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PeopleSoft Spotlight Series

Implementing a Selective Adoption Strategy

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Implementing a Selective
Adoption Strategy



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.



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.

Topics



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

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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.

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

Topics



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

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

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.

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

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.

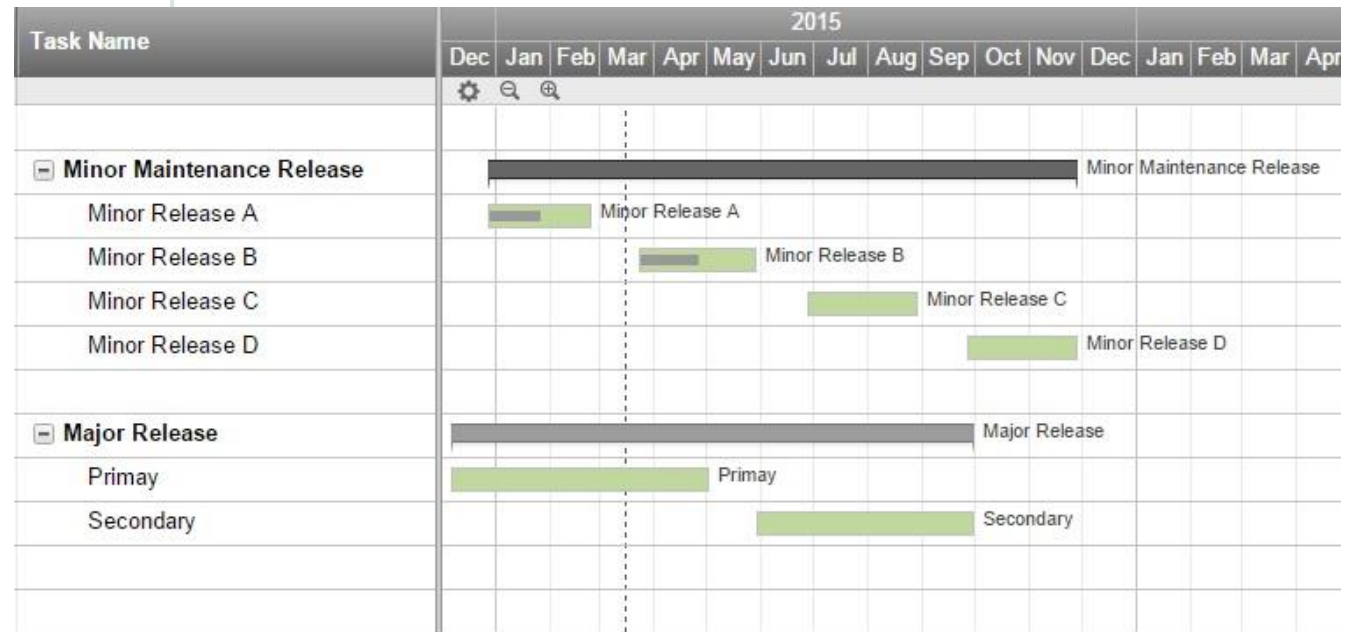


Plan Your Schedule

- 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

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



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.

Review Bugs

Review bugs to be included in the package. Click on Next to create Change Package.

Database Name E925312C PeopleTools Release 8.53.12

Environment Long Name

Package Name TESTDD









The following bugs were excluded from the requested package due to unmet Dependencies on PeopleTools

BUG Number	Product	Subject	User Selected	Blocked	Min Tools	Requisite	Image Number	Details
500002521	GL	The bug is not classified as publicly accessible ("non-public")			8.54.02		1	
500002525	GL	The bug is not classified as publicly accessible ("non-public")					1	

Show Already Applied Updates

BUG Number	Product	Subject	User Selected	Applied	True Post Req	Image Number	Details
500002522	GL	The bug is not classified as publicly accessible ("non-public")				1	
500002483	PC	The bug is not classified as publicly accessible ("non-public")				1	
500002482	PC	The bug is not classified as publicly accessible ("non-public")				1	
500002481	PC	The bug is not classified as publicly accessible ("non-public")				1	
500002504	EO	The bug is not classified as publicly accessible ("non-public")				1	
500002505	EO	The bug is not classified as publicly accessible ("non-public")				1	
500002503	EO	The bug is not classified as publicly accessible ("non-public")				1	
500002501	EO	The bug is not classified as publicly accessible ("non-public")				1	
500002223	EO	The bug is not classified as publicly accessible ("non-public")				1	
500002221	EO	The bug is not classified as publicly accessible ("non-public")				1	

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 Num	Sever	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

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.

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.



☆ PeopleSoft Planned Features and Enhancements (Doc ID 1966243.2)



PeopleSoft Planned Features and Enhancements

Technology

HCM

FSCM

Campus Solutions

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Print



With PeopleSoft Selective Adoption and its continuous delivery model, PeopleSoft will deliver new enhancements as soon as they are built, and customers apply them the same way that they apply fixes. This will allow customers to select the features and enhancements that benefit their business as soon as they are available. New features and enhancements are delivered throughout the year in PeopleSoft Update Images. These update images contain new features and enhancements as well as fixes needed to maintain your PeopleSoft environment. In addition, PeopleTools continues to innovate and release new features and enhancements in classic releases.

This information center provides a high-level view of planned new features and enhancements for the PeopleSoft product line. The content found on this site replaces the content that was previously published in our Release Value Propositions, PeopleSoft Pre-Release Notes, and the PeopleSoft Statement of Direction. The features and enhancements listed in this site, are planned to be delivered through PeopleSoft Update Images within the next 12 to 18 months. Each time an Update Image is released, we will update this site with the new features planned for the subsequent Update Images. In other words, this site will be continuously updated to reflect the latest upcoming planned new features and enhancements. New features and enhancements to the PeopleTools product line will also be listed on this site. Once the feature has been delivered, it will be removed from this page and added to your pillar's Feature Overview document and the [Cumulative Feature Overview Tool](#), available on the PeopleSoft Update Manager home page.

This information center is broken down by application suite. Features and enhancements for PeopleSoft ELM and CRM are grouped with the PeopleSoft HCM content. To find a specific feature by name, use the "Search this Document" field on the top of the page.

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Cumulative Feature Overview

Human
Capital

Financial
Management

Enterprise
Performance

Customer
Relationships

Available Products

- Absence Management
- Candidate Gateway
- Directory Interface
- Enterprise Learning Management
- Global Payroll
- Global Payroll for Argentina
- Global Payroll for Australia
- Global Payroll for Brazil
- Global Payroll for China
- Global Payroll for France
- Global Payroll for Germany
- Global Payroll for Hong Kong
- Global Payroll for India
- Global Payroll for Italy

1

Select

Benefits Administration

2

--- Please Select ---

- 8.0
- 8.3
- 8.8
- 8.9
- 9.0
- 9.1
- 9.2
- * 9.2.001
- 9.2.002
- 9.2.003
- 9.2.004
- 9.2.005

3

Generate Report

* All target releases include features introduced in the latest bundle or update image.

Use the Cumulative Feature Overview tool to identify product features available to you when upgrading to a new release.

1. Select one or more products from the Available Products list and use > button to move it to the Selected Products List.
To select all products, just click on >> button. To remove the products from the selected Products List, select the products from Selected Products List and click on < button. Use << button to remove all the products from the selected Products List.
2. Select your current release (Current) and the release you plan to upgrade to (Target).
3. Click the Generate Report button.
4. This will automatically generate a new report.

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.

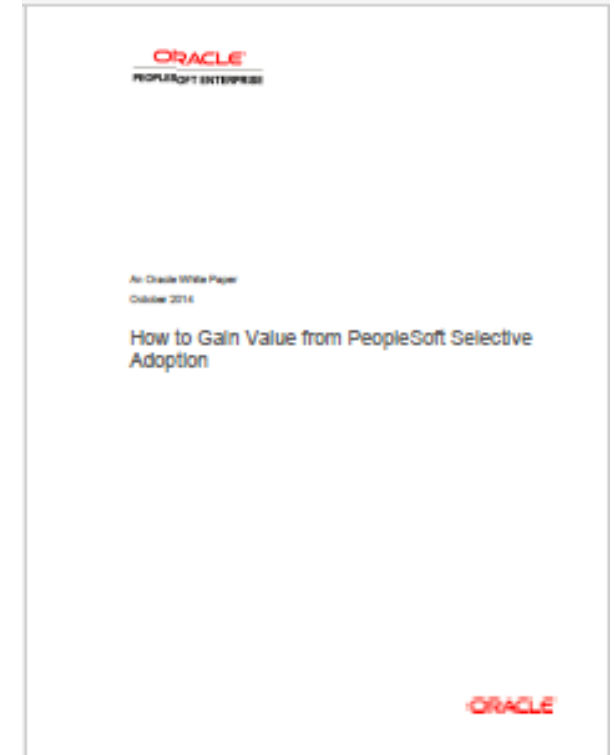
Topics



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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



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)

Safe Harbor Statement

The preceding is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

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