SMACT Works®
Excellence with Integrity

ORACLE Gold Partner Cloud Standard

"Leading Practices for PeopleSoft Selective Adoption"

Presented by:

Peter Koutroubis, EVP of Operations

SMACT Works®
Excellence with Integrity

ORACLE Gold Partner Cloud Standard

S.M.A.C.T. = Social Mobile Analytic Cloud Technologies

- Founded in 2013 Oracle Cloud Partner
- Headquarters in Dublin, Ohio
- 150+ U.S. Based Oracle Specialized Expert

ISO Certified

- ISO 27001:2013 - Information Security
- ISO 9001:2015 - Quality Management

ORACLE ANALYTICS CLOUD

Managed Projects
Implementations
Module Add-ons
Assessments

ORACLE CLOUD

ORACLE Cloud Infrastructure

Application Managed Support Services
Functional Configuration
Report Development
Integration & Security

Individual On-demand Subject Matter Experts
Oracle Cloud (ERP, SCM, HCM, Student, CX)
Functional and Technical SMEs

ORACLE ERP CLOUD | ORACLE SCM Cloud | ORACLE HCM CLOUD | ORACLE EPM Cloud

ORACLE BUSINESS INTELLIGENCE

Managed Projects
Implementations
Module Add-ons
Assessments

ORACLE PeopleSoft

PeopleSoft

Application Managed Support Services
System and Database Administration
Custom Bolt-on Development
Integration & Security

Individual On-demand Subject Matter Experts
PeopleSoft (FSCM, HCM, Campus Solutions, CRM)
Functional and Technical SMEs

ORACLE PEOPLESOFT CAMPUS SOLUTIONS | ORACLE PEOPLESOFT ENTERPRISE HUMAN CAPITAL MANAGEMENT | ORACLE PEOPLESOFT ENTERPRISE FINANCIAL MANAGEMENT | kibana

Selective Adoption

Agenda:

Review PeopleSoft Selective Adoption and the related components.

Organize teams and processes to regularly deploy new functionality.

PeopleSoft Selective Adoption

Learning Objectives:

Understand the PeopleSoft components related to Selective Adoption.

Develop a strategy from reactive to a proactive PeopleSoft organization.

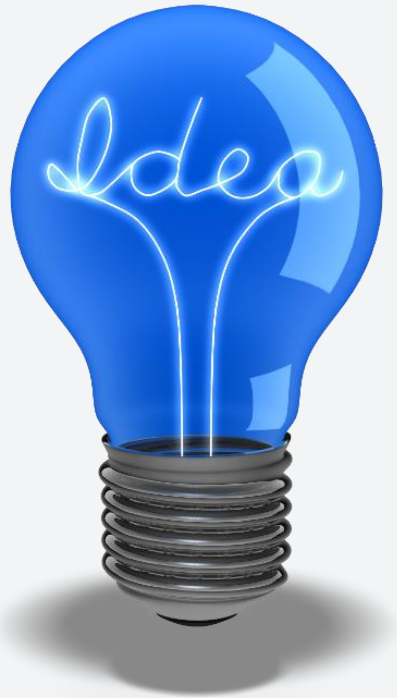
Develop a roadmap and set schedule for adopting features/functions.

3,749+ *New* Features - PeopleSoft *has innovated*

PeopleSoft is Innovative & Investing

- 930 ***HCM*** Features
- 927 ***FMS*** Features
- 356 ***SCM*** Features
- 145 ***CRM*** Features
- 516 ***Campus Solutions*** Features
- 724 ***PeopleTools*** Features
- 22 **iHub / Portal** Features
- 129 **PeopleSoft Cloud Manager** Features

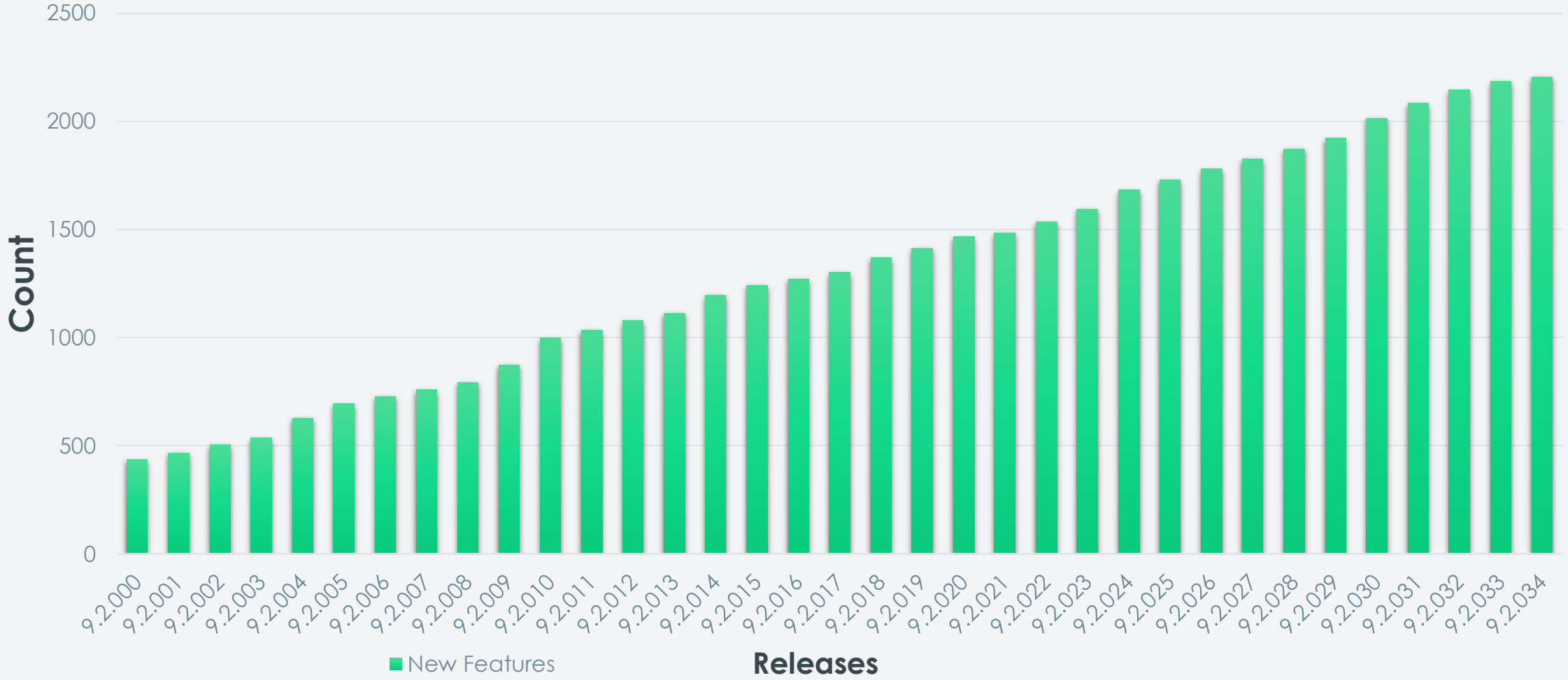
New Features as of September 2023, many more are planned



A lot of new ideas, turned into effective features

New Functions – 3,749 PeopleTools – 5.60

New Features - 9.2 – 9.2.x
HCM - FMS - SCM - iHub - CRM - CS



PeopleSoft Selective Adoption

Selective Adoption Process:
A process that customers select changes they want and when they want.

The Collection of PeopleTools that make up Selective Adoption:

- Change Assistant
- PeopleSoft Update Manager (PUM)
- PeopleSoft Test Framework (PTF)
- Data Migration Workbench
- Usage Monitor

PeopleSoft Selective Adoption

The Collection of PeopleTools that make up Selective Adoption:
Change Assistant: Stand alone, Windows based, Java program that orchestrates the process of updating or upgrading your system.

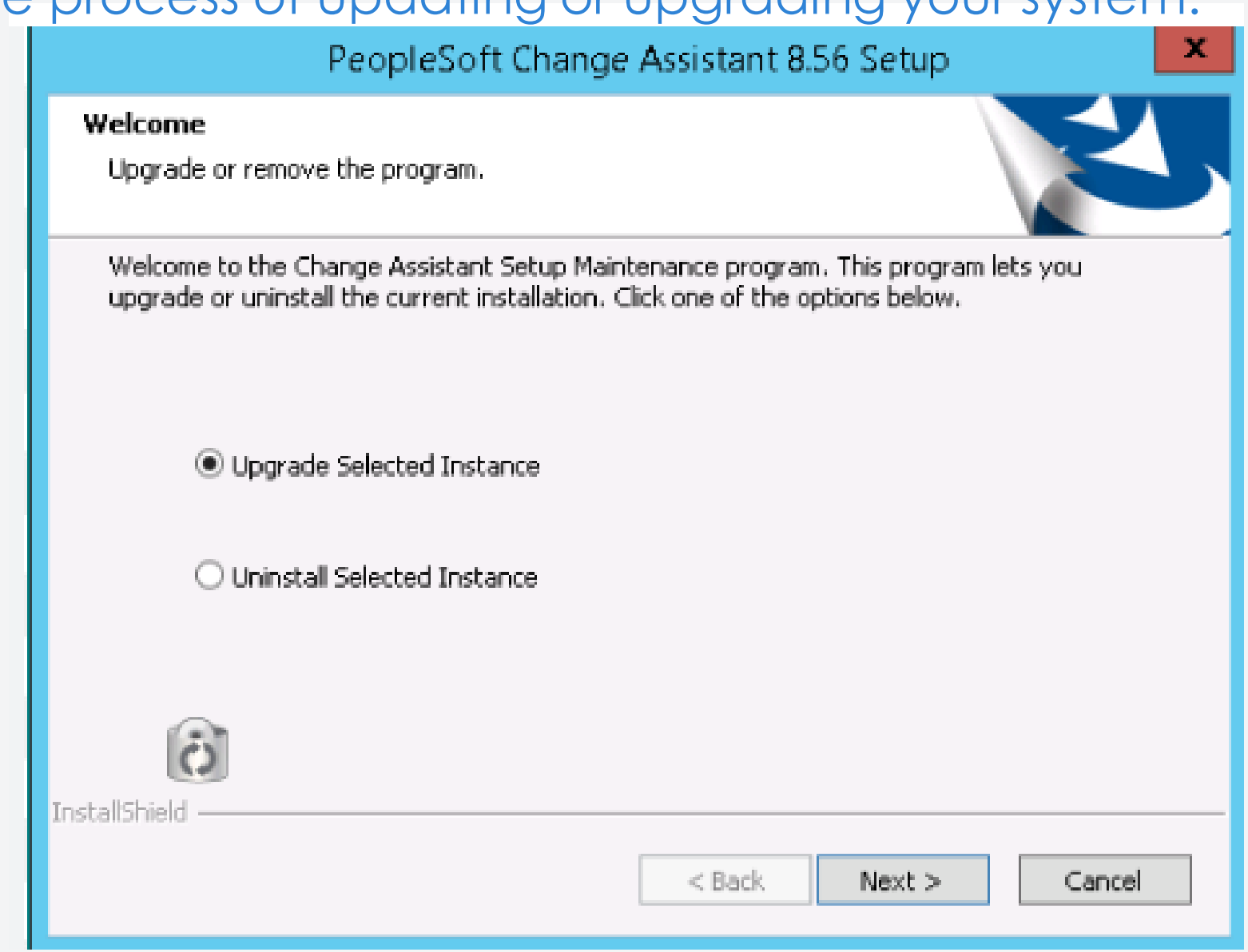
PeopleSoft Update Manager (PUM): Lifecycle management process used with the PUM PIA application, which runs on the PeopleSoft Image (PI) database.

PeopleSoft Test Framework (PTF): Test plans and test scripts for PeopleSoft test automation.

Data Migration Workbench: Facilitates the configuration management process using Application data sets. Designed to manage the complexity of migrating configuration data across multiple PeopleSoft systems.

Usage Monitor: Provides additional information for analysis when determining test coverage with PTF.

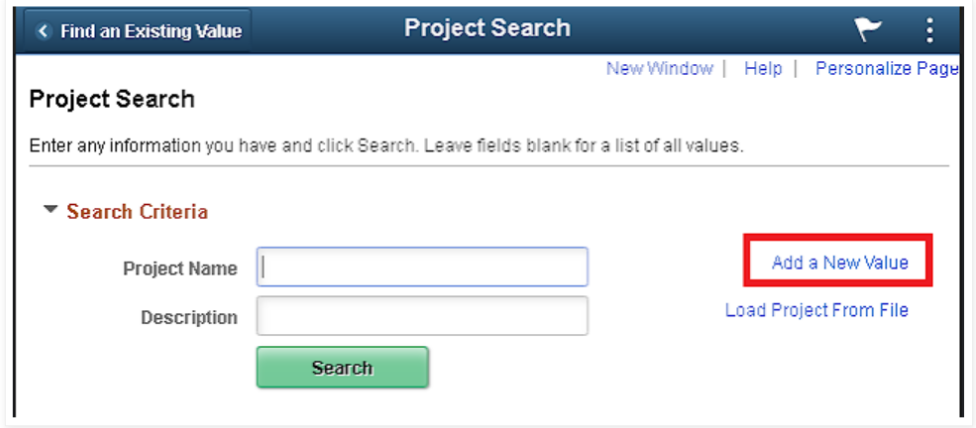
Change Assistant: Stand alone, Windows based, Java program that orchestrates the process of updating or upgrading your system.

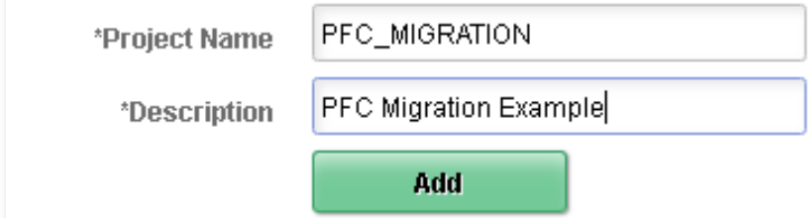


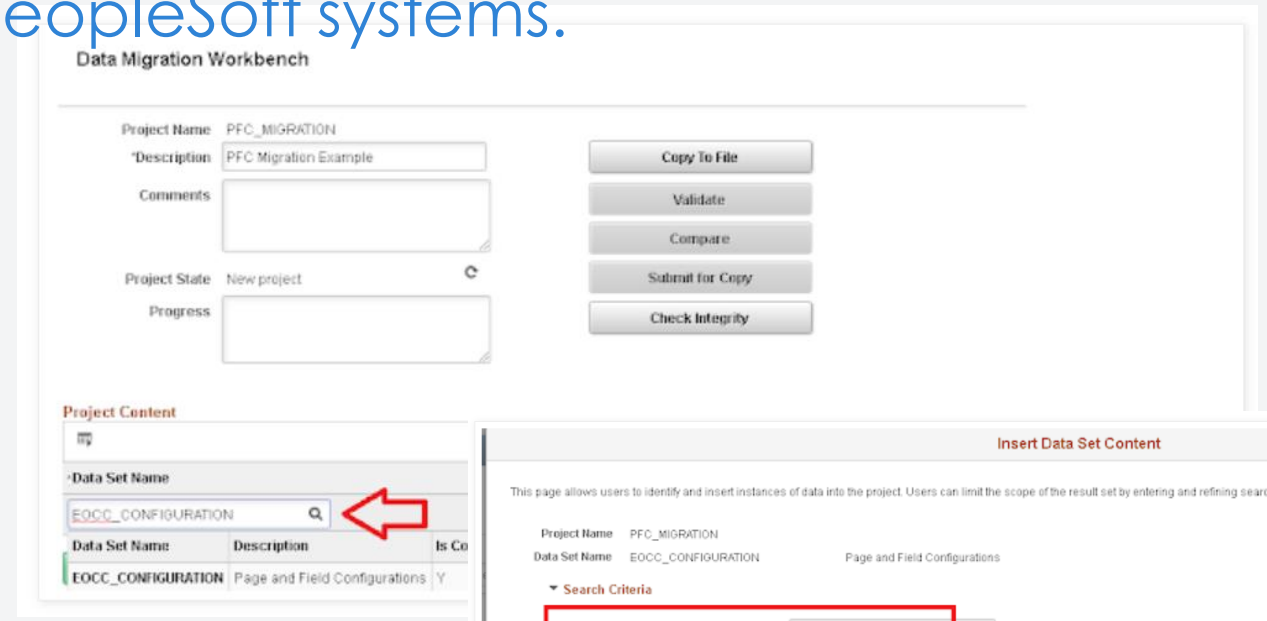
PeopleSoft Update Manager (PUM): Lifecycle management process used with the PUM PIA application, which runs on the PeopleSoft Image database.

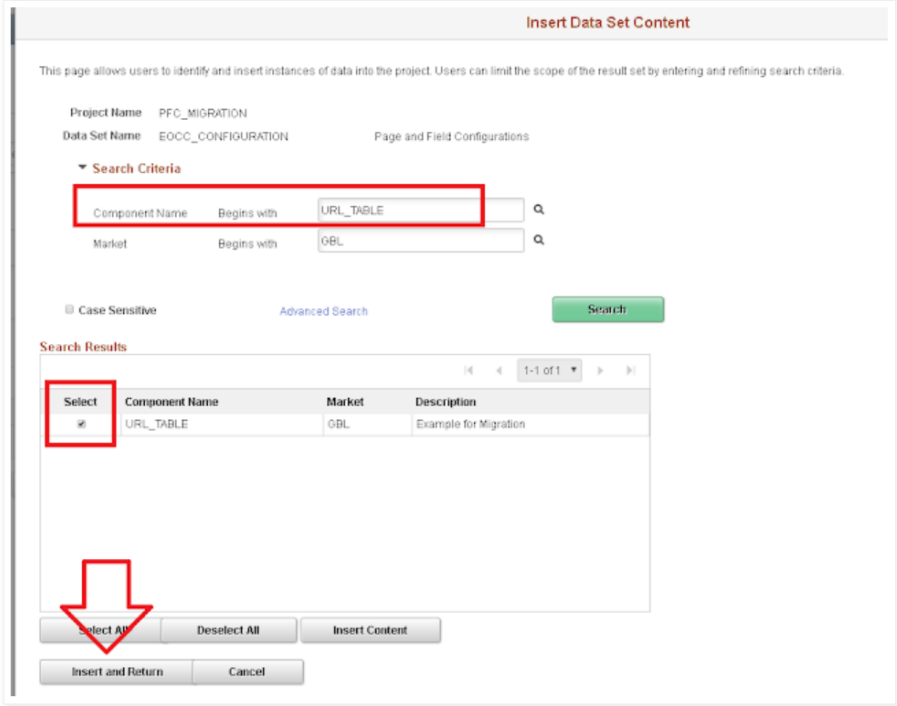
Data Migration Workbench: Facilitates the configuration management process using Application data sets. Designed to manage the complexity of migrating configuration data across multiple PeopleSoft systems.

PeopleTools > Lifecycle Tools > Migrate Data > Data Migration Workbench

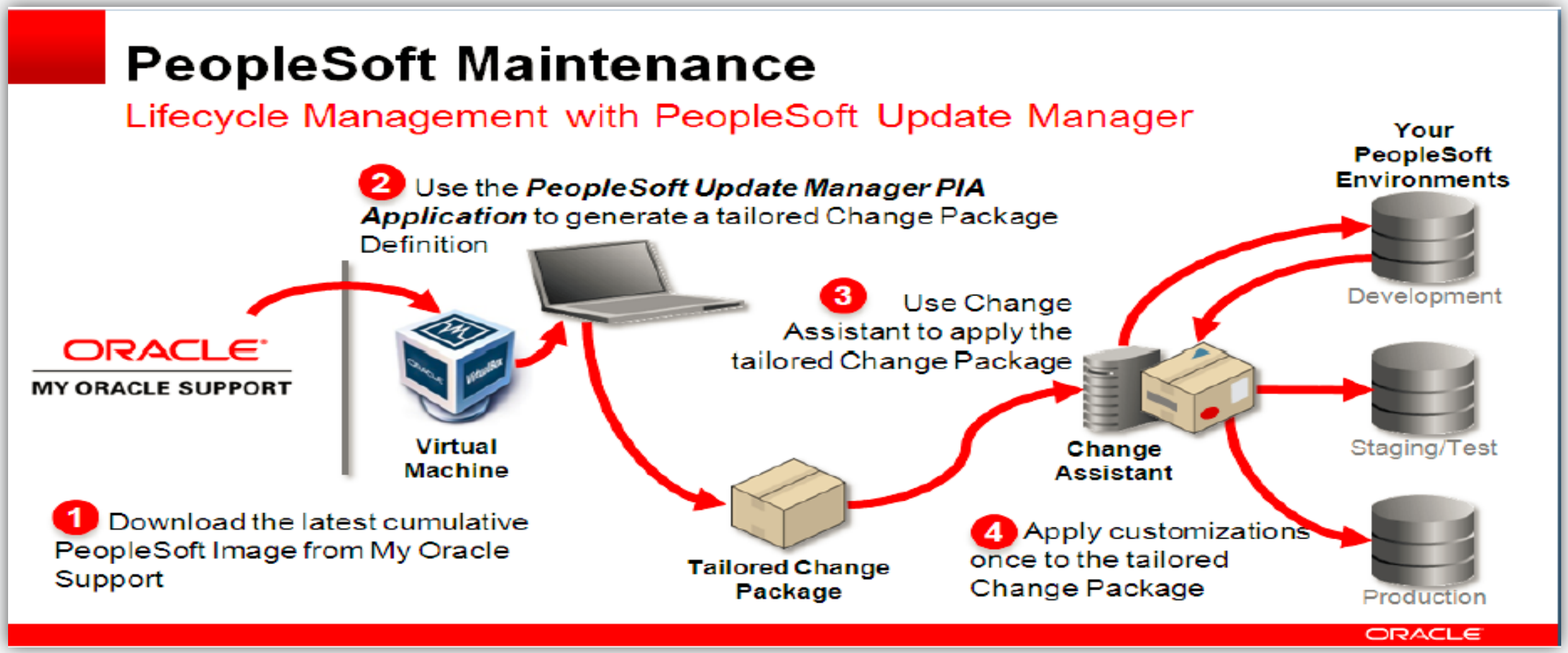








PeopleSoft Selective Adoption



PeopleSoft Selective Adoption Strategy

Key Concepts of Selective Adoption

Key Concepts of Selective Adoption

Oracle changed the availability of PeopleSoft updates. Oracle has a "Continuous Delivery Model" – initially it was every quarter.

- Delivery of New Features 3 Times a Year
- Get New Features without Upgrading
- Take only the New Features You Want, When You Want
- Maintenance Changes Automatically Included

PeopleSoft Continuous Delivery Model Comparison	
Old: Bundles and Updates	New: Selective Adoption
Frequent maintenance	Frequent maintenance
Take all maintenance	Take selective maintenance
Recommend staying current	Client Determines stay current strategy
Infrequent enhancements	Frequent enhancements
Major upgrade every 3–4 years	No major upgrades
No incremental changes	Incremental changes 3 times/year

PeopleSoft Selective Adoption Change

Does not eliminate the typical activities associated with change or long term need to update the incrementally releases to the system:

- Business Process
  - Assess and Prioritize desired feature release adoption with the functional users
  - Scheduling time for incremental changes verses periodic major changes
  - Develop a sensible maintenance strategy

- Testing Cycle
- End User Training

Oracle's Lifetime Support Policy

Oracle's maintenance policies have changed:

Oracle used to recommend staying current with and apply bundles in the correct sequence which no longer apply in the Selective Adoption Process:

- Users can now skip maintenance or choose what to apply.
- Applying changes is easier in 9.2 allowing people to more easily stay current.

Lifetime Support Policy Components at a Glance

	Premier Support	Extended Support	Sustaining Support
Major Product and Technology Releases	✓	✓	✓
Technical Support	✓	✓	✓
Access to Knowledge Base (Oracle MetaLink/ PeopleSoft Customer Connection/Siebel SupportWeb)	✓	✓	✓
Updates, Fixes, Security Alerts, datafixes, and Critical Patch Updates	✓	✓	Pre-Existing Only
Tax, Legal, and Regulatory Updates	✓	✓	No
Upgrade Scripts	✓	✓	Pre-Existing Only
Certification with most existing Third-Party Products	✓	✓	No
Certification with most new Third-Party Products	✓	No	No
Certification with most new Oracle products	✓	No	No
Certification with most existing Oracle products	✓	✓	No

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Updates, Fixes, Security Alerts, datafixes, and Critical Patch Updates	✓	✓	Pre-Existing Only
Tax, Legal, and Regulatory Updates	✓	✓	No
Upgrade Scripts	✓	✓	Pre-Existing Only
Certification with most existing Third-Party Products	✓	✓	No
Certification with most new Third-Party Products	✓	No	No
Certification with most new Oracle products	✓	No	No
Certification with most existing Oracle products	✓	✓	No

Link: https://www.oracle.com/us/assets/lifetime-support-applications-069216.pdf

Oracle's Lifetime Support Policy

Oracle's PeopleSoft Continuous Innovation Releases

Effective 9-25-23

Oracle PeopleSoft Continuous Innovation Releases

Product	Latest Release	GA Date	Premier Support Through at least	Extended Support	Sustaining Support
CRM	21	Aug 2023	Dec 2034	Not Applicable	Indefinite
CS	29	Jun 2023	Dec 2034	Not Applicable	Indefinite
ELM	23	Jul 2023	Dec 2034	Not Applicable	Indefinite
FMS/ESA/SCM	48	Jul 2023	Dec 2034	Not Applicable	Indefinite
HCM [2]	47	May 2023	Dec 2034	Not Applicable	Indefinite
Portal Solutions	16	Jul 2023	Dec 2034	Not Applicable	Indefinite

For additional details see the Lifetime Support Summary for PeopleSoft Releases (Doc ID 2238983.2).

PeopleSoft / PeopleTools Premium Support Policy

PeopleTools Premium Support:

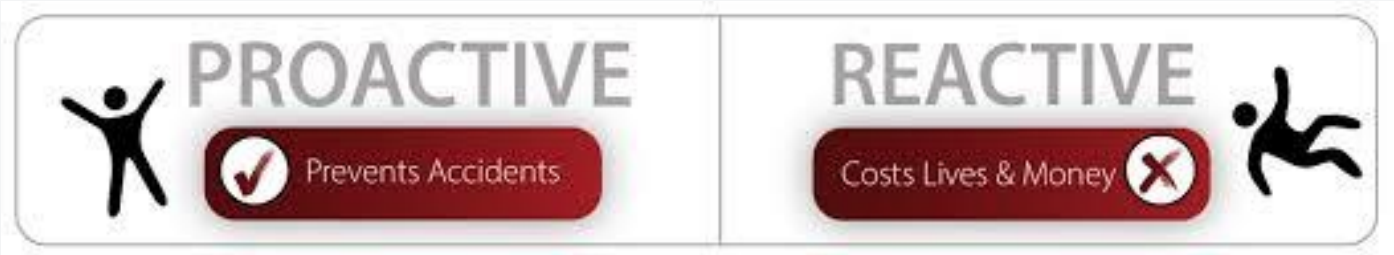
- Available until the next release of PeopleTools (every 12-18 months between) is released then for an additional twelve (12) months. Then Extended Support (limited) for twelve more months before entering Sustaining Support.

- Customers must be on the latest release of PeopleTools to take advantage of the latest features related to the product set.

Proactive Organization

A proactive Organization will create the business processes and inter-departmental synergy to capitalize on the benefits of the continuous innovation delivery model in all PeopleSoft pillars they have in production (HCM, FMS, SCM, CS, CRM)

- Interdepartmental Collaboration
- Business to Information Technology
- Research, Planning, Analysis
- System Implementation
- Testing



Proactive Organization

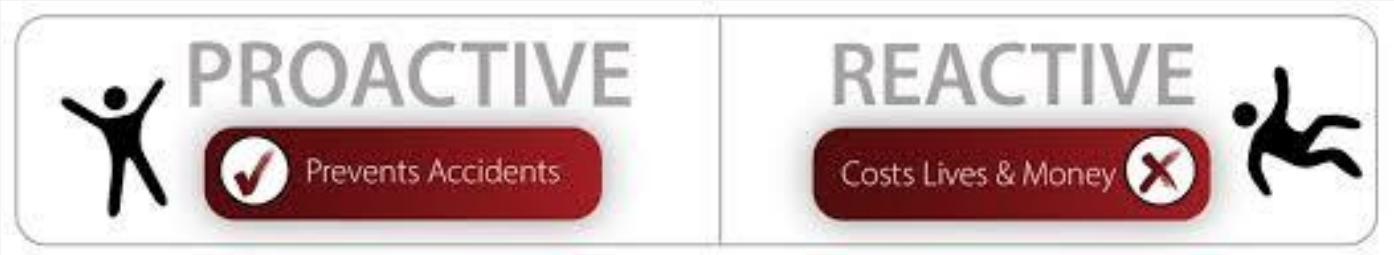
Who is involved?

All Pillars OR Business Units:
HCM, FMS, SCM, CRM, CS

Information Technology Group

What is involved?

- Focus on incremental changes
- Stay current with PeopleTools
- Create an annual schedule
- Frequent maintenance
- Automate testing



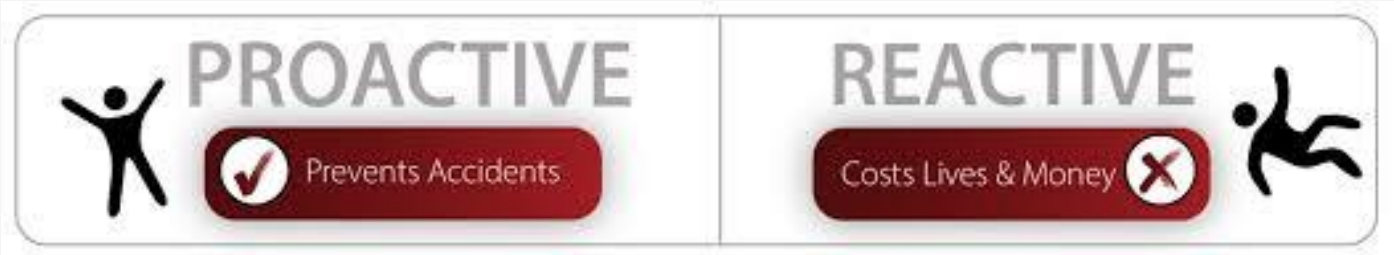
Proactive Organization

What has changed?

No More Upgrades
Projects are different
Roles have changed

What is the impact?

- Cost of updates budgeted annually; Funding distributed
- Business Analyst (BA) must look at the maintenance delivered in PUMs
- BA & IT must analyze PUMs to against customization for replacement
- Review of maintenance log to determine what maintenance should be applied



Planning an annual schedule

Schedule maintenance, new features, and customization review

- Maintenance:
  - Bug Fix, Legislation & Regulation
  - System readiness; Opportunity cost
  - Stay current
- Enhancements:
  - Evaluated
  - Rolled out incrementally

Planning an annual schedule

Example Scheduled	Task Name	2022	2023										
		Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Minor release 4 times annually	**Minor Maintenance Release**													
1.5 to 2 month projects	Minor Release A													
Regulations and Bug Fix	Minor Release B													
Minor User Requests	Minor Release C													
Feb, May, August, Nov	Minor Release D													
Major Release 2 times annually	**Major Release**													
5 month projects	Primary													
New Enhancements	Secondary													
Stay current plan														
April, September														

PeopleTools Maintenance

PeopleTools Premium Support:

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- Customers must be on the latest release of PeopleTools to take advantage of the latest features related to the product set.

HCM Product(s)	Feature	Introduced In Version / Image	PeopleTools	Bug ID
Candidate Gateway	Added the ability to enable Screen Reader mode dynamically in Fluid Candidate Gateway and for applicants to set preferences for accessibility. This capability eliminates the need to set up different sites for Standard versus Screen Reader mode in Fluid Candidate Gateway.	HCM 9.2 Update Image 39 (9.2.039)	8.59.00	32631482
Enterprise Learning Management	Enhanced the Chatbot Integration Framework Core Services to make it compliant with Oracle REST Standard.	ELM 9.2 Update Image 22 (9.2.022)	8.59.00	33244310
General HCM Enhancements	Added enhancements to support portal navigation search enhancements in 8.59, which include updates to portal labels, descriptions, keywords, and synonyms.	HCM 9.2 Update Image 39 (9.2.039)	8.59.00	32903738
General HCM Enhancements	Added the Review Navigation Search Updates utility, which enables you to review updated content reference labels, descriptions, and keywords delivered in Navigation Search Updates. The utility also enables you to manage which updates are applied to your production environment.	HCM 9.2 Update Image 41 (9.2.041)	8.59.00	33528455
General HCM Enhancements	Added the Global Chatbot Configuration component, which enables you to create a global chatbot that is visible across all components within a PeopleSoft portal.	HCM 9.2 Update Image 42 (9.2.042)	8.59.00	33851423
Human Resources	Added the ability to enable Real Time Indexing (RTI) for the Job search index (HC_HR_JOB_DATA) to transmit data to Search when transactions are saved. This allows near real-time updates to your indexed data. This feature uses PeopleTools search technology and is recommended for PeopleTools release 8.59.07 or higher.	HCM 9.2 Update Image 42 (9.2.042)	8.59.04	33854968
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Time and Labor	Delivered the Payable Time Trend and Payable Time Insights dashboards, which enable administrators and management to view visualizations for payable time data based on the Payable Time Search index. The index should be enabled for real time indexing, which is recommended for PeopleTools release 8.59.07 or higher.	HCM 9.2 Update Image 42 (9.2.042)	8.59.04	33851134
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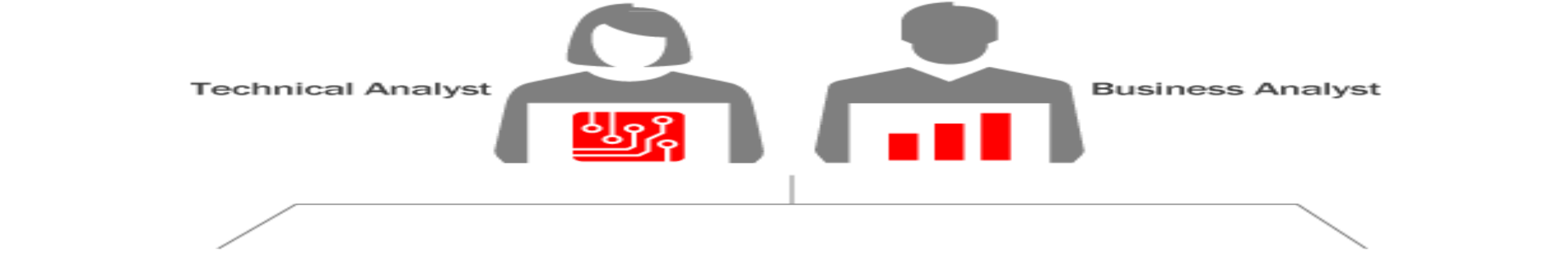
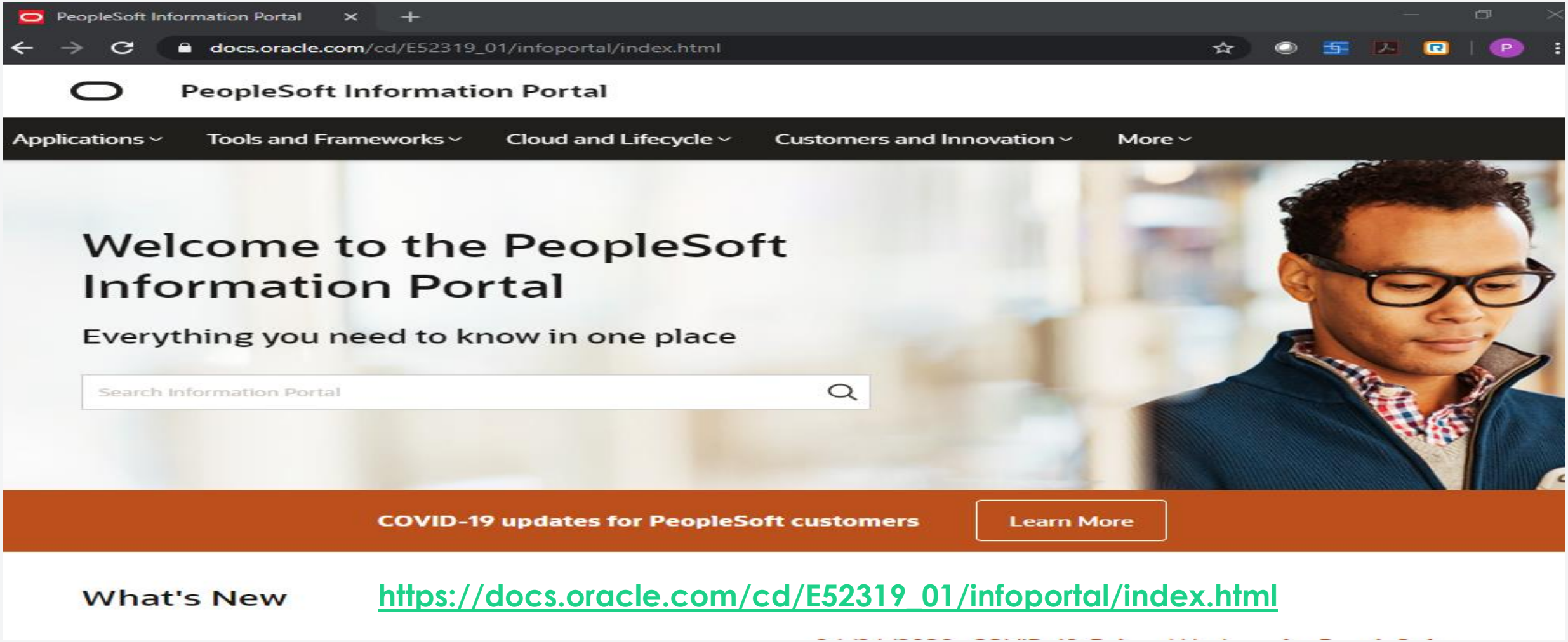
IT and Business Up-to-Date on Features and Changes



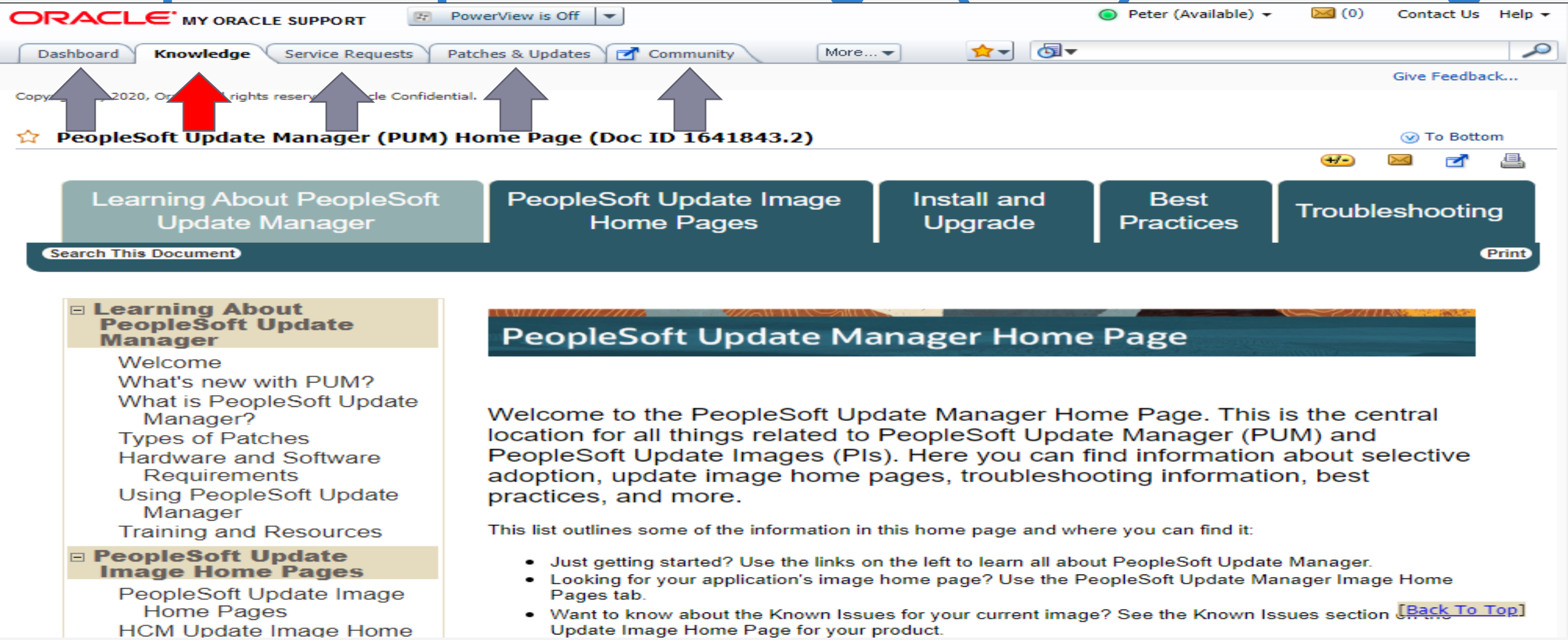
PeopleSoft Information Portal	PeopleSoft Update Manager Homepage	Cumulative Feature Overview	Planned Features and Enhancements	PeopleSoft Update Manager Dashboard
https://docs.oracle.com/cd/E52319_01/infoportal/psa.html	https://support.oracle.com/epmos/faces/DocumentDisplay?id=1641843.2	https://apexapps.oracle.com/pls/apex/f?p=10319:8:3279700082317::NO::P8_PRODLINE:CS	https://support.oracle.com/epmos/faces/DocumentDisplay?id=1966243.2	https://docs.oracle.com/cd/F13640_01/pt857pbr2/eng/pt/tswu/task_CreatingChangePackage.html?pli=ul_d177e145_tswu?pli=ul_d177e145_tswu

PeopleSoft Information Portal



https://docs.oracle.com/cd/E52319_01/infoportal/index.html

PeopleSoft Update Manager (PUM) Home Page



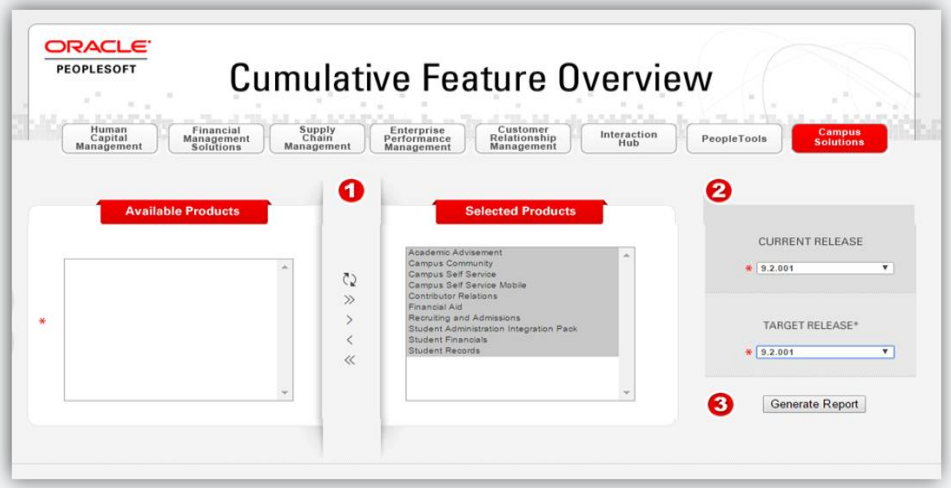
https://support.oracle.com/epmos/faces/DocumentDisplay?id=1641843.2

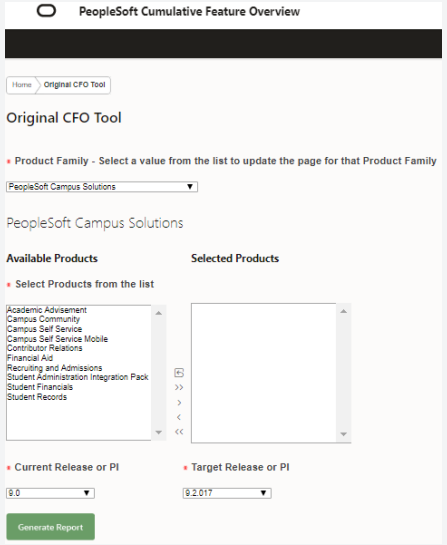
Oracle's Cumulative Feature Overview Tool

Cumulative Feature Overview (CFO) Tool

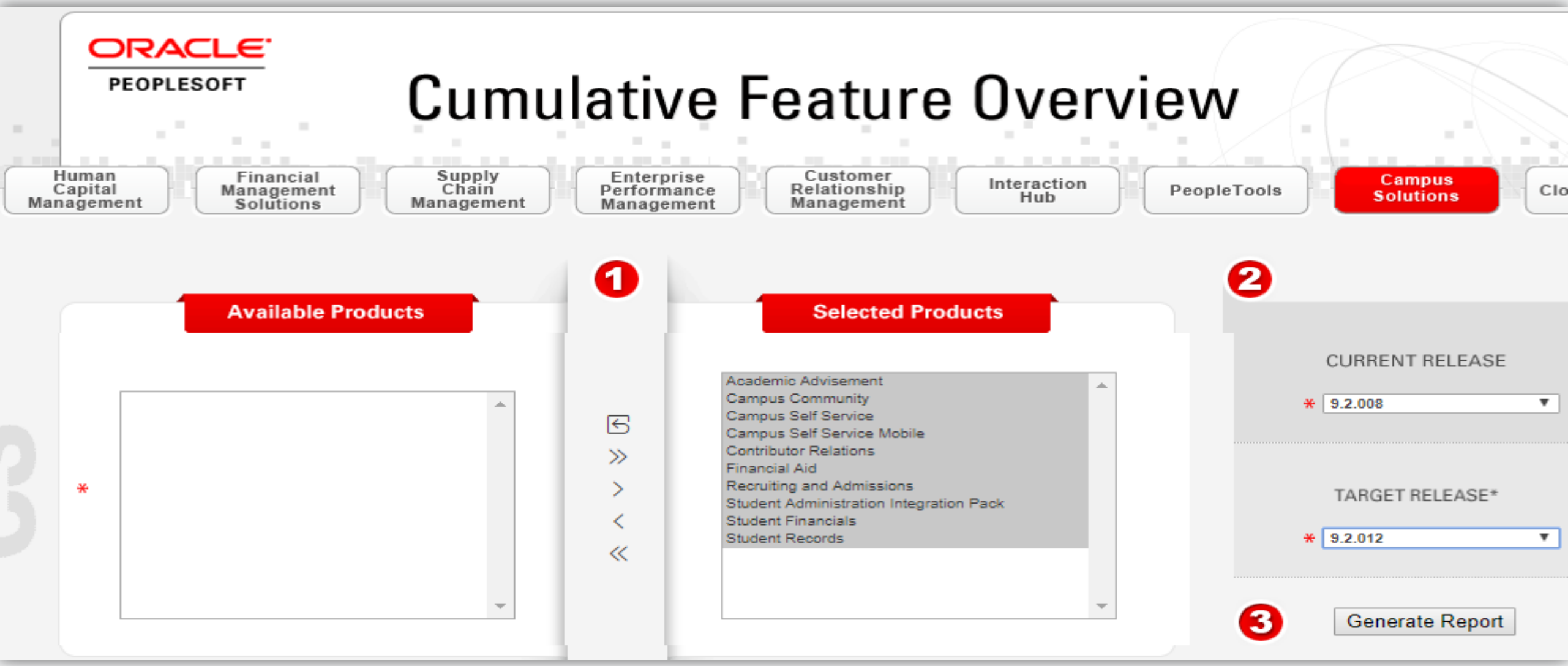
Oracle's online Reference guide to features and change related to PeopleSoft application releases. Show the latest PeopleSoft features available by suite of product (HCM, FSCM, CS, CRM, etc.) shows the corresponding version PeopleTools required to supports that them.

CFO LINK: https://apexapps.oracle.com/pls/apex/f?p=10319:8:3279700082317::NO::P8_PRODLINE:CS





Oracle's Cumulative Feature Overview Tool



Oracle's Cumulative Feature Overview Tool

ORACLE PEOPLESOFT

Home > CFO Page > Report

Product(s)	Feature	Version	Introduced In Image/Bundle	Minimum Peopletools Version
Academic Advisement	Enhanced the View Academic Progress Summary Chart to allow institutions to choose the values used in the pie chart based on configuration options. The configuration options allow the institution to select the data source option of Unit Based, Course Based or Combined Unit and Course. An optional weighting field value allows for a more balanced calculation with the Combine Unit and Course option.	9.2.010	CS 9.2 Update Image 10. My Oracle Support - PeopleSoft Planned Features and Enhancements- Doc ID 1966243.2.	8.55
Campus Community	Previously, a maximum of 2 agreement pages could be defined in Task Configuration for use in an activity guide. The Task Management Framework and Task Configuration now allows for the inclusion of up to 9 agreement pages in a Fluid activity guide.	9.2.009	CS 9.2 Update Image 9. My Oracle Support - PeopleSoft Planned Features and Enhancements- Doc ID 1966243.2.	8.53.10

Oracle's Cumulative Feature Overview Tool

Product(s)	Feature	Introduced In Version / Image	Minimum PeopleTools Version	Bug ID	Documentation	Video Feature Overview

PeopleSoft FMS 9.2	#
Asset Lifecycle Management	1
Asset Management	88
Banks Setup and Processing	11
Billing	58
Cash Management	19
Commitment Control	5
Contracts	32
Deal Management	6
Enterprise Components	4
Expenses	68
Financial Gateway	2
General FSCM Enhancements	121
General Ledger	107
Global Components	8
Global Options and Reports	9
Grants	37
In-Memory Project Discovery	5
In-Memory Real Time Bottom Line	8
Lease Administration	19
Maintenance Management	38
Payables	89
Program Management	5
Project Costing	37
Real Estate Management	23
Receivables	85
Resource Management	16
Staffing Front Office	2
Treasury	5
eBill Payment	12
eSettlements	7
Total	927

PeopleSoft SCM 9.2	#
Catalog Management	1
Enterprise Components	3
General FSCM Enhancements	111
Global Components	4
Global Options and Reports	1
Inventory	19
Mobile Inventory	5
Mobile Inventory Management	12
Order Management	8
Purchasing	78
Services Procurement	10
Strategic Sourcing	17
Supplier Contract Management	25
Supply Planning	1
eBill Payment	1
eProcurement	57
eSupplier Connection	3
Total	356

PeopleSoft Cloud Manager	#
Backup and Restore	4
Cloud Manager Update and Upgrade	3
Environment Provisioning	72
Governance	7
Install and Configure	20
Lift and Shift	13
PeopleTools Upgrade and Patching	7
Selective Adoption	3
Total	129

PeopleSoft CS 9.2	#
Academic Advisement	13
Campus Community	102
Campus Self Service Mobile	1
Contributor Relations	1
Financial Aid	181
General CS Enhancements	27
Recruiting and Admissions	44
Student Financials	29
Student Records	118
Total	516

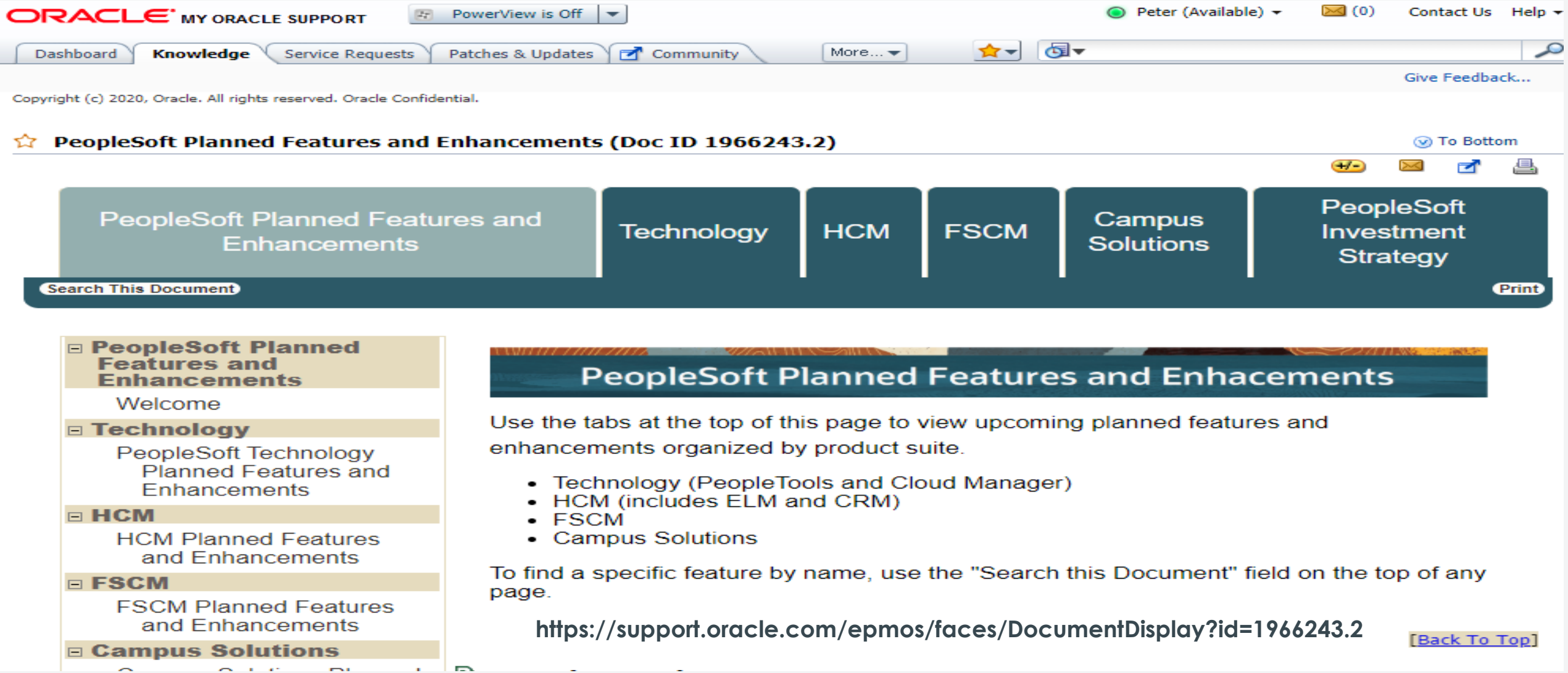
PeopleSoft CRM 9.2	#
Application General Information	6
CRM for Higher Education	3
General CRM Enhancements	63
HelpDesk	1
HelpDesk for Human Resources	46
Information Technology HelpDesk	7
Multichannel Communications	3
Online Marketing	5
Service Center for Higher Education	1
Support	7
Workforce Communications	3
Total	145

PeopleSoft iHUB	#
Application General Information	1
Branding	3
Content Management	1
General Enhancements	13
Related Content Services	3
Site Management	1
Total	22

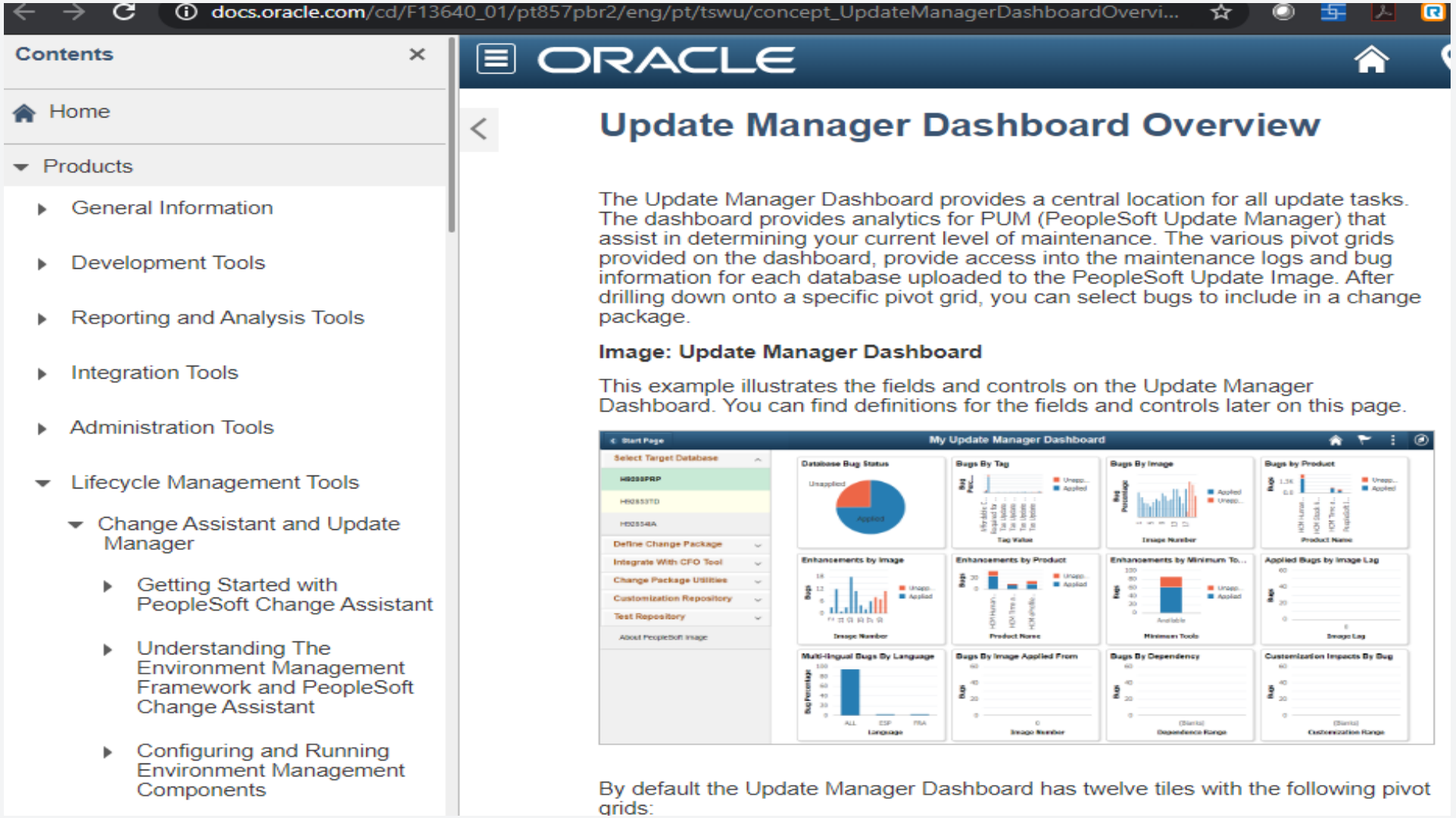
PeopleSoft HCM 9.2	#
Absence Management	44
Benefits Administration	24
Candidate Gateway	26
Enterprise Learning Management	87
General HCM Enhancements	119
Global Payroll	40
Global Payroll for Australia	8
Global Payroll for Brazil	17
Global Payroll for China	1
Global Payroll for France	5
Global Payroll for Hong Kong	1
Global Payroll for India	3
Global Payroll for Japan	3
Global Payroll for Mexico	3
Global Payroll for New Zealand	2
Global Payroll for Singapore	1
Global Payroll for Spain	1
Global Payroll for Switzerland	3
Global Payroll for Thailand	1
Global Payroll for United States	4
Global Payroll for the United Kingdom	6
Human Resources	220
In-Memory Labor Rules and Monitoring	1
Payroll Interface	1
Payroll for North America	71
Talent Acquisition Manager	39
Time and Labor	81
eBenefits	13
eCompensation	6
eCompensation Manager Desktop	7
eDevelopment	10
ePay	12
ePerformance	35
eProfile	12
eProfile Manager Desktop	23
Total	930

PeopleTools 8.60	#
Accessibility	12
Application Data Sets	22
Application Designer	28
Application Engine	13
Automated Configuration Management	12
BI Publisher	23
Change Assistant	23
Component Interfaces	3
Data Distribution Framework	2
Data Management	4
Data Migration Workbench	5
Data Mover	3
Documents Technology	1
Global Technology	5
Health Center	6
Install	21
Integration Broker	23
Lifecycle Management	3
Mobile Application Framework	15
MultiChannel Framework	8
PeopleCode	42
PeopleSoft Fluid User Interface	56
Performance Monitor	4
Pivot Grid	55
Portal Technology	77
Process Scheduler	21
Push Notifications	2
Query	28
Reporting Web Services	3
SQR	4
Search Technology	57
Security Administration	40
Simplified Analytics	3
System and Server Administration	30
Test Framework	32
Tree Manager	2
Update Manager	26
Usage Monitor	1
User Interface	2
Workflow Technology	2
nVision	5
Total	724

Planned Features and Enhancements



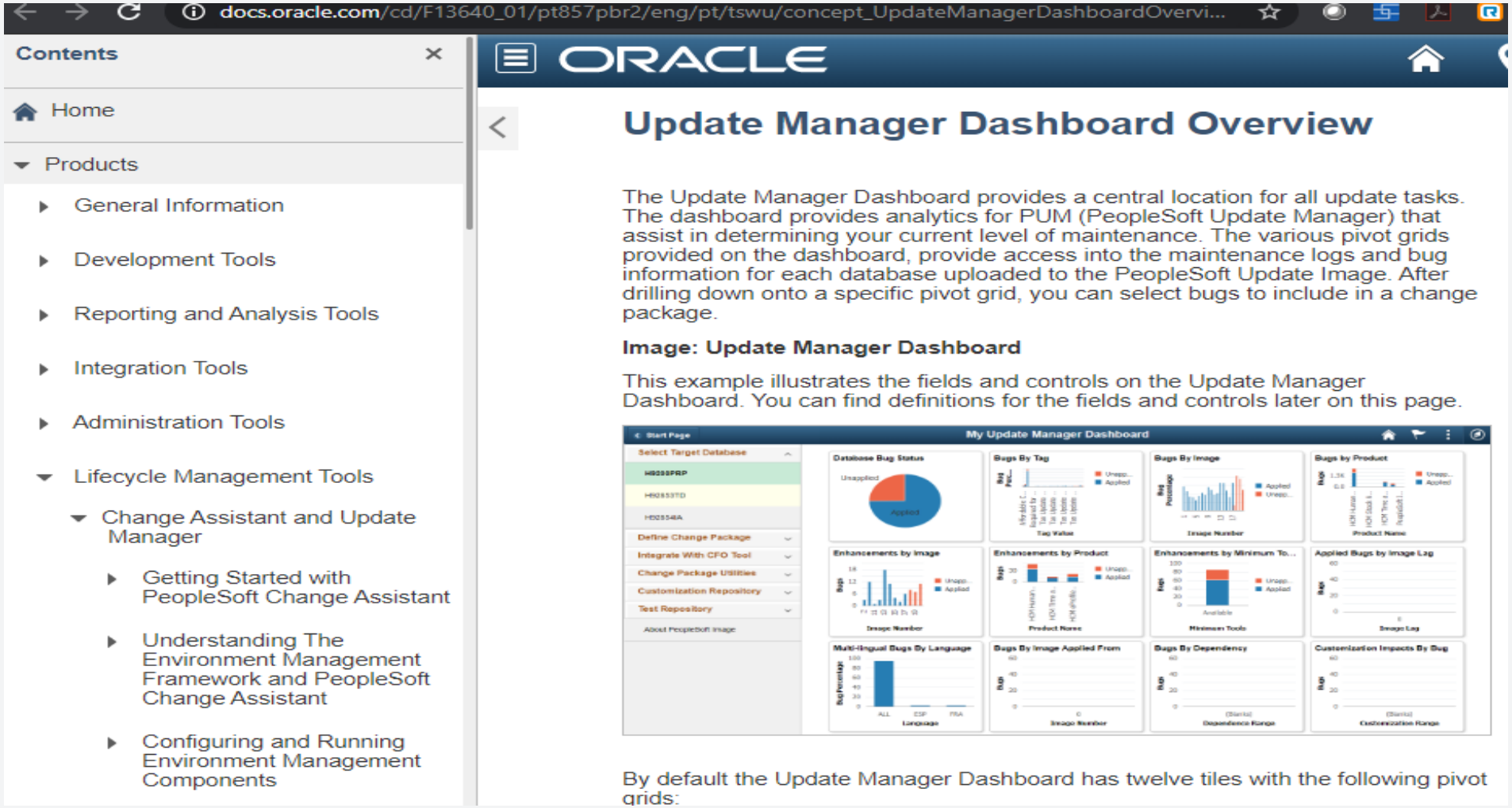
PeopleSoft Update Manager Dashboard



1.Database Bug Status
2.Bugs by Tag
3.Bugs by Product
4.Bugs by Image
5.Enhancements by Image
6.Enhancements by Product
7.Enhancements by Minimum Tools
8.Applied Bugs by Image Lag
9.Multi-lingual Bugs by Language
10.Bugs by Image Applied From
11.Bugs by Dependency
12.Customization Impacts by Bug

https://support.oracle.com/epmos/faces/DocumentDisplay?id=1641843.2

PeopleSoft Update Manager Dashboard



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5. Enhancements by Image
6. Enhancements by Product
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9. Multi-lingual Bugs by Language
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12. Customization Impacts by Bug

https://support.oracle.com/epmos/faces/DocumentDisplay?id=1641843.2

Guiding Tools & Deployment Strategy

Organization is in control, what to apply & when to apply (pick and choose)

- Tax, Regulatory, Security, Critical updates, & PeopleTools patches
- Low-cost high impact/value
- Other features & PT upgrade every 12-16 months

https://docs.oracle.com/cd/E52319_01/infoportal/psa.html#StayInformed

Guiding Tools for your environment by release

- PUM Manager Homepage
- PUM Manager Dashboard

https://docs.oracle.com/cd/E66686_01/pt855pbr1/eng/pt/tswu/concept_UpdateManagerDashboardOverview.html

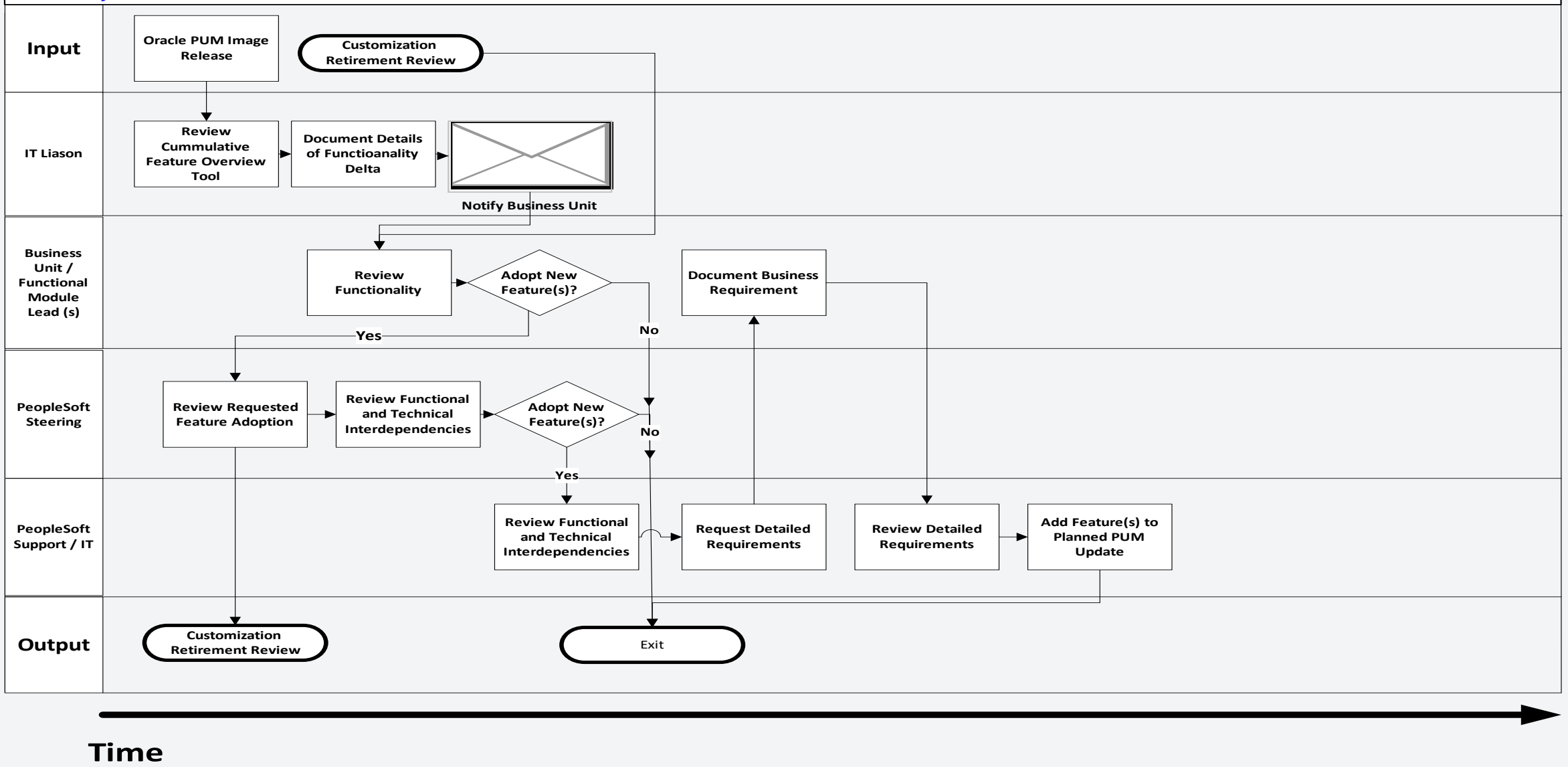
Note: If you wait for years to get up to date on PUM images, the effort is large, and you've lost time using the new features.

DESCRIPTION

PeopleSoft Selective Adoption PUM Image Review

Superior Process Name: PeopleSoft Support

Created By: Peter Koutroubis Created Date: 11/18/2020 Version#: 1.0

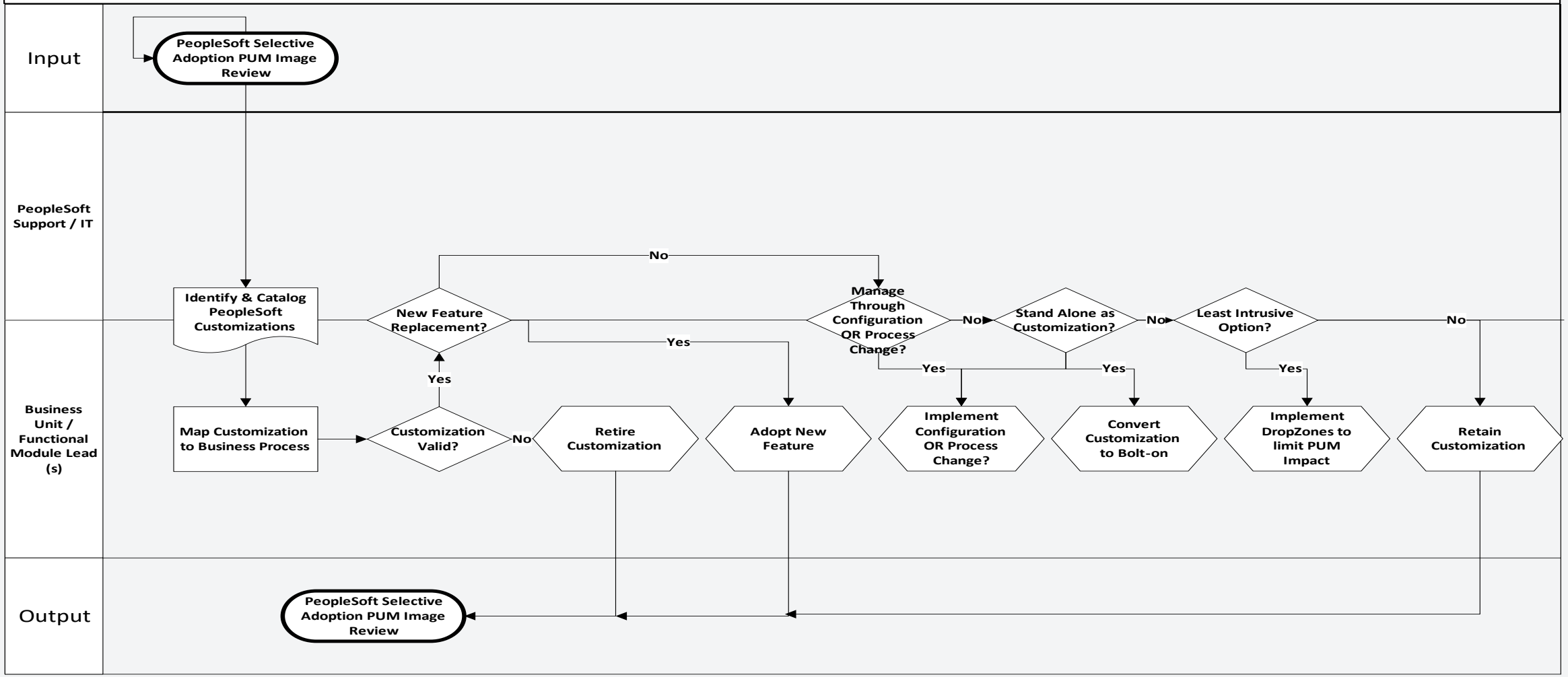


DESCRIPTION

PeopleSoft Customization Retirement Review

Superior Process Name: PeopleSoft Selective Adoption PUM Image Review

Created By: Peter Koutroubis Created Date: 11/18/20 Version#: 1.0



Time

PeopleSoft Test Automation Strategy

Testing is the largest part of any project:

- PeopleSoft Testing Framework vs testing automation tools
- Modification of test scripts to account for customization

Start your regression tests by:

- Automating testing of mature / stable products, not new development
- Have functional users design tests and technical users build and run tests
- Implementing a test documentation policy, which is key

Build repeatable portable tests (PTF):

- Migrate tests from environments
- Page prompting allows for direct page access (navigation free)
- Scroll prompting to identify by key not index
- Cross reference reports

PeopleSoft Selective Adoption

Conclusion:

- Selective Adoption Process works for maintenance and feature updates
- Successful organizations understand PUM and establish processes to take advantage
- Features are available to customers every quarter

PeopleSoft Selective Adoption

How SMACT optimizes your organizational PeopleSoft Selective Adoption Strategy?

SMACT was conceived, designed, built and evolved solely to provide PeopleSoft service. SMACT has a unique PeopleSoft Selective Adoption Strategy with the following.

- Developing a transition strategy from a reactive organization to PeopleSoft proactive
- Developing a roadmap and set schedule for adopting features and functions
- Full managed services for the application of PUM Images, Fixes, and Features
- Full managed services for PeopleSoft PeopleTools upgrades
- Security and Testing Automation service options to complete the adoption process

धन्यवाद
Hindi

多謝
Traditional Chinese

どうも
Japanese

ขอบคุณ
Thai

Спасибо
Russian

Gracias
Spanish

شكراً

Thank You

Telagu

Obrigado
Brazilian Portuguese

Grazie
Italian

Danke
German

Merci
French

Ἐπαινῶ
Ancient Greek

நன்றி
Tamil

多谢
Simplified Chinese

감사합니다
Korean

Yuscotoya
Zulu

ありがとうございました
Japanese

Ευχαριστώ
Modern Greek

SMACT Works®

Excellence with Integrity

PLEASE GET IN TOUCH

pkoutroubis@smactworks.com

727-421-3170

Thank you!

Northwest

NorthwestOracleUsersGroup

PeopleSoft NorthWest REGIONAL USERS GROUP

Summit