion of the upgrade. Compare reports can only be done between two instances at the same tools release.</p> <p>NOTE: This can only be done when the tools and applications upgrades are <i>separate</i> projects.</p>
6	4/9/07	George W		<p>Perform DBA steps as outlines in the upgrade instructions.</p> <p>NOTE: Portions, if not all, of the next major step may need to be done when the instructions indicate that the web server is to be upgraded at that time.</p>

F8SLOTST Upgrade			
No	Date Planned	Responsible	✓ Task
7	4/10/07	George W.	<p>Apply Portal COMR to upgrade test environment and UNIX Applications Server for test environment. This includes:</p> <ol style="list-style-type: none"> 1. Applying Portal PeopleCode Project via F8SLOSTG (only needed if code may have been compromised). NOTE: Past experience shoes that this only needs to be run if the web server doesn't work without it. 2. Rerun DMS script to set link to point to Portal PeopleCode (<i>Run with each release since this link is not an SLO object.</i>) NOTE: Past experience shoes that this only needs to be run if the web server doesn't work without it. 3. Tools Upgrade Only: Verify Portal Java class files copied properly when F8SLOPRO upgraded. NOTE: This should have been done for all development environments when F8SLOPRO was set up for this release. 4. Tools Upgrade Only: Check that SOSS has created the new web server for this instance and tools release. <p>Ref CMS# <u>00000</u></p>
8	4/10/07	George W	Point UNIX application server and process scheduler and the NT process scheduler to the new release.
9	4/10/07		Tools Upgrade Only: Update the IntegrationGateway.properties file, https://cmsreports.calpoly.edu/servlets/gateway.administration to reflect the new tools release and refresh the gateway for FSLOCNV Tools Release 8.46.17.
10	4/10/07	George W	Copy SLO SQRs/SQCs from FSLOPRD production application server campus SQR directory to test environment application server campus SQR directory.
11	4/11/07	George W.	Test Single Sign On access (if a tools release, you must wait for SOSS to finish their part of the previous step).
12	4/11/07	George W.	Tools Release Only: Update the upgraded environments links on the Cal Poly portal by updating the RSS files in the cmsrss account on the portal machines using the "Managing RSS pages for the My CalPoly PeopleSoft channels" procedure on the AIM/IM Internal Procedure pages.

F8SLOTST Upgrade				
No	Date Planned	Responsible	✓	Task
13	4/11/07	George W.		<p>Run remaining DBA steps after portal is upgraded including the compare reports and analyze the results:</p> <ol style="list-style-type: none"> 1. Run compare reports between F8SLOTST (source) and the F8SLOSTG (target) database. 2. Create a Compare report directory for the application upgrade on WTS (under the application upgrade directory on C:\TEMP\ created for the upgrade) 3. Notify programmers (if appropriate) that reports are ready for review. <p>NOTE: SOSS DBAs <i>do not</i> perform this step. The use the project with the upgrade flags set as is. Performing the compare reports may change result in changes to the upgrade flags and as such we may consider performing the process, saving the reports, and reloading the project back into F8SLOSTG to reset the upgrade flags.</p>
14	4/11/07	Laurie		<p>Implement security When complete notify people of status by sending email to cms-psfin-upgrades@calpoly.edu.</p>
15	4/11/07	George W		<p>Apply all approved patches available for the release being implemented to upgrade test environment as per their instructions.</p>
16	4/11/07	George W.		<p>For each patch applied that contained PeopleSoft objects (projects) perform the following steps: Run the compare reports and analyze the results:</p> <ol style="list-style-type: none"> 1. Tools Upgrade Only: Re-clone F8SLOSTG from F8SLOTST after tools have been applied, but prior to any of the application upgrade. Compare reports can only be run between like tools releases. 2. Run compare reports between F8SLOTST (source) and the F8SLOSTG (target) database. 3. Create a Compare report directory for the individual patch on WTS (under the application upgrade directory on C:\TEMP\ created for the upgrade) 4. Notify programmers (if appropriate) that reports are ready for review.
17	4/11/07	George W.		<p>Send a message to the developers to review the compare reports and create a project to correct any changes to SLO custom objects as well as DMS and SQL scripts to correct any non-PeopleSoft objects. cms-pshr-dev@calpoly.edu</p>

F8SLOTST Upgrade			
No	Date Planned	Responsible	✓ Task
18	4/12/07	Kathy A.	<p>Developer creates a SLO Custom Objects Project Package that contains the one or more of the following (project can be created in F8SLOSTG which is a clone of Production or F8SLOTST immediately prior to the application upgrade being installed):</p> <ul style="list-style-type: none"> • ApplicationDesigner Project containing definitions of all objects changed by the upgrade and patches. • Any DMS scripts and data files to restore any data that may have been destroyed during the upgrade and patch processes. • Any SQRs/SQCs that were modified by the release. <p>And send it to the Cal Poly PS DBAs as a COMR to be applied to the Test Environment.</p>
19	4/13/07	Kathy A./ Tom C./ Patricia A.	<p>Developer and PS oracle DBA create a modified DDL based on that found at the location:</p> <p style="text-align: center;">/backup/oracle/adhoc_sql/fsloprd.sql</p> <p>and forward it to the Cal Poly PS DBAs as a COMR to be applied to the Test Environment or indicate that there are no changes and that the stock SOSS DDL should be used.</p>
20	4/13/07	George W.	<p>Copy</p> <ol style="list-style-type: none"> 1. SLO SQRs/SQCs from FSLOPRD production application server campus SQR directory to test environment application server campus SQR directory. 2. SQR bundle generated from the approved patches available to the UNIX application server for the test environment 3. Cal Poly customized Crystal Reports to the F8SLOTST Crystal Reports directory <p>Using the RepliWeb utility.</p>
21	4/13/07	George W./ Tom Crabaugh/ Patricia Ashe	<p>Run the sql scripts:</p> <p style="text-align: center;">create_csu_select_role.sql create_csu_update_role.sql</p> <p>located in the "S:\ITS\AIM\IM\DBA\CMS\SQL Scripts" folder.</p> <p>NOTE: These scripts can be run in parallel to save time.</p>
22	4/13/07	George W	<p>Implement the SLO Custom Objects Project Package created by the developers above.</p> <p>NOTE: This process may have one or more iterations, after the initial pass, to accommodate all of the changes over-written by the upgrade and subsequent patches. Inform the developers when the implementation is complete so they can test.</p>
23	4/13/07	George W.	<p>Implement the SLO modified DDL as sent by the developer or the one SOSS uses if indicated by the developer.</p> <p>NOTE: This process may have one or more iterations, after the initial pass, to accommodate all of the changes over-written by the upgrade and subsequent patches. Inform the developers when the COMR application is complete so they can test.</p>

F8SLOTST Upgrade			
No	Date Planned	Responsible	✓ Task
24	4/13/07	George W./ Tom Crabaugh/ Patricia Ashe	Run the sql scripts: create_csu_select_role.sql create_csu_update_role.sql located in the "S:\ITS\AIM\IM\DBA\CMS\SQL Scripts" folder. NOTE: These scripts can be run in parallel to save time.
25	4/13/07	George W.	Run SYSAUDIT, DDDAUDIT reports, rerun as necessary after problems fixed.
26	4/13/07	George W	When complete notify people of status by sending email to: cms-psfin-upgrades@calpoly.edu .
27	4/13/07	Greg W	Check Integration Broker configuration and correct as necessary.
28	4/13/07	Laurie B. Suzanne LaCaro Carol Johnston	Test environment major functionality based on changes made to database. Remember to use the TEST file servers (AFD or WTS servers) When complete notify people of status by sending email to cms-psfin-upgrades@calpoly.edu .
29	4/13/07	George W	Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.
30	4/13/07	George W	Attach the Upgrade Worksheet, modified throughout this test install, to the ticket to upgrade the production environment FSLOPRD. Ref CMS# <u>91149</u>
31	4/13/07	George W.	Add the final list of approved patches to the ticket to upgrade the production environment FSLOPRD. Ref CMS# <u>91149</u>
32	4/13/07	George W	Attach the final SLO Custom Objects Project Package created by the developers, based on the compare reports and other factors, as well as any new DDL, to the ticket to upgrade the production environment FSLOPRD. Ref CMS# <u>91149</u>
33	4/13/07	George W	Attach the final SLO Modified DDL Project Package created by the developers to the ticket to upgrade the production environment FSLOPRD. Ref CMS# <u>91149</u>
34	4/13/07	George W	Attached customized Crystal Reports Package created by the developers to the ticket to upgrade the production environment FSLOPRD. Ref CMS# <u>91149</u>
35	N/A	George W	Tools Release Only (not needed anymore): Request that SOSS remove old version of web server for the test instance (F8SLOTST). Ref CMS# <u>00000</u>

FSLOPRD Upgrade

FSLOPRD Upgrade			
No	Date Planned	Responsible	✓ Task
1	4/17/07	George W.	<p>Make sure that all items have been attached to the production ticket including:</p> <ol style="list-style-type: none"> 1. SLO Single Sign On Project (<i>Tools Release Only</i>). 2. SLO Custom Crystal Reports. 3. SLO Custom Objects package. 4. SLO modified DDL for FSLOPRD. 5. SLO DBA contact phone numbers and email addresses in preferred order. <p>Ref CMS# <u>91149</u></p>
2	4/19/07	George W	<p>Send email to cms-psfin-upgrades@calpoly.edu confirming and listing weekend tasks with names, the URL of the full schedule, and contact information for testers and DBAs to contact if there are problems.</p> <ol style="list-style-type: none"> 1. Home Phone 2. Cell Phone 3. Work email 4. Alternate email <p><i>Sample message: <update before sending out>:</i></p> <p>The following schedule of events and contact list is vital information for everyone involved in the Fin 8.40.065 upgrade, scheduled to begin on day, date, time.</p> <p>Full schedule of events – please refer to the official “Finance PeopleSoft Environment Upgrade Plan” at the following URL: http://www.calpoly.edu/~cms/Upgrades/currentFin.pdf for step by step procedures.</p> <p>Summary of tasks:</p> <p>4/24/07 3:00 PM SOSS performs FSLOPRD upgrade and initial testing.</p> <p>4/24/07 3:00 PM Doug Scheel updates PRD file servers (WTS) and other PS files tasks then emails cms-psfin-upgrades@calpoly.edu</p> <p>4/24/07 NOTE: If we hear from SOSS that all steps are complete, some of the events may be started earlier.</p> <p>8:00 PM SOSS completes the upgrade and QA steps and emails cms-psfin-upgrades@calpoly.edu alias.</p> <p>8:00 PM Laurie implements security, validates system, and sends email to cms-psfin-upgrades@calpoly.edu</p> <p><i>(Continued on Next Page)</i></p>

FSLOPRD Upgrade				
No	Date Planned	Responsible	✓	Task
				<p><i>(Continued from Previous Page)</i></p> <p>9:00 PM Greg Weir checks the Integration Broker configuration - send email to cms-psfin-upgrades@calpoly.edu</p> <p>9:00 PM Laurie performs functional validation and sends email to cms-psfin-upgrades@calpoly.edu</p> <p>9:00 PM Tamra Moen checks access on tables and views to ensure nightly jobs will run and sends email to cms-psfin-upgrades@calpoly.edu</p> <p>4/25/07</p> <p>8:00 AM George release environment to users – send email to cms-psfin-upgrades@calpoly.edu, update http://systemstatus.calpoly.edu/</p> <p>Contact staff phone numbers, email and alternate email. *****</p> <p>DBA Contact Information: <list DBAs contact info> Tester Contact Information: <list testers contact info></p> <p><i>End of Sample message:</i></p>
3	4/24/07	Tom C./ Patricia A.		Run dddaudit and sysaudit reports and notify by email to George W.
4	4/24/07 3:00 PM	Don Duke/ Steve Evans		<p>Perform each of the following:</p> <ol style="list-style-type: none"> 1. Production must be prepared between 4/24/07 at 3:00 PM and 4/24/07 at 8:00 PM. 2. Update PROD file servers (WTS). NOTE: IP address is not to be changed without coordination of CMS firewall rules. 3. On the file servers, clear the PeopleSoft cache for each user 4. Apply file share changes for subsequent patches and baseline table updates. 5. Copy campus SQRs/SQCs, crystal reports and other local files from previous version of file share. NOTE: Can be accomplished by copying fileshare from test machine to production machine. 6. Update the log where changes to the PeopleSoft application on the file servers is recorded 7. Clear PeopleSoft cache on all WTS and AFD PeopleSoft servers 8. email cms-pshr-upgrades@calpoly.edu and call primary ITS PS DBA. <p>Ref CP# <u>222347</u></p>

FSLOPRD Upgrade			
No	Date Planned	Responsible	✓ Task
5	4/24/07 7:00 PM to 7:59 PM	SOSS	SOSS Finishes majority of PRD upgrade. Request was made as part of Finance Upgrade Preparation steps. Ref CMS# <u>91149</u>
6	4/24/07	SOSS	Point the NT process scheduler and UNIX Application Server and process scheduler for the instance to the new release.
7	4/24/07	SOSS	Implement all post baseline CMS patches requested by functional users.
8	4/24/07	SOSS	Copy SLO custom Crystal Reports to NT Server.
9	4/24/07	SOSS	Apply Cal Poly Portal COMR to production which includes: 1. Apply project to FSLOPRD 2. Run DMS script to update pointer to PeopleCode 3. Copy JAVA class files to new classes directory. 4. Update web pages for the release. (<i>Tools release only</i>) 5. Update Web Server configuration. (<i>Tools release only</i>) 6. Test Single Sign On.
10	4/24/07	SOSS	Implement the SLO Custom Objects Package as described in the included instructions.
11	4/24/07	SOSS	Run custom DDL to restore any non-baseline indexes that may have been deleted by the upgrade and/or applied patches.
12	N/A	SOSS	Update the CMS Web page links (tools release only).
13	4/24/07	SOSS	Run the sql scripts: create_csu_select_role.sql create_csu_update_role.sql
14	4/24/07	SOSS	SOSS Finishes PRD upgrade.
15	4/24/07 8:00 PM	Laurie	Implement security if database is stamped for new release. When complete notify people of status by sending email to cms-psfin-upgrades@calpoly.edu . If login problems are encountered, work with primary IT DBA. DBA: Couple of items to check: port number, https is used.
16	4/24/07 9:00 PM	Greg W.	Check Integration Broker configuration and correct as necessary.
17	4/24/07 9:00 PM	Laurie B. DWH staff	Functional and technical upgrade validation. When complete notify people of status by sending email to cms-psfin-upgrades@calpoly.edu . Testers must also contact the primary Cal Poly PS DBA to let them know that they are done, have encountered show stoppers, or need more time at the phone number provided in the email sent out by the PS DBAs regarding production upgrade activities. DWH staff: check access on tables and views in PRD to ensure nightly jobs will run.
18	4/25/07 8:00 AM	George W.	1. Release environment to users - Notify people of status by sending email to cms-psfin-upgrades@calpoly.edu . 2. Update System Status
19	4/25/07	George W.	Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.

F8SLOSTG upgrade (cloned from FSLOPRD)

F8SLOSTG Clone				
No	Date Planned	Responsible	✓	Task
1	4/25/07 6:30 AM	Patricia A		1. Clone FSLOPRD to F8SLOSTG 2. Reset Passwords 3. Restart the UNIX Applications Server pointed to the new release 4. Restart the NT Process scheduler pointed to the new release. 5. Copy the Cal Poly customized Crystal Reports to the F8SLOSTG Crystal Reports directory (F8SLOSTG/crw/eng). NOTE: Existing files must be renamed before and files with the same name can be copied in place. 6. Repair database links for F8SLOSTG 7. Request that Cache's be cleared. Ref CP# <u>222344</u>
2	4/25/07	George W		Check that clone was successful
3	N/A	George W.		Tools Release Only (not needed anymore): Check that SOSS has created the new web server for this instance and tools release. Reference ticket created in prep steps: Ref CMS# <u>00000, 00000, 00000</u>
4	4/25/07	George W.		Tools Release Only: Update the upgraded environments links on the Cal Poly portal by updating the RSS files in the cmsrss account on the portal machines using the "Managing RSS pages for the My CalPoly PeopleSoft channels" procedure on the AIM/IM Internal Procedure pages.
5	4/25/07	George W		Campus files: 1. Copy SQRs/SQCs from FSLOPRD 2. Copy any COMRs in already copied to DEV but not yet in FSLOPRD to the new structure. 3. Copy SQR bundle generated from the approved patches available 4. Copy any SQRs/SQCs from the SLO Custom Objects Package to the UNIX application server for this environment using RepliWeb utility.
6	4/25/07	George W.		Test Single Sign On access (if a tools release, you must wait for SOSS to finish their part of the previous step).
7	4/25/07	George W		Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.

F8SLOTRN upgrade (cloned from F8SLOSTG)

F8SLOTRN Clone				
No	Date Planned	Responsible	✓	Task
1	4/25/07 9:00 AM	Patricia A		<ol style="list-style-type: none"> 1. Clone F8SLOSTG to F8SLOTRN 2. Reset Passwords 3. Restart the UNIX Applications Server pointed to the new release. 4. Restart the NT Process Scheduler pointed to the new release. 5. Copy the Cal Poly customized Crystal Reports to the F8SLOTRN Crystal Reports directory (F8SLOTRN/crw/eng). NOTE: Existing files must be renamed before and files with the same name can be copied in place. 6. Repair database links for F8SLOTRN 7. Request that Cache's be cleared. <p>Ref CP# <u>222344</u></p>
2	4/25/07	George W		Check that clone was successful.
3	N/A	George W.		<p>Tools Release Only:</p> <p>Check that SOSS has created the new web server for this instance and tools release. Reference ticket created in prep steps:</p> <p>Ref CMS# <u>00000, 00000, 00000</u></p>
4	4/25/07	George W.		<p>Tools Release Only:</p> <p>Update the upgraded environments links on the Cal Poly portal by updating the RSS files in the cmsrss account on the portal machines using the "Managing RSS pages for the My CalPoly PeopleSoft channels" procedure on the AIM/IM Internal Procedure pages.</p>
5	4/25/07	George W		<p>Campus files:</p> <ol style="list-style-type: none"> 1. Copy SQRs/SQCs from FSLOPRD 2. Copy any COMRs in already copied to DEV but not yet in FSLOPRD to the new structure. 3. Copy SQR bundle generated from the approved patches available 4. Copy any SQRs/SQCs from the SLO Custom Objects Package <p>to the UNIX application server for the test environment using RepliWeb utility.</p>
6	4/25/07	George W.		Test Single Sign On access (if a tools release, you must wait for SOSS to finish their part of the previous step).
7	4/25/07 11:00 AM	Patricia A		<p>Release environment to users -</p> <p>Notify people of status by sending email to cms-psfin-upgrades@calpoly.edu.</p>
8	4/25/07 11:00 AM	Greg W.		If this instance is to have Integration Broker enabled, check configuration and correct configuration as necessary.
9	4/25/07	George W.		Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.

F8SLOCNV upgrade (cloned from F8SLOSTG)

F8SLOCNV Clone				
No	Date Planned	Responsible	✓	Task
1	4/25/07	Patricia A		<ol style="list-style-type: none"> 1. Clone F8SLOSTG to F8SLOCNV 2. Reset Passwords 3. Restart the UNIX Applications Server pointed to the new release. 4. Restart the NT Process Scheduler pointed to the new release. 5. Copy the Cal Poly customized Crystal Reports to the F8SLOCNV Crystal Reports directory (F8SLOCNV/crw/eng). NOTE: Existing files must be renamed before and files with the same name can be copied in place. 6. Repair database links for F8SLOCNV 7. Request that Cache's be cleared. <p>Ref CP# <u>222344</u></p>
2	4/25/07	George W		Check that clone was successful.
3	N/A	George W		<p>Tools Release Only (not needed anymore):</p> <p>Check that SOSS has created the new web server for this instance and tools release. Reference ticket created in prep steps:</p> <p>Ref CMS# <u>00000, 00000, 00000</u></p>
4				<p>Update the IntegrationGateway.properties file, https://cmsreports.calpoly.edu/servlets/gateway.administratio n to reflect the new tools release and refresh the gateway for FSLOTST Tools Release 8.46.17.</p>
5	4/25/07	George W		<p>Tools Release Only:</p> <p>Update the upgraded environments links on the Cal Poly portal by updating the RSS files in the cmsrss account on the portal machines using the "Managing RSS pages for the My CalPoly PeopleSoft channels" procedure on the AIM/IM Internal Procedure pages.</p>
6	4/25/07	George W		<p>Campus files:</p> <ol style="list-style-type: none"> 1. Copy SQRs/SQCs from FSLOPRD 2. Copy any COMRs in already copied to DEV but not yet in FSLOPRD to the new structure. 3. Copy SQR bundle generated from the approved patches available 4. Copy any SQRs/SQCs from the SLO Custom Objects Package <p>to the UNIX application server for the test environment using <i>cmsupd</i> utility.</p>
7	4/25/07	George W.		Test Single Sign On access (if a tools release, you must wait for SOSS to finish their part of the previous step).
8	4/25/07 2:00 PM	Patricia A		<p><i>Release environment to users -</i></p> <p>Notify people of status by sending email to cms-psfin-upgrades@calpoly.edu.</p>
9	4/25/07 2:00 PM	Greg W.		If this instance is to have Integration Broker enabled, check configuration and correct configuration as necessary.

F8SLOCNV Clone

No	Date Planned	Responsible	✓	Task
10	4/25/07	George W.		Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.

F8SLODVL upgrade (cloned from FSLOPRD)

NOTE: This instance, the test environment, is normally cloned one week later than the other remaining instances so a instance is available at the previous release to try to track down any problems as being release generated.

F8SLODVL Clone and Rebuild				
No	Date Planned	Responsible	✓	Task
1	5/2/07	George W.		Make sure that each current SLO custom project not being inherited from PRD has an owner that will back it up by 5/1/07.
2	5/2/07	Kathy A. Greg W.		Backup SLO custom projects prior to DVL clone from PRD by copying each project to file. Failure to do so can result in the loss of current project definitions for each project missed.
3	5/2/07 6:30 AM or later	George W Patricia A		<ol style="list-style-type: none"> 1. Lock Environment (no more development) 2. Export Cal Poly projects as a backup. 3. Clone F8SLODVL from FSLOPRD 4. Reset Passwords 5. Restart the UNIX Applications Server pointed to the new release. 6. Copy the Cal Poly customized Crystal Reports to the F8SLODVL Crystal Reports directory (F8SLODVL/crw/eng). NOTE: Existing files must be renamed before and files with the same name can be copied in place. 7. Restart the NT Process Scheduler pointed to the new release. 8. Repair database links for F8SLODVL 9. Request that Cache's be cleared. <p>Ref CP# <u>222345</u></p>
4	5/2/07	George W.		Check that clone was successful.
5	N/A	George W.		<p>Tools Release Only:</p> <p>Check that SOSS has created the new web server for this instance and tools release. Reference ticket created in prep steps:</p> <p>Ref CMS# <u>00000, 00000, 00000</u></p>
6	5/2/07	George W.		<p>Tools Release Only:</p> <p>Update the upgraded environments links on the Cal Poly portal by updating the RSS files in the cmsrss account on the portal machines using the "Managing RSS pages for the My CalPoly PeopleSoft channels" procedure on the AIM/IM Internal Procedure pages.</p>
7	5/2/07	George W		<p>Campus files:</p> <ol style="list-style-type: none"> 1. Copy SQRs/SQCs from FSLOPRD 2. Copy any COMRs in already copied to DEV but not yet in FSLOPRD to the new structure. 3. Copy SQR bundle generated from the approved patches available (plus any SQRs/SQCs applied since production was upgraded) 4. Copy any SQRs/SQCs from the SLO Custom Objects Package <p>to the UNIX application server for the test environment using <i>cmsupd</i> utility.</p>

F8SLODVL Clone and Rebuild			
No	Date Planned	Responsible	✓ Task
8	5/2/07	George W.	Test Single Sign On access (if a tools release, you must wait for SOSS to finish their part of the previous step).
9	5/2/07 12:00 PM	Kathy A. Greg W.	Developers re-import their projects into F8SLODVL, by copying projects from file, and rebuild as necessary. They must let ITS/CMS DBAs know when they are done by emailing cms-psdba@calpoly.edu
10	5/2/07 12:00 PM	Greg W.	If this instance is to have Integration Broker enabled, check configuration and correct configuration as necessary.
11	5/2/07 3:00 PM		Run the sql scripts <pre>create_csu_select_role.sql create_csu_update_role.sql</pre> located in the "S:\ITS\AIM\IM\DBA\CMS\SQL Scripts" folder. NOTE: Scripts may be run in parallel to save time.
12	5/2/07 3:00 PM	George W	Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.
13	N/A	George W	Tools Release Only: Request that SOSS remove old version of web server for F8SLODVL, F8SLOTRN, F8SLOSTG and F8SLOCNV. Ref CMS# <u>00000, 00000, 00000</u>

F8SLOTST upgrade (cloned from F8SLODVL)

NOTE: This brings F8SLOTST up to the same level as the rest of the environments (upgraded by SOSS) as opposed to a variant that we upgraded.

F8SLOTST Clone				
No	Date Planned	Responsible	✓	Task
1	5/2/07	Patricia A		1. Clone FSLOPRD to F8SLOTST 2. Reset Passwords 8. Restart the UNIX Applications Server pointed to the new release. 3. Restart the NT Process Scheduler pointed to the new release. 4. Copy the Cal Poly customized Crystal Reports to the F8SLOTST Crystal Reports directory (F8SLOTST/crw/eng). NOTE: Existing files must be renamed before and files with the same name can be copied in place. 5. Repair database links for F8SLOTST 6. Request that Cache's be cleared. Ref CP# <u>222345</u>
2	5/2/07	George W		Check that clone was successful.
3	5/2/07	George W		Campus files: 1. Copy SQRs/SQCs from FSLOPRD 2. Copy any COMRs in already copied to DEV but not yet in FSLOPRD to the new structure. 3. Copy SQR bundle generated from the approved patches available 4. Copy any SQRs/SQCs from the SLO Custom Objects Package to the UNIX application server for the test environment using cmscp utility (plus any SQRs/SQCs applied since production was upgraded).
4	5/2/07	George W.		Test Single Sign On access (if a tools release, you must wait for SOSS to finish their part of the previous step).
5	5/2/07	Patricia A		<i>Release environment to users -</i> Notify people of status by sending email to cms-psfin-upgrades@calpoly.edu .
6	5/2/07	Greg W.		If this instance is to have Integration Broker enabled, check configuration and correct configuration as necessary.
7	5/2/07	George W		Update the upgrade log file on the ITS/AIM-IM CMS Web Pages.

NOTES: