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# PeopleSoft Spotlight Series

## Selecting and Applying Maintenance Best Practices and Recommendations

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### Selecting and Applying Maintenance Best Practices and Recommendations

#### Topics

- ▶ Working with a PeopleSoft Update Image (UI)
- ▶ Update vs Upgrade
- ▶ What Environments Should Be Maintained
- ▶ How to Apply a PeopleSoft Release Patchset (PRS)
- ▶ Language Updates
- ▶ Guidelines for Applying Maintenance and Features
- ▶ Understanding Dependencies
- ▶ Understanding PeopleTools Releases and Patches
- ▶ Additional Information

# Topics



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# Working with a PeopleSoft Update Image (PI)

- Can be used for many things:
  - Selecting maintenance and enhancements for updates
  - New feature demos
  - Conference room prototypes
  - Recreating incidents on vanilla releases
- What you need to know:
  - There is no Cobol license.
  - Language data is kept in files and not available until applied.
  - Both maintenance and new enhancements are included.
  - They are cumulative, so the next image includes everything from the previous image.

# Working with a PeopleSoft Update Image (continued)

- Download new images when they are available.
- Not recommended to keep old images around.
- Follow the instructions in *Using the PeopleSoft VirtualBox Images* when downloading and installing an image:
  1. Go to the PeopleSoft Update Manager Home Page (Doc 1641843.2).
  2. Choose your application home page (HCM, FSCM, etc).
  3. Select the Installation Documentation section.
  4. Download *Using the PeopleSoft VirtualBox Images PT 8.54.05 or Higher* or updated version of the installation documentation.

# Working with a PeopleSoft Update Image (continued)

## What release am I on?

- Technically, every customer on release 9.2 is current.
- Every 9.2 customer has applied some variation of maintenance:
  - We expect every customer to have applied different maintenance.
  - Just because bugs from PI009 were applied, doesn't mean you're on PI009.
- Never say “we're on PI009,” instead say “our last get-current was on PI009 using image PI009.”



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# Update vs Upgrade

- Upgrade means moving from an older release to 9.2:
  - Use a certified Upgrade Source Image as the starting point (not every PI is an Upgrade Source Image) or you can use the source database delivered on OSDC.
  - The process is:
    - Upgrade to the latest certified upgrade release (for example, FSCM 9.2 through Update Image 11).
    - Do a 'get me current' to the latest PeopleSoft Update Image (PI).
    - Apply ongoing maintenance and features going forward.
  - Each product team delivers certified upgrade paths at different intervals.
  - Once on 9.2, there are no more upgrades.
  - For more information go to the PeopleSoft Upgrade Source Image Home Page (Doc ID 1552580.1) on My Oracle Support.

# Update vs Upgrade (continued)

- Updates are done once on application is PUM enabled.
  - Use a PI to search for and select maintenance and new features.
  - Maintenance should be performed regularly throughout the life of the product.
  - Many different maintenance strategies. How often should you get current?
    - Recommend that you do not go more than 2 years without getting current.
    - Stagger different products so get current is not done on the entire product line.
    - Products that are not used do not have to be maintained.
    - Delaying maintenance may affect your ability to select and apply updates and features.
  - Each product team delivers PIs at different times and intervals. Look at the PUM Home page for planned delivery schedules.

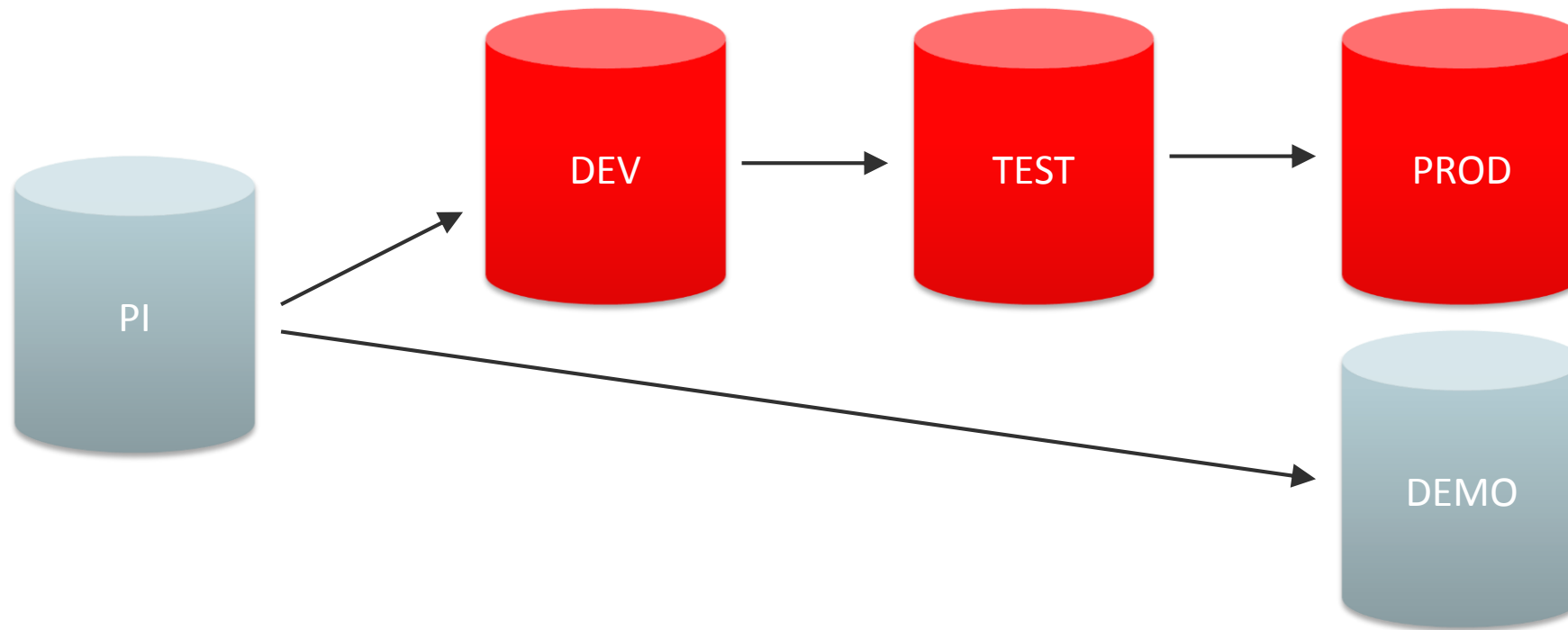
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# What Environments Should Be Maintained

Every customer should maintain several different PeopleSoft environments.



# What Environments Should Be Maintained (continued)

- To determine if a discovered bug is the result of customization or from vendor:
  - Use PI to see if the problem exists in the latest version of PeopleSoft with all maintenance applied. (May not be an option if the problem is related to the database or language.)
  - Use DEMO to see if enough maintenance has been applied to fix the problem. This can help narrow the problem to customization or incomplete maintenance.

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# How to Apply a PeopleSoft Release Patchset (PRP)

- To apply a PeopleSoft Release Patchset (PRP) you must follow the directions provided by Oracle Support.
- PRPs are typically applied by:
  - Applying the updates to the most current PI, not directly to your environment.
  - Using the PeopleSoft Update Manager application to find and select the update.
    - PUM will include any relevant dependencies.
  - Generating a change package definition that includes your changes.
- A Proof of Concept (POC) patch is considered a customization.



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# Language Updates

- Even though the PI application is always English, all language updates are delivered in the PI.
- All language data is loaded based on the language you selected in your target environment.
- If you run more than one system with different languages, you must have a PI for each different system.

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# Guidelines for Applying Maintenance and Features

- The best practice process flow for maintenance and new features:
  - Have all environments deployed and ready for maintenance.
  - Download and set up the latest Update Image.
  - Configuring EMF is an optional step that you can do to help distribute files.
  - Configure Change Assistant using the current PI as the source and DEV as the target
    - CA will synchronize the maintenance history in the PI.
  - Select maintenance using the PUM PIA application and create a change package definition.
  - Use CA initial pass to apply the update to DEV.
  - Compare, merge, and retrofit customizations in DEV.

# Guidelines for Applying Maintenance and Features (cont.)

- The best practice process flow for maintenance and new features:
  - Use the CA Upgrade Compare process to create a modified version of the change package in DEV which includes customizations.
  - Perform a test application of the new change package using DEV as the source and TEST as the target.
  - Test the changes in the TEST environment. For best results use PeopleSoft Test Framework as the automated testing tool.
  - Use the change package created for the TEST application pass to apply changes to your production environment.
  - Apply the initial change package that was originally used to update DEV, to the DEMO environment.

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# Understanding Dependencies

- Dependencies are calculated for each bug selected.
- Dependencies may include bugs from more current PIs.
- Every PI has only 1 version.
- Only a single version included in each PI, so dependencies may include bugs from more current PIs.
  - Setting an image number in the search criteria will return bugs based on the image number, but may include dependencies from more recent images.
  - Never mix and match or go backwards when applying maintenance and features. That is not supported.

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# Understanding PeopleTools Releases and Patches

- A PeopleSoft Update Image (PI) comes with multiple versions of PeopleTools:
  - The most current version of PeopleTools runs with the PIA application.
  - All supported versions of PeopleTools are delivered with each PI.
  - The version of PeopleTools delivered with each PI will be the latest patch.
- Always use the versions of PeopleTools delivered with the PI as the target PeopleTools version when applying maintenance and features.

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# Additional Resources

PeopleSoft Online Help - PeopleSoft PeopleTools 8.54

- Change Assistant and Update Manager

PeopleSoft Update Manager (PUM) Home Page (Doc ID 1641843.2)

Getting Starting with your PeopleSoft Upgrade training on Oracle Learning Library

Oracle University Training

- PeopleSoft Lifecycle Management Rel 8.53 (4 day course)
- PeopleSoft Update Manager Rel 8.54 (2 day course)
- PeopleSoft Lifecycle Mgmt & Update Manager Accelerated (5-days)

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