



*Annual Oracle Applications & Data Warehouse Upgrades
Scope of changes document
September 13, 2007*

Scope of the Oracle Application and Data Warehouse Upgrade

Each year, during the fall, Yale upgrades its Oracle applications to maintain reliable services for Financial, Human Resources, Procurement and Reporting applications. This year the upgrade to the Oracle Applications and the Data Warehouse is scheduled for **October 12-14, 2007**.

Below are details on the schedule, training and communications. Please share this important information with all those on your staff who use the Oracle Applications and/or the Data Warehouse. We recognize that work will need to be adjusted because of this necessary outage and we would like to give everyone the opportunity to plan accordingly.

The upgrade is scheduled to begin Friday, October 12, 2007 at 5 p.m. and be completed by Monday, October 15, 2007 at 8 a.m.

- **Systems availability during the outage**
- **Impact to functionality of Oracle-related applications**
- **Additional information & communications**
- **Contact information**

Availability of systems during the outage

Some systems will be available but not fully functional while other applications will be totally unavailable.

Unavailable systems:

Accounts Payable	Labor Distribution (LD)
Accounts Receivable	Moveable Equipment Inventory
Brio Query (for the Oracle Application)	Parking
C&T and Casual Time Entry	Prizes and Awards
Capital Management System (CMS)	Procurement Inquiry
COEUS	Purchasing
Custom Commitments	RIF
Endowment Unit System	Risk Envision
FASB	Self Service Web Applications
Fixed Assets	START
Grants Management	STARS enterprise users (job applicants will be able to use the site)
Journal Staging Area (JSA)	SWAP
Kronos (excluding Time Clocks)	Web Invoice Payment (WIP)
HR Online Applications	



The Data Warehouse applications not available include:

- Data Warehouse Portal
- BUG Library
- Brio Query (for the Data Warehouse)

All DWH Portal and BUG reports have been tested and we have detected no performance issues. While we do not expect that users will experience any problems with their ad hoc queries, should there be a performance issue after the upgrade, users should contact dw.usersupport@yale.edu for support with troubleshooting their queries.

Applications with limited functionality:

Any system or application that depends on applications in Oracle, such as the PTAE0 Validator, may not be fully functional. These include any local applications that use Oracle and the following university-wide applications:

- Expense Management System (EMS)
- FAMIS
- FMT to LD
- Oracle Financial Analyzer (OFA)

Impact on functionality

As in the past, careful consideration is paid to the impact the upgrade will have on the end-user. This year the changes to the end-user are considered minor and orientation to the changes/training is being handled with documentation. The only real impact expected is to the Labor Distribution (LD) application. The documentation will be available online at <http://www.yale.edu/oboe/oracleupgrade> and will include descriptions of each change the user can expect along with screen shots.

The following operating systems and browsers combinations have been tested and certified to work with the upgraded applications.

- Windows XP Professional SP2 with Browser IE 6.x
- Windows XP Professional SP2 with Browser IE 7.x
- Windows 2000 Professional SP4 with Browser IE 6.x
- Macintosh OS 10.3.9 with Browser Safari 1.3.2
- Macintosh OS 10.4.10 with Browser Safari 2.0.4



Additional information & communications

Transactions in the Data Warehouse

Transactions, balances and commitments entered in to the Oracle Applications on Friday October 12th will not be available in the Data Warehouse for reporting until Tuesday October 16th.

SFTP

The SFTP server, Serenity (AKA Sal) will be available during the outages. All files sent to the SFTP server during the outage will be processed following the upgrade.

Communications to the user community

The BOP Meeting on Monday, September 24th and Monday, October 8th will include a review of upgrade schedules and an overview of training documentation.

ITS Communications will send out two reminders detailing the specific times the outage will occur and what applications it will affect. The first is this document that you are reading and the second reminder will be sent out on Wednesday, October 10. Any changes to the schedule will also be communicated via email from ITS Communications so pay particular attention to the content of these messages during the upgrade time. The upgrade information will also be featured on the ITS homepage the week before the upgrade.

In addition, regular updates will be available during the outage period at www.yale.edu/its/status.

Contacts

Please contact Roger Kennedy at <mailto:roger.kennedy@yale.edu> or 432-7528 or Andy Sgambato at <mailto:andrew.sgambato@yale.edu> 432-9708 if you have any additional questions about the upgrade.