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Implementing Selective Adoption

- Selective Adoption – Goals and benefits of PeopleSoft's new delivery model.
- The Proactive Organization – How your organization must prepare to take advantage of the benefits of selective adoption.

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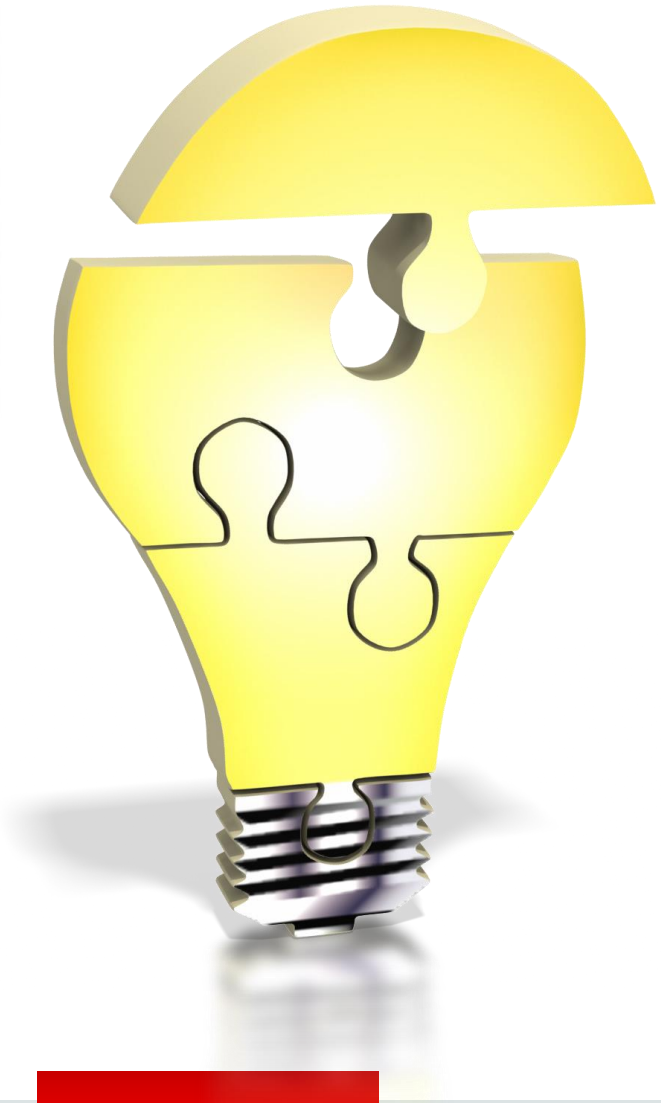
Topics



- Understanding Selective Adoption
- Building a Proactive Organization Plan
- Additional Resources

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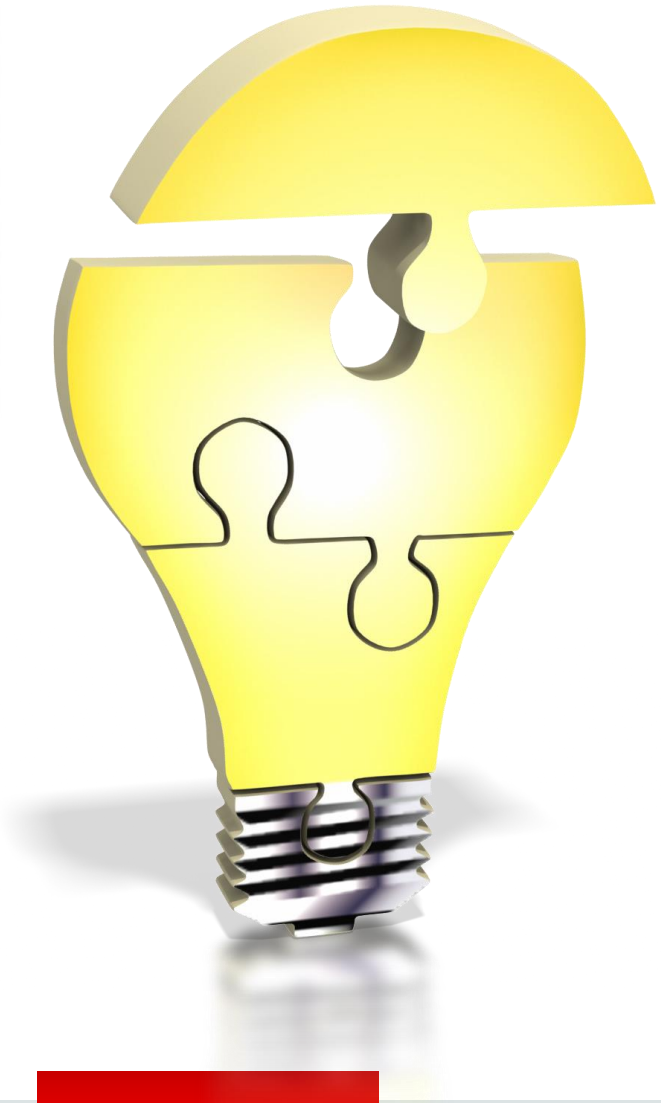
Topics



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Selective Adoption Goals

- Incrementally deliver new enhancements.
- Eliminate major upgrades.
- Take only what you want.
- Take changes when you want.
- Retain strategic customizations.

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PeopleSoft Delivery Model

Old: Bundles and Upgrades

- Frequent maintenance
- Take all maintenance
- Recommend staying current

- Infrequent enhancements
- Major upgrade every 3–4 years
- No incremental changes

New: Selective Adoption

- Frequent maintenance
- Take selective maintenance
- Determine stay current strategy

- Frequent enhancements
- No major upgrades
- Incremental changes 2–3 times/year

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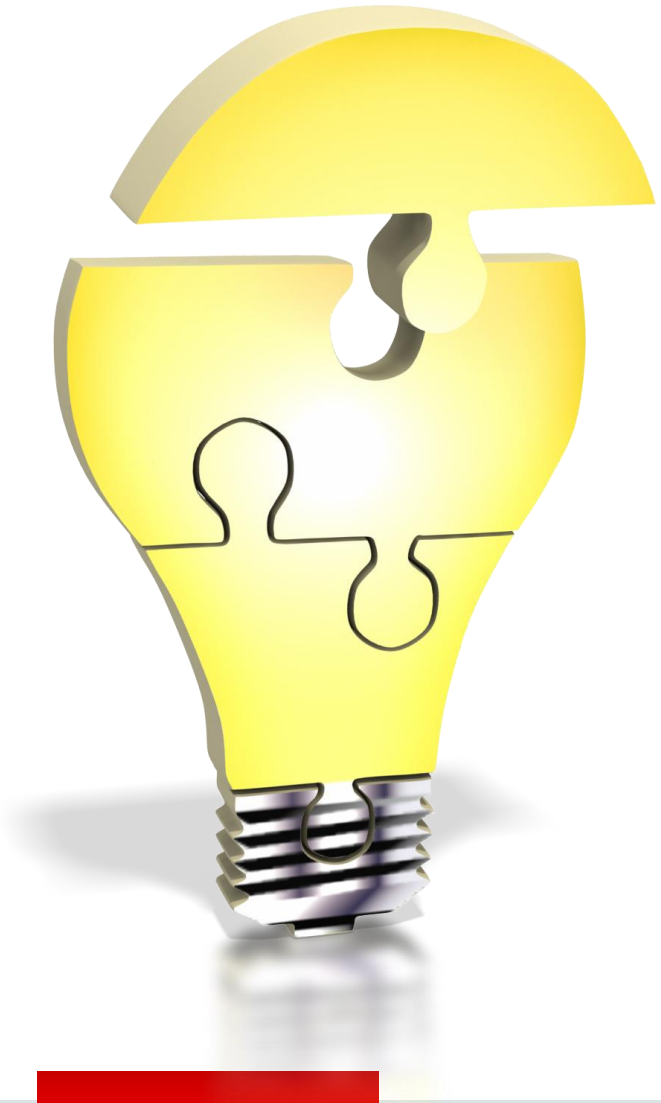

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Proactive Organization

- A proactive organization will create the internal business processes, practices, and relationships that optimize the benefits of the new delivery model, in every product phase:
  - Planning and analysis
  - System implementation
  - Rollout

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Your Proactive Organization Plan

- Change your mindset.
- Create an annual schedule.
- Stay on a current version of PeopleTools.
- Automate your testing.
- Roll out incremental change.

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Mindset Changes

Old:

- Business process drives software
- Customizations are readily available
- Maintenance is deferred
- Focus on optimizing transactions
- Business systems are static

New:

- Delivered process is basis
- Customization is disciplined
- Maintenance is frequent
- Focus on optimizing system
- Business systems are agile

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Mindset Change

- Work with everyone to help them understand and adopt change.
- Reinforce need for and value of change:
  - Project funding
  - Roles and responsibilities
  - Project/Product governance
- None of this is easy or automatic. There is a deep entrenchment of what has worked in the past.

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Plan Your Schedule

- Schedule should cover maintenance, new features, and customizations.
- Maintenance includes:
  - Bugs, legs/regs
  - Stay current
  - Opportunity value of having system ready for change
- Enhancements should be:
  - Evaluated
  - Rolled out incrementally

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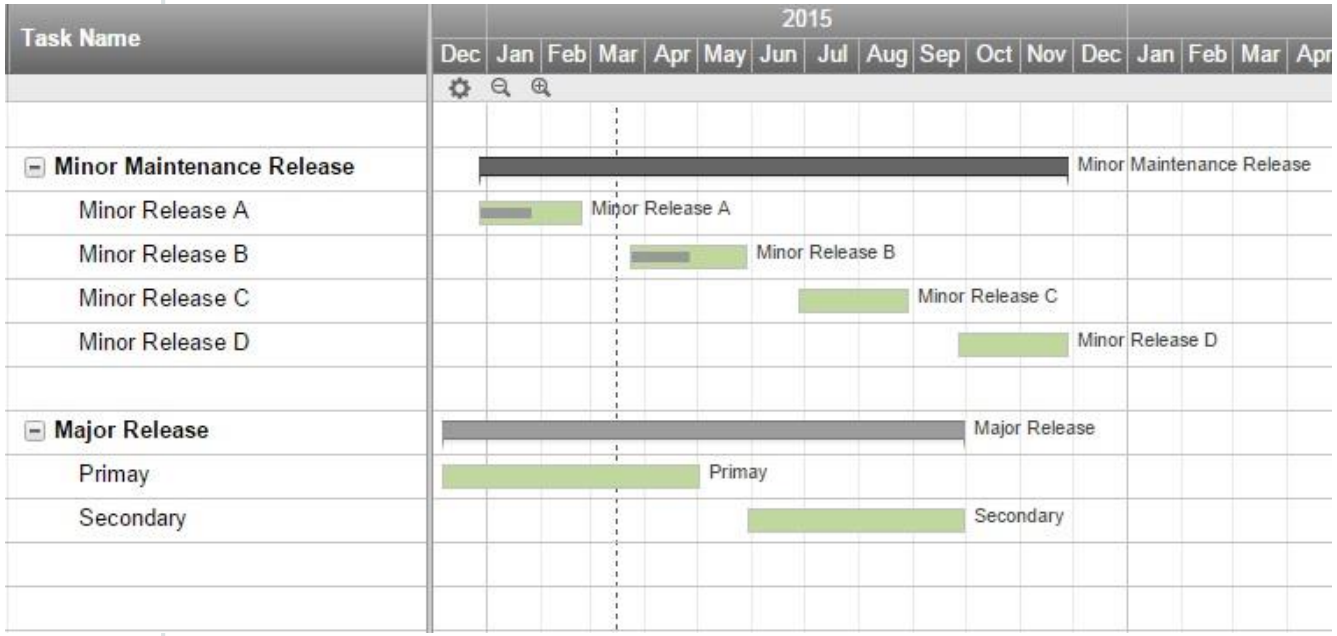
Plan Your Schedule

- Example Schedule:
  - Minor release 4 times a year
    - 1.5 to 2 month projects
    - Regulations and bug fixes
    - Minor user requests
    - Feb, May, Aug, Nov
  - Major releases 2 times a year
    - 5-month major project
    - New enhancements
    - Get current plans
    - Apr, Sept



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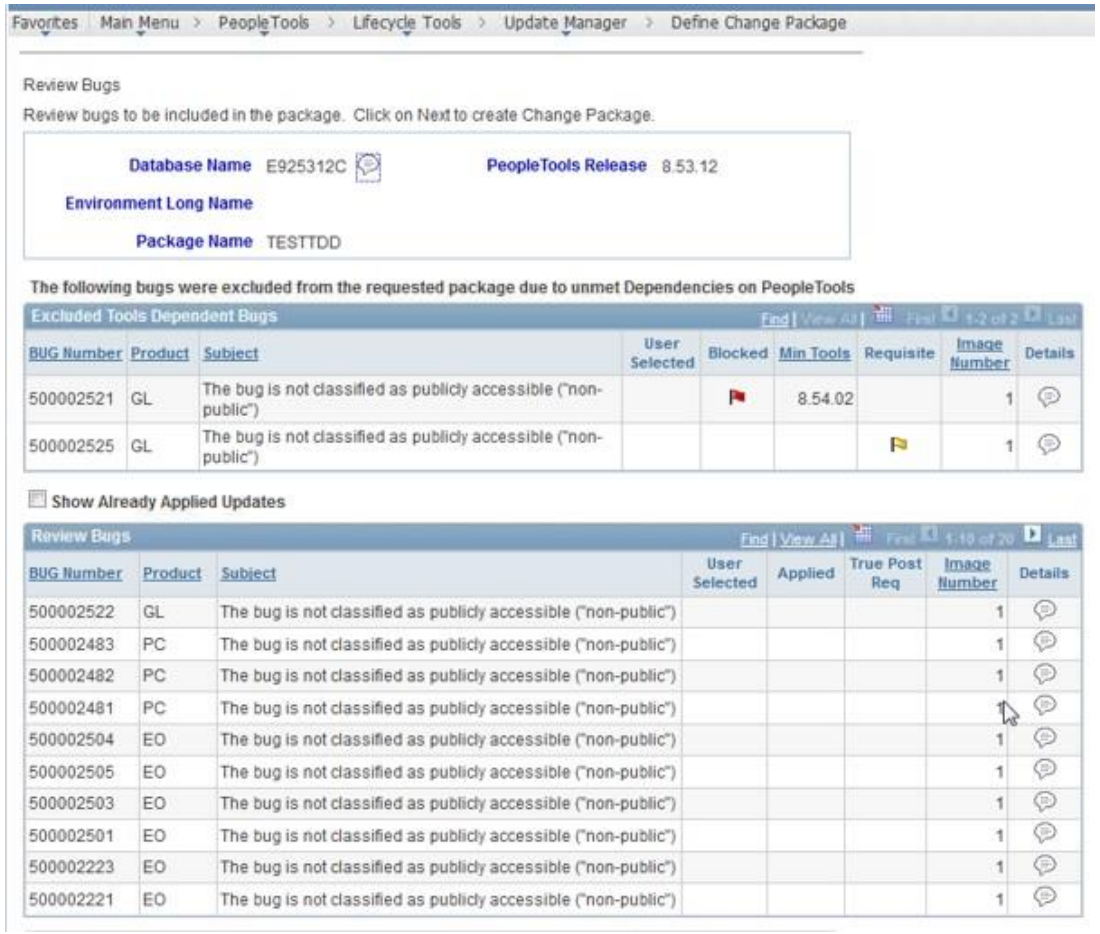
PeopleTools Maintenance Policy

- PeopleTools updates are the same as they have always been.
- PeopleTools license says:
  - Full support for 12 months after next release.
  - Limited support for additional 12 months.
- May be required to be on a supported version in order to apply maintenance.



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PeopleTools Maintenance Policy

Product(s)	Feature	Version	Introduced In Image/Bundle	Minimum PeopleTools Version	Bug Id	Documentation	Video Feature Overview
General HCM Enhancements	Updates to AWE add flexibility to timeout options and restructure the comments stored by AWE. The comment restructuring allows for better reporting and extracting of the comments because they are no longer stored in a single string.	9.2.009	HCM 9.2 Update Image 9 (9.2.009)	8.53.10	19470151		
	The Mobile Approvals feature provides a way for approvers to take action on retirement and termination approvals using a smart phone, a tablet, or the desktop version of the client through the use of the PeopleSoft Fluid User Interface.	9.2.009	HCM 9.2 Update Image 9 (9.2.009)	8.54	18141234		
	The Mobile Approvals feature provides a way for approvers to take action on ad hoc salary changes pending their approval using a smart phone, a tablet, or the desktop version of the client through the use of the PeopleSoft Fluid User Interface.	9.2.009	HCM 9.2 Update Image 9 (9.2.009)	8.54	18140974		
	The Mobile Approvals feature provides a way for approvers to take action on approvals for promotions, reporting changes, and transfers using a smart phone, a tablet, or the desktop version of the client through the use of the PeopleSoft Fluid User Interface.	9.2.009	HCM 9.2 Update Image 9 (9.2.009)	8.54	18140573		
	The PeopleSoft application enables you to use the Guided Self Service feature to configure and perform multiple manager self service transactions in a single process. You set up these self service transactions to display contextual information and questions that help guide the manager through the process of submitting employee requests, including promotions, transfers, reporting changes, and salary changes.	9.2.009	HCM 9.2 Update Image 9 (9.2.009)	8.54	18044034		

Minimum PeopleTools version can be found on the Cumulative Feature Overview and in Update Image Contents List spreadsheet available for each Update Image

Image Numb	Severi	Product	Product Component	Bug ID	Minimum Too	Bug Type
9.2.011	1	PeopleSoft Enterprise HRMS Common Application Objects	MAP Mobile Approvals	20131222	8.54.00	Bug
9.2.011	1	PeopleSoft Enterprise HRMS Common Application Objects	MAP Mobile Approvals	20157600	8.54.00	Bug

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Test Automation Strategy

- Testing is the largest part of any project.
- Start your regression tests by:
  - Automating testing of mature products, not new development.
  - Having functional users design tests and technical users build and run tests.
  - Implementing a test documentation policy, which is key.
- Build repeatable portable tests:
  - Migrate tests from environments.
  - Page prompting allows for direct page access (navigation free).
  - Scroll prompting to identify by key not index.
  - Cross reference reports.

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Rolling Out Incremental Change

- New analyst role:
  - Understand what is coming and what is there:
    - Planned Features and Enhancements Info Center
    - Cumulative Feature Overview Tool
  - Work with IT and LOB owners to keep them informed about what is available and what the impacts are.
  - Develop short-term and long-term adoption plans.
  - Identify enhancement priorities.

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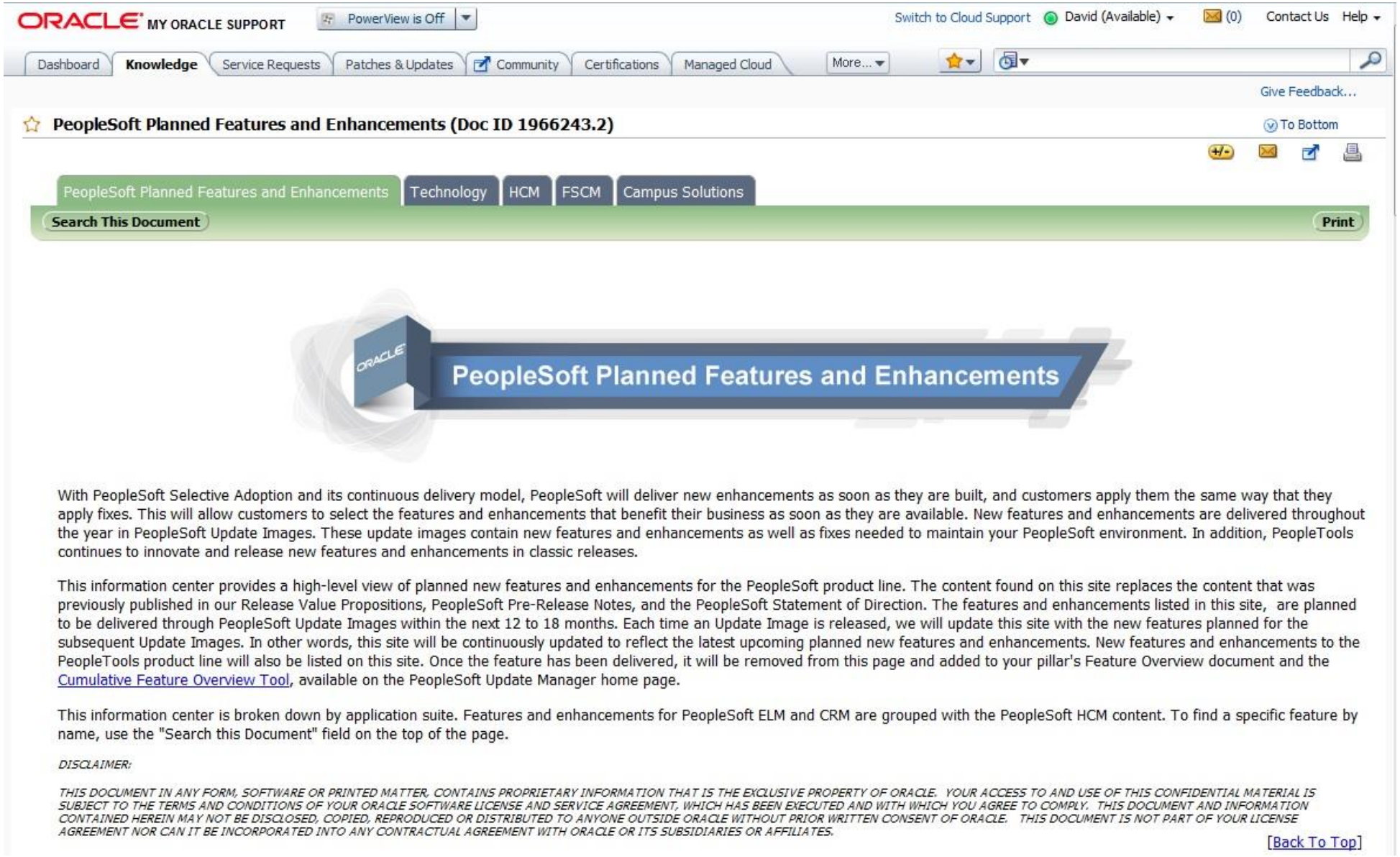

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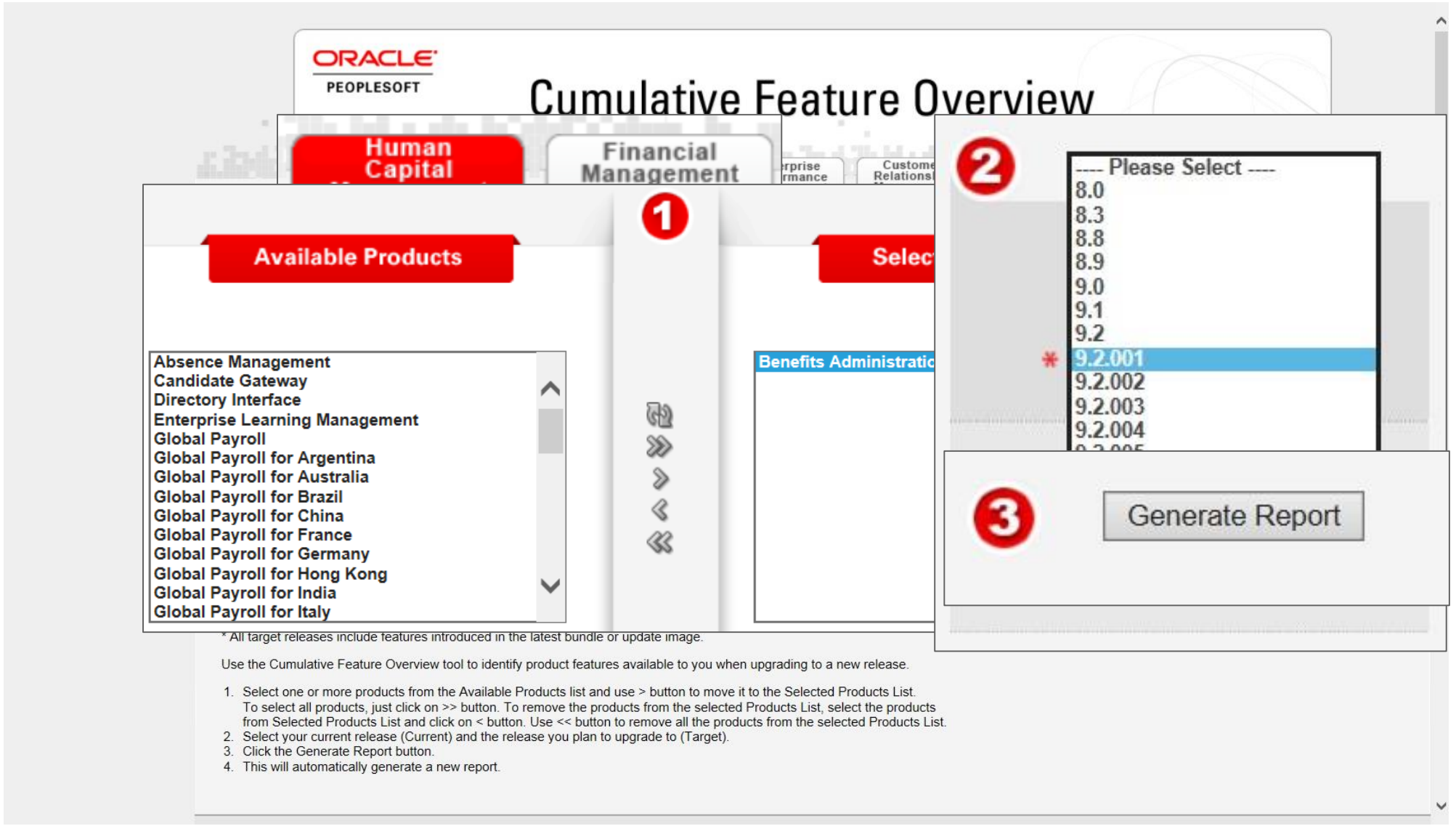

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Summary

- It is the proactive organization that will gain the most from selective adoption.
- Take the time to respond to the new way PeopleSoft delivers maintenance and enhancements.
- Look at your internal processes and evaluate them based on the new delivery model.
- Develop new working relationships between IT and LOB.

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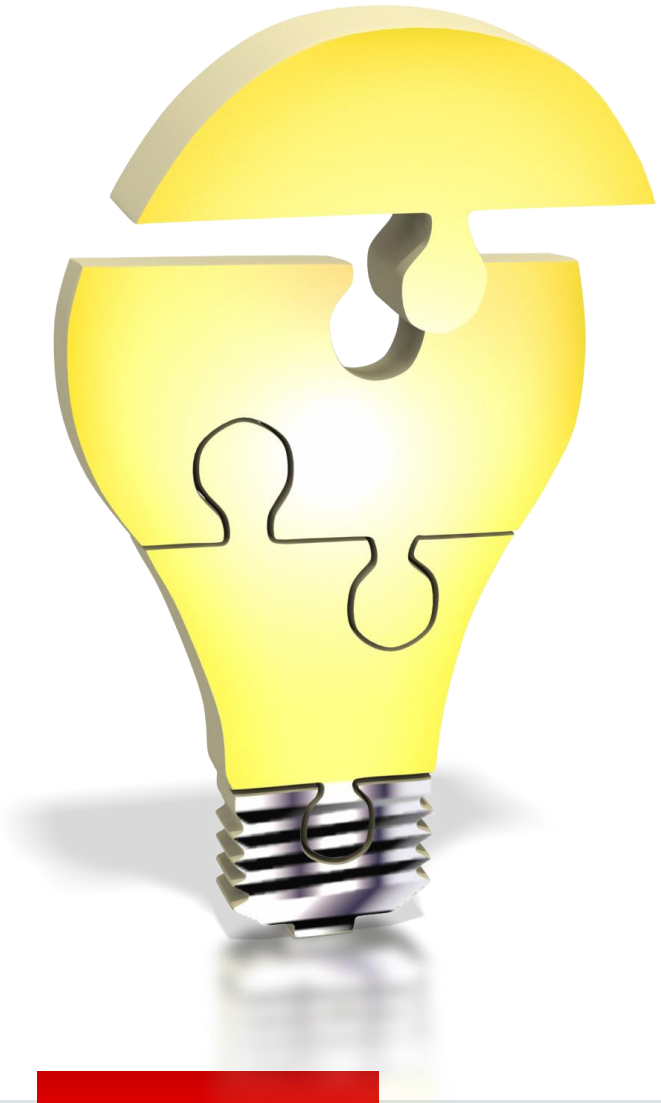

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Additional Resources

- Whitepaper: *How to Gain Value From Selective Adoption*
  - My Oracle Support Doc ID 1934210.1
- PeopleSoft Online Help - PeopleSoft PeopleTools 8.54
  - Change Assistant and Update Manager
- PeopleSoft Update Manager (PUM) Home Page
  - My Oracle Support Doc ID Doc ID 1641843.2

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Additional Resources, Continued

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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