

PUM in the Real World

Session #34392

March 17, 2015

Your Presenter

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Agenda/Contents

- Introduction
- General PUM Overview
- When is PUM needed
- Server Requirements / Recommendations
- Desktop Requirements / Recommendations
- PUM / PI Image Overview
- Walk-Through
- Wrap Up / Things I Wish I'd Known

City of Albuquerque & Oracle

- PeopleSoft HRMS
9.2 / PT 8.53
- PeopleSoft Financials
9.2 / PT 8.53
- Hyperion

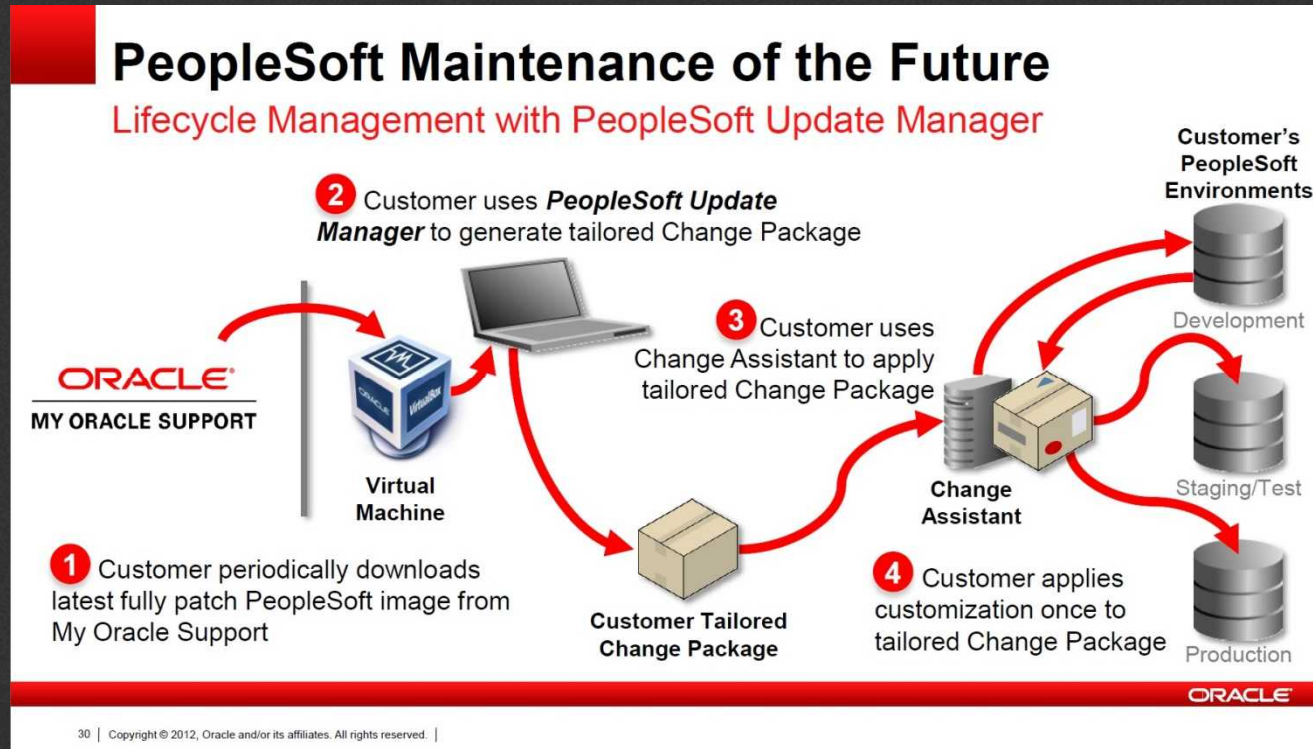


Sandia National Laboratories & Oracle

- PeopleSoft
- HCM
- Currently Upgrading

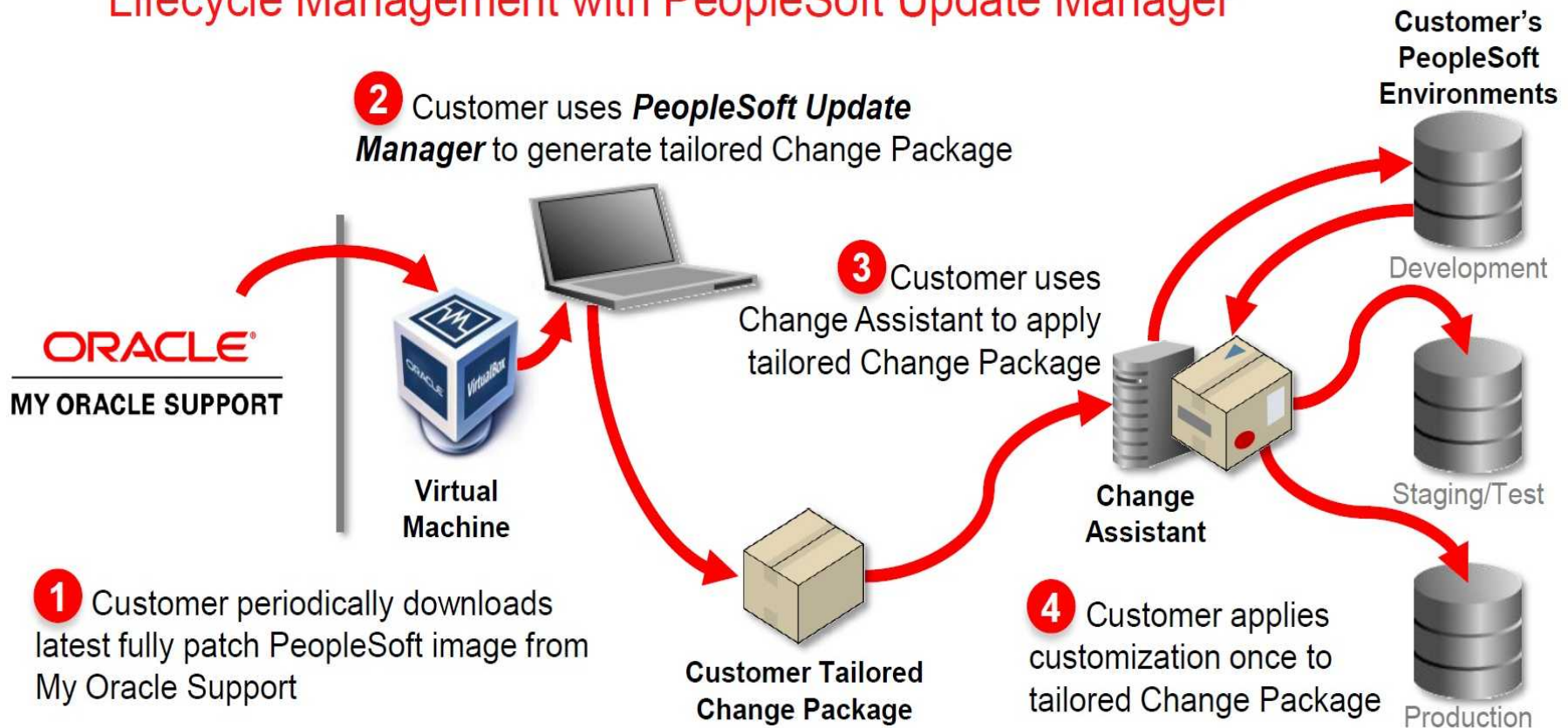


PUM Overview



PeopleSoft Maintenance of the Future

Lifecycle Management with PeopleSoft Update Manager

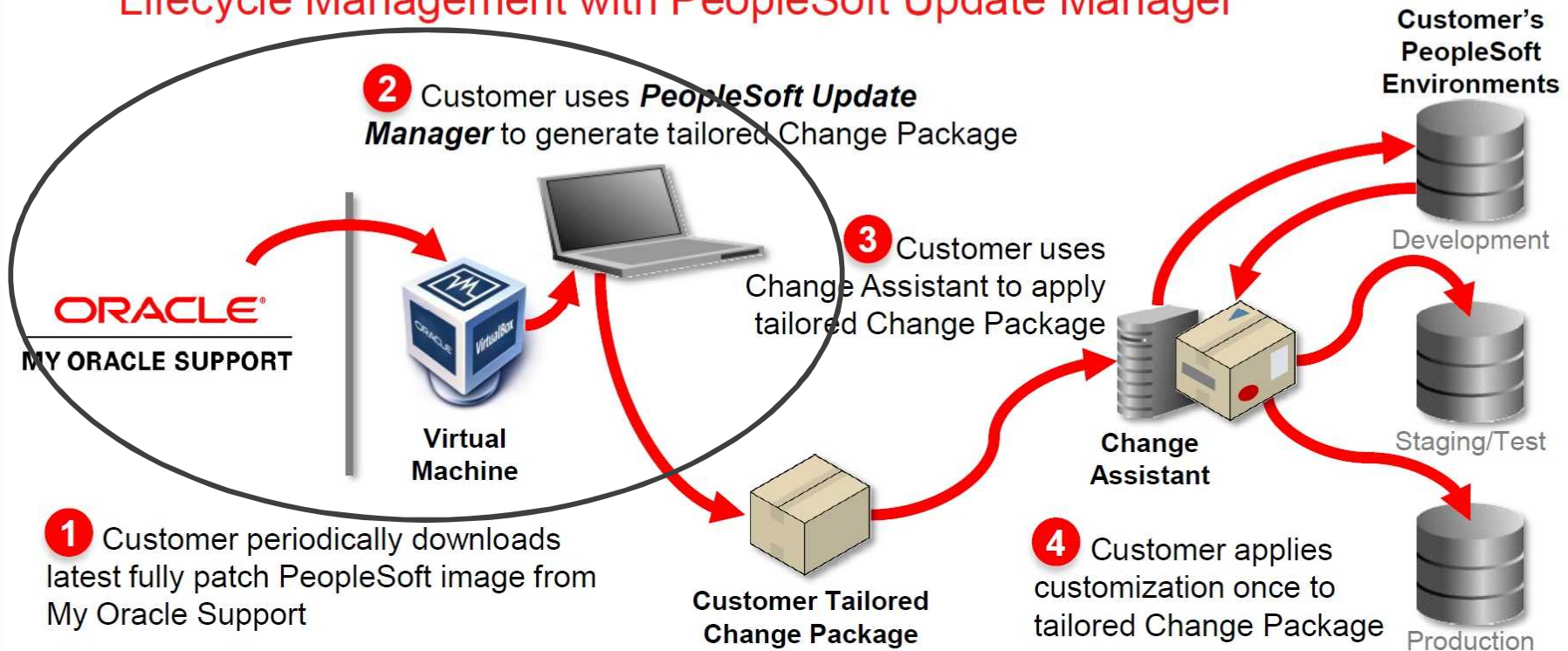


When is PUM Needed?

- PUM (PI) images can be used anytime as a DMO environment
- Upgrades – A PUM Image will be used for your Upgrade Source Environment
 - And...you'll use PUM to apply the required pre-upgrade fixes to your Upgrade Source Environment
- After your upgrade, PUM will be used to bring your environment current
- Ongoing maintenance
- Emergency bug application

PeopleSoft Maintenance of the Future

Lifecycle Management with PeopleSoft Update Manager



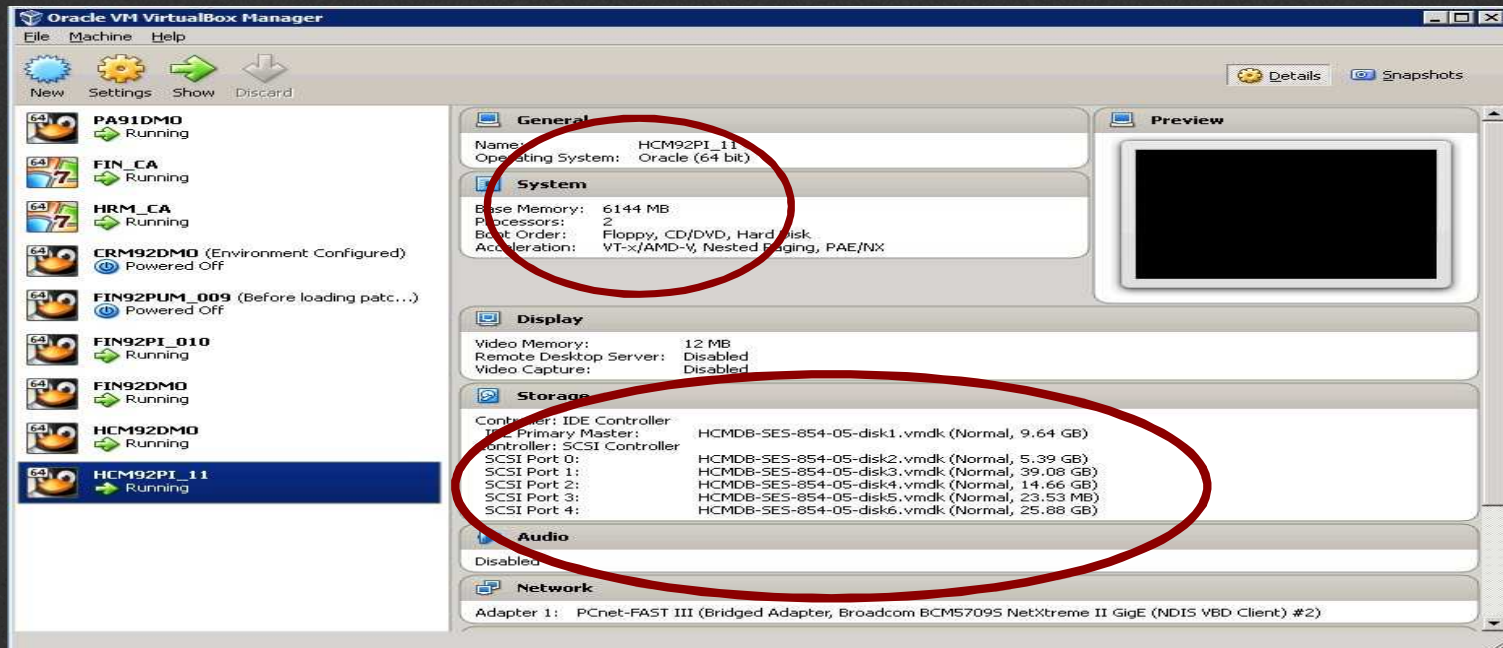
ORACLE

PUM Server

- Do you need a separate server?
 - YES...YES...YES!
- Server specs
 - Plenty of processing power
 - Plenty of RAM
 - LOTS of disk space
- Requirements will vary with the number of VM's you need

RAM / CPU

- Each VM can take as much as 6Gb of RAM
 - However, when running they generally take much less



RAM / CPU

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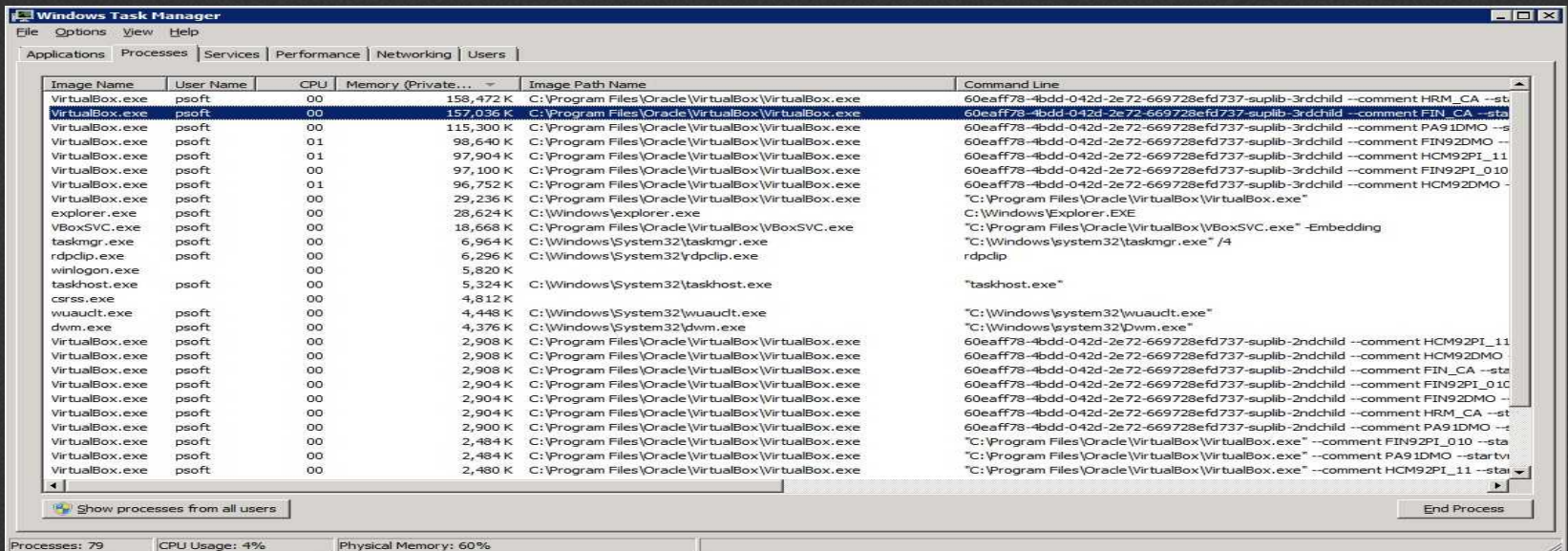


Image Name	User Name	CPU	Memory (Private...)	Image Path Name	Command Line
VirtualBox.exe	pssoft	00	158,472 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment HRM_CA --sta
VirtualBox.exe	pssoft	00	157,088 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment HRM_CA --sta
VirtualBox.exe	pssoft	00	115,300 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment PA91DMO --s
VirtualBox.exe	pssoft	01	98,640 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment FIN92DMO --
VirtualBox.exe	pssoft	01	97,904 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment HCM92PI_11
VirtualBox.exe	pssoft	00	97,100 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment HCM92PI_010
VirtualBox.exe	pssoft	01	96,752 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-3rdchild --comment HCM92DMO --
VirtualBox.exe	pssoft	00	29,236 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	"C:\Program Files\Oracle\VirtualBox\VirtualBox.exe"
explorer.exe	pssoft	00	28,624 K	C:\Windows\explorer.exe	C:\Windows\Explorer.EXE
VBoxSVC.exe	pssoft	00	18,668 K	C:\Program Files\Oracle\VirtualBox\VBoxSVC.exe	"C:\Program Files\Oracle\VirtualBox\VBoxSVC.exe" -Embedding
taskmgr.exe	pssoft	00	6,964 K	C:\Windows\System32\taskmgr.exe	"C:\Windows\system32\taskmgr.exe" /4
rdpclip.exe	pssoft	00	6,296 K	C:\Windows\System32\rdpclip.exe	rdpclip
winlogon.exe	pssoft	00	5,820 K		
taskhost.exe	pssoft	00	5,324 K	C:\Windows\System32\taskhost.exe	"taskhost.exe"
csrss.exe	pssoft	00	4,812 K		
wuauclt.exe	pssoft	00	4,448 K	C:\Windows\System32\wuauclt.exe	"C:\Windows\system32\wuauclt.exe"
dwm.exe	pssoft	00	4,376 K	C:\Windows\System32\dwm.exe	"C:\Windows\system32\dwm.exe"
VirtualBox.exe	pssoft	00	2,908 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-2ndchild --comment HCM92PI_11
VirtualBox.exe	pssoft	00	2,908 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-2ndchild --comment HCM92DMO
VirtualBox.exe	pssoft	00	2,908 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-2ndchild --comment FIN92PI_010
VirtualBox.exe	pssoft	00	2,904 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-2ndchild --comment HCM92DMO --
VirtualBox.exe	pssoft	00	2,904 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-2ndchild --comment HRM_CA --st
VirtualBox.exe	pssoft	00	2,904 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	60eaff78-4bdd-042d-2e72-669728efd737-suplib-2ndchild --comment PA91DMO --s
VirtualBox.exe	pssoft	00	2,900 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	"C:\Program Files\Oracle\VirtualBox\VirtualBox.exe" --comment FIN92PI_010 --sta
VirtualBox.exe	pssoft	00	2,484 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	"C:\Program Files\Oracle\VirtualBox\VirtualBox.exe" --comment PA91DMO --starv
VirtualBox.exe	pssoft	00	2,480 K	C:\Program Files\Oracle\VirtualBox\VirtualBox.exe	"C:\Program Files\Oracle\VirtualBox\VirtualBox.exe" --comment HCM92PI_11 --sta

Processes: 79 | CPU Usage: 4% | Physical Memory: 60%

Space Planning / PI Images

- Plan for LOTS of drive space
 - Each image is ~ 35Gb when downloaded (multiple zips)
 - A delivered batch script merges the zips together to create a template file, also ~35Gb
 - The template is then expanded into the VM, taking up >70Gb, often 80Gb.
 - So, creating a single VM uses >140Gb
 - After the VM is created, the zips can (optionally) be deleted

Example of Upgrade Space

- DMO – 140Gb @ Install
 - 80 – 120Gb Ongoing
- UPG – 140Gb @ Install
 - 80 - 100Gb Ongoing
- PUM – 140Gb @ Install
 - 80 – 100GB Ongoing
- Totals up to roughly **340Gb** per pillar (HCM, FIN, Etc)

Ongoing Environment Needs

- DMO environment of current production release
- Future production release
- Additional image for tax patching, if that version won't be your target production release (depending on timing)

Hardware Conclusion

- Implement a server with better specifications than you think you'll need.
- Remember that you'll be using your PUM server for routine maintenance, not just for your upgrade.
- Consider creating Change Assistant VM's within your VirtualBox environment to improve upgrade performance and stability.

Desktop Requirements

- All PUM patching runs through Change Assistant (CA)
- This includes the actual package building
- Ensure you have plenty of Memory/CPU
- Ensure you have a FAST/STABLE network connection
- VirtualBox “guest additions” if using VirtualBox VM’s for CA

Desktop Requirements

- PeopleTools versions for your Current / Target environments
- Peopletools 8.54
- Change Assistant 8.54
- Oracle Client(s)

Desktop Recommendation

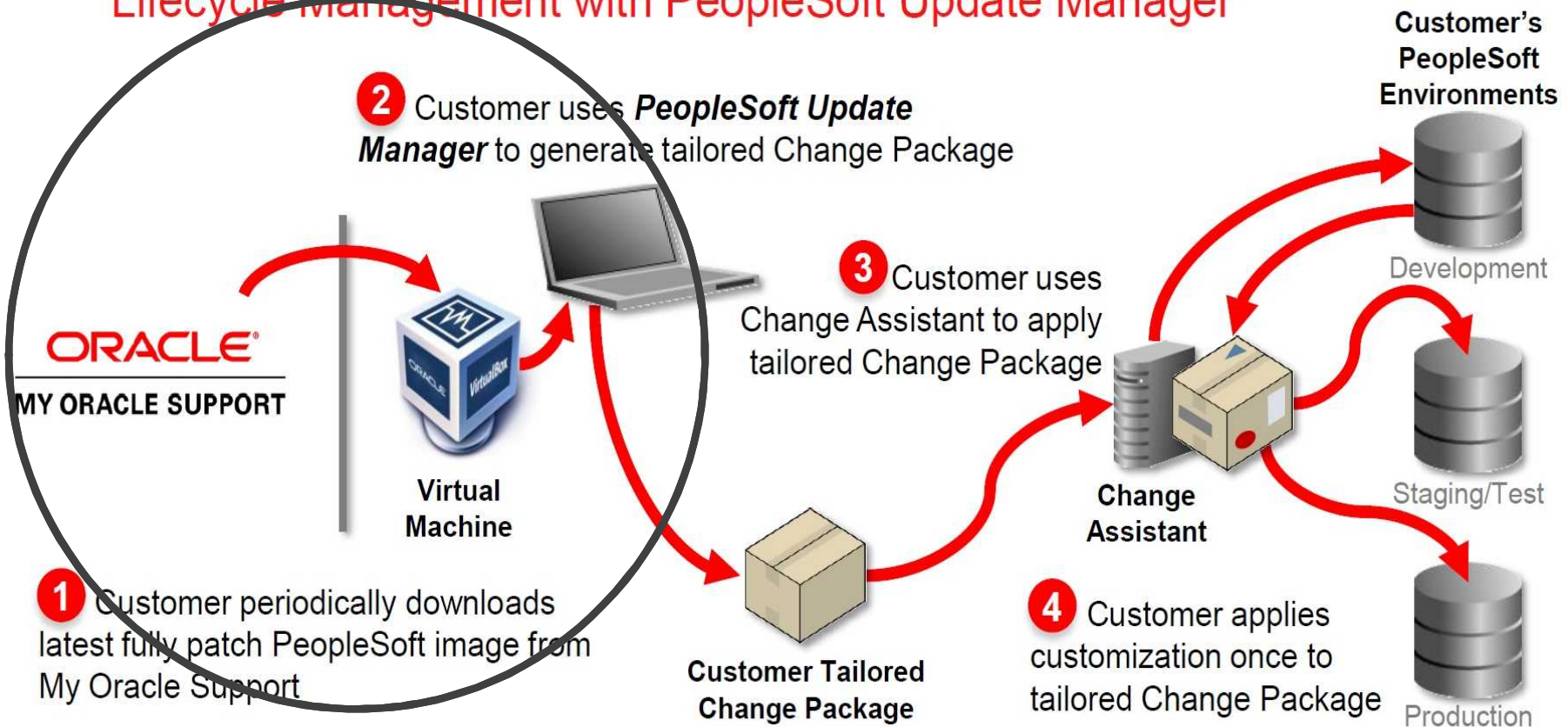
- Consider using a VM for your CA desktop machine
- Allows a connection from the backbone (if your network folks will allow it)
- Generally more stable
- No worries about someone undocking or rebooting the machine
- PI images > .09 are delivered with PT8.54
 - Therefore you'll need to use CA 8.54, but also have PT 8.53 client tools installed, depending on your environment

PUM Packages

Selecting criteria for your PUM package

PeopleSoft Maintenance of the Future

Lifecycle Management with PeopleSoft Update Manager



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Obtaining PUM (PI) Images

ORACLE MY ORACLE SUPPORT PowerView is On [My Core Products] Product Line: Internal ... Frank (Available) (0) Contact Us Help

Dashboards Knowledge Service Requests Patches & Updates Community Certifications Systems Collector More...

Document Display Search: pum homepage

Learning About PeopleSoft Update Manager PeopleSoft Update Image Home Pages Install and Upgrade Known Issues Best Practices Troubleshooting

Search This Document Print

Learning About PeopleSoft Update Manager

Welcome

What's new with PUM?
What is PeopleSoft Update Manager?
Types of Patches
Hardware and Software Requirements
Benefits
Using PeopleSoft Update Manager
Training and Resources

PeopleSoft Update Manager Home Page

Welcome to the PeopleSoft Update Manager Home Page. This is the central location for all things related to PeopleSoft Update Manager (PUM) and PeopleSoft Update Images (PIs). Here you can find information about selective adoption, update image home pages, troubleshooting links, best practices, and more.

This list outlines some of the information in this home page and where you can find it:

- Just getting started? Use the links on the left to learn all about PeopleSoft Update Manager.
- Looking for your application's image home page? Use the PeopleSoft Update Manager Image Home Pages tab.
- Want to know about the Known Issues for your current image? Use the Known Issues tab.
- Installing or upgrading to PeopleSoft 9.2? See the Install and Upgrade tab.
- Having problems with your PeopleSoft Update Image? See the Troubleshooting tab for answers.

Watch the [PeopleSoft Update Manager Home Page video](#) for tips on navigating through this page.

PeopleSoft Update Manager VFOs

Watch these brief Video Feature Overviews for a high-level look at PeopleSoft Update Manager.

- [PeopleSoft Update Manager VFO](#)
- [The PeopleSoft Delivery Model featuring Paco Aubrejuan](#)
- [PeopleSoft 9.2 Delivery Model](#)

Obtaining PUM (PI) Images



The screenshot displays the PeopleSoft Update Manager Home Page. At the top, a search bar contains the text "Search: pum homepage". Below this, a navigation bar includes links for "Learning About PeopleSoft Update Manager", "PeopleSoft Update Image Home Pages", "Install and Upgrade", "Known Issues", "Best Practices", and "Troubleshooting". A sidebar on the left, titled "Learning About PeopleSoft Update Manager", lists various topics such as "What's new with PUM?", "What is PeopleSoft Update Manager?", "Types of Patches", "Hardware and Software Requirements", "Benefits", "Using PeopleSoft Update Manager", and "Training and Resources". A dropdown menu is open under the "PeopleSoft Update Image Home Pages" link, showing a list of links: "PeopleSoft Update Image Home Pages", "HCM Update Image Home Page", "FSCM Update Image Home Page", "ELM Update Image Home Page", and "CRM Update Image Home Page". The main content area features a large green banner with the text "PeopleSoft Update Manager Home Page". Below the banner, a welcome message reads: "Welcome to the PeopleSoft Update Manager Home Page. This is the central location for all things related to PeopleSoft Update Manager (PUM) and PeopleSoft Update Images (PIs). Here you can find information about selecting the correct update image home pages, troubleshooting links, best practices, and more."

Search: pum homepage

Learning About PeopleSoft Update Manager

Search This Document

Learning About PeopleSoft Update Manager

Welcome

- What's new with PUM?
- What is PeopleSoft Update Manager?
- Types of Patches
- Hardware and Software Requirements
- Benefits
- Using PeopleSoft Update Manager
- Training and Resources

PeopleSoft Update Image Home Pages

- PeopleSoft Update Image Home Pages
- HCM Update Image Home Page
- FSCM Update Image Home Page
- ELM Update Image Home Page
- CRM Update Image Home Page

Install and Upgrade

Known Issues

Best Practices

Troubleshooting

PeopleSoft Update Manager Home Page

Welcome to the PeopleSoft Update Manager Home Page. This is the central location for all things related to PeopleSoft Update Manager (PUM) and PeopleSoft Update Images (PIs). Here you can find information about selecting the correct update image home pages, troubleshooting links, best practices, and more.

HCM Update Image Link

Follow the link in the following table to download the image from My Oracle Support. Please note that all PeopleSoft Update Images are cumulative, so once a new PeopleSoft Update Image is posted, the previous image will no longer be available.

Note. There are some known issues, errors, and warnings with this PeopleSoft Update Image. See the Known Issues tab for more information.

PeopleSoft HCM Update Image	Patchset Number	PUM Update Image Contents List	Date Posted
PeopleSoft Update Image HCM 9.2.011	20186928	PeopleSoft HCM 9.2.011 Update Image Contents List	January 16, 2015
PeopleSoft Update Image HCM 9.2.010	Superseded by HCM 9.2.011	Superseded by HCM 9.2.011	December 4, 2014

HCM Update Image Schedule

The following schedule is provided to help you plan for your maintenance needs. The dates here are informational and for planning purposes only. They do not represent a commitment to deliver and are subject to change.

PeopleSoft Update Image	Date
PeopleSoft HCM 9.2.012	April 10, 2015
PeopleSoft HCM 9.2.013	July 17, 2015
PeopleSoft HCM 9.2.014	October 9, 2015
PeopleSoft HCM 9.2.015	December 4, 2015

Software Version Manifest Information

Installation Documentation

Additional Documentation

Legislative, Regulatory and Tax updates

FSCM Update Image Link

Follow the link in the following table to download the image from My Oracle Support. Please note that all PeopleSoft Update Images are cumulative, so once a new PeopleSoft Update Image is posted, the previous image will no longer be available. See the FSCM Update Image Schedule for dates of upcoming images.

Note. There are some known issues, errors, and warnings with this PeopleSoft Update Image. See the Known Issues tab for more information.

PeopleSoft FSCM Update Image	Patchset Number	PUM Update Image Contents List	Date Posted
PeopleSoft Update Image FSCM 9.2.010	19819665	FSCM 9.2.010 Update Image Contents List	December 19, 2014
PeopleSoft Update Image FSCM 9.2.009	Superseded by FSCM 9.2.010	Superseded by FSCM 9.2.010	October 6, 2014

FSCM Update Image Schedule

The following schedule is provided to help you plan for your maintenance needs. These dates are informational and for planning purposes only. They do not represent a commitment to deliver and are subject to change.

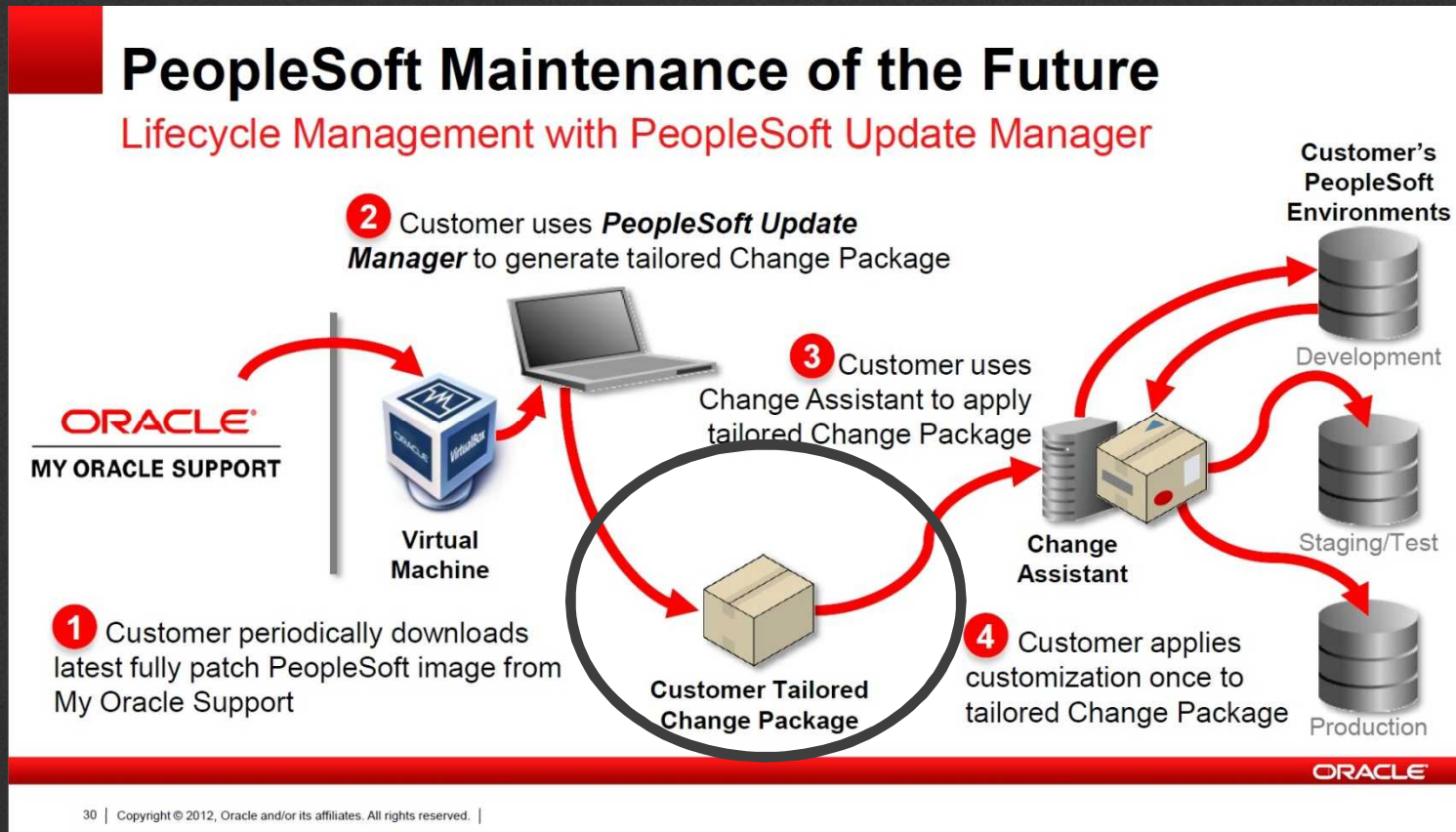
PeopleSoft Update Image	Date
PeopleSoft FSCM 9.2.011	March 9, 2015
PeopleSoft FSCM 9.2.012	May 4, 2015
PeopleSoft FSCM 9.2.013	June 29, 2015
PeopleSoft FSCM 9.2.014	September 14, 2015
PeopleSoft FSCM 9.2.015	November 9, 2015
PeopleSoft FSCM 9.2.016	December 21, 2015

Software Version Manifest Information

Installation Documentation

Additional Documentation (1)

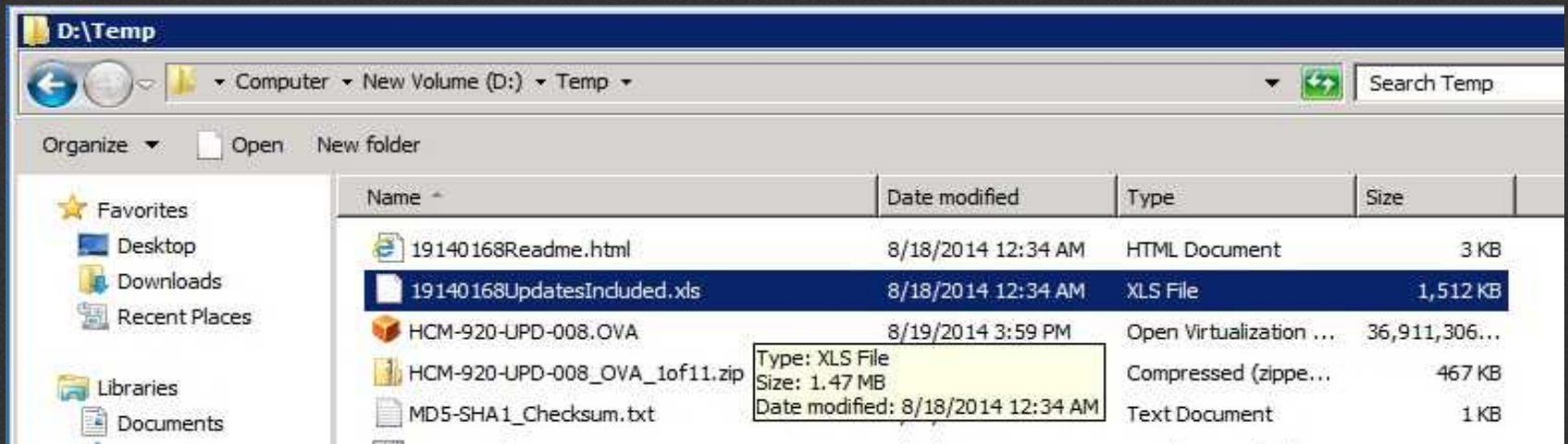
How do PUM Packages work



Reviewing What's Available

- The first (and smallest) file of each PI image contains an Excel document listing the cumulative changes included
 - This is also available with the image on Oracle Support
- Changes are listed by Image number for sorting and searching
- This is ideal for initial assessment of patches to apply
- This also allows searching for individual bug fixes

Reviewing Available Patches



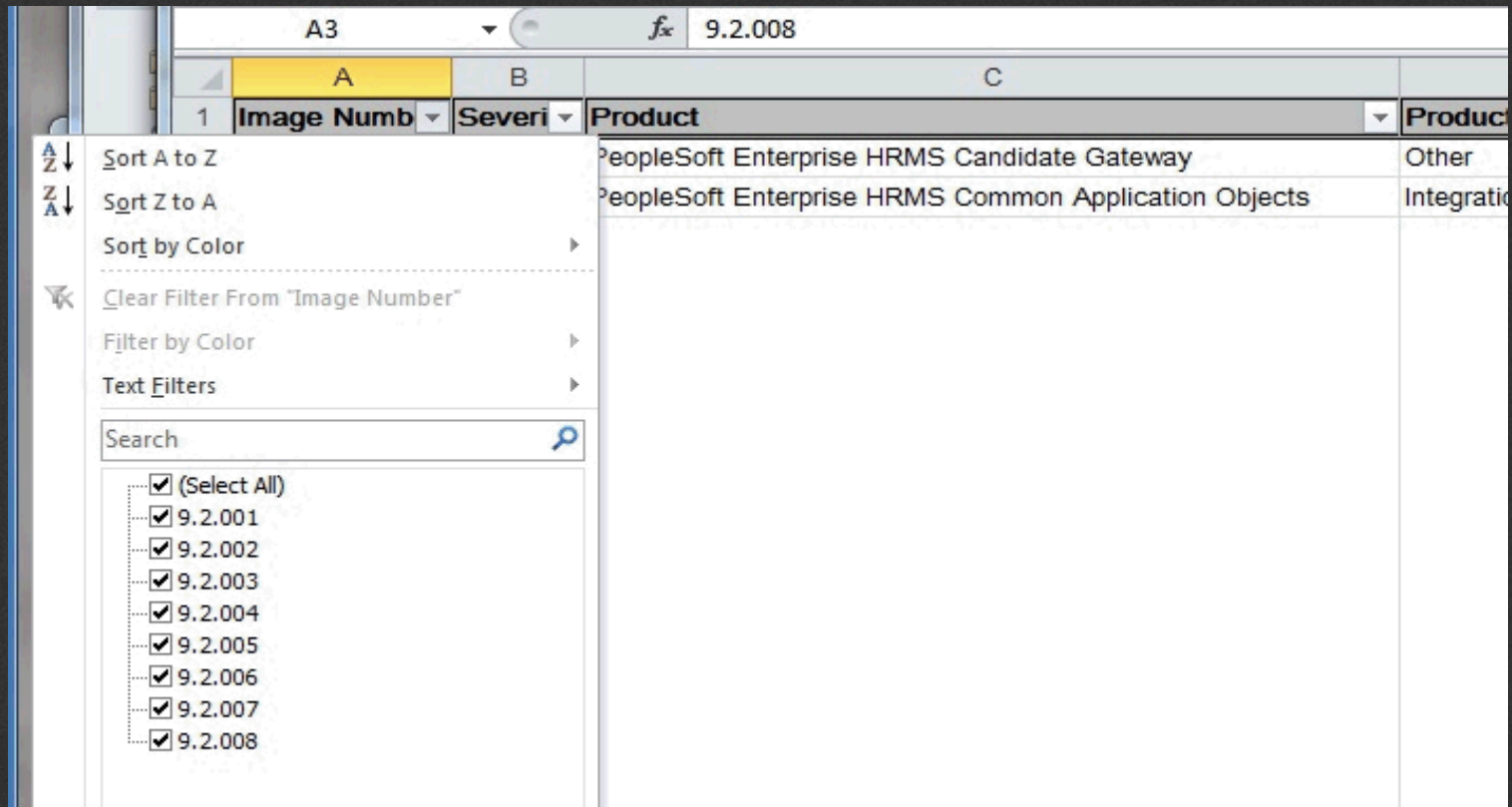
PeopleSoft HCM Update Image	Patchset Number	PUM Update Image Contents List	Date Posted
PeopleSoft Update Image HCM 9.2.011	20186928	PeopleSoft HCM 9.2.011 Update Image Contents List	January 16, 2015

Reviewing Available Patches

HCM-P111-20186928UpdatesIncluded.xls [Compatibility Mode] - Microsoft Excel

Image Numb	Severi	Product	Product Component	Bug ID	Minimum Too	Bug Type	Supplement	Bug Subject
2	9.2.011	1 PeopleSoft Enterprise HRMS Common Application Objects	Approval Framework	20126372		Bug		SYSTEM THROWS ERROR ON DENYING REPORTED TIME.
3	9.2.011	1 PeopleSoft Enterprise HRMS Common Application Objects	Events & Notifications	19955781		Bug		LONG RUNNING PROCESS FOR EOEN MESSAGES
4	9.2.011	1 PeopleSoft Enterprise HRMS Common Application Objects	MAP Mobile Approvals	20131222	8.54.00	Bug		MOBILE APPROVAL - FRAMEWORK ISSUE - PACKAGE 11A
5	9.2.011	1 PeopleSoft Enterprise HRMS Common Application Objects	MAP Mobile Approvals	20157600	8.54.00	Bug		MAP- 'MAXIMUM LINES DISPLAYED' SETTING OF MOBILE APPROVAL OPTIONS IS N
6	9.2.011	1 PeopleSoft Enterprise HRMS Common Application Objects	Workcenter Framework	19934149		Bug		SCMT003 - CONTRACT/SOURCING WORKCENTER PAGE GETS HANGED WHEN TRY
7	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll Argentina	Install	19608366		Bug		IVT- GP-PAYEE - NO SUCCESS ON ARGENTINA FOR ORACLE
8	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll Core	Global Payroll for Core	19877256		Bug		COPYING UPDATE PROJECT-PART 2(INT) FAILED FOR P110 I1 8.54 TARGET
9	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll Core	Global Payroll for Core	20201677		Bug		COBOL COMPIING FAILURES IN OS390 9.2 C406-R1 BUILD
10	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll France	Global Payroll for France	20148182		Bug		ERROR ON CREATING VIEW GPFR_DSN_EXT_VW IN MSS PLATFORM C400 GLD
11	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll France	Install	19808175		Bug		IVT- GP-PAYEE - FRANCE HAS ERROR
12	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll Spain	Global Payroll for Spain	20185645		Bug		RUNNING DATAMOVER EXPORT UPD19448867_01_EXP_DMS FAILED FOR P111 R1
13	9.2.011	1 PeopleSoft Enterprise HRMS Global Payroll UK	Global Payroll for UK	19912336		Bug		TASK "RUNNING DATA CONVERSION" AE DC17462023
14	9.2.011	1 PeopleSoft Enterprise HRMS Human Resources	HR Core	20213047		Bug		PERSON_BASIC_SYNC IS NOT PUBLISHED AFTER HR_PERSDATA
15	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	19596675		Bug		CAN: YMPE LIMIT ISSUE FOR EE BALANCES FROM PREVIOUS COMPANY FOR BOX
16	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	19597694		Bug		CAN: 2014 T4A FORM CHANGES
17	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	19598014		Bug		CAN: 2014 T4 FORM CHANGES
18	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	19977635		Bug		CAN: CREATE 2014 T4A PDF TEMPLATE FOR BI PUBLISHER PROCESSING
19	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	20003731		Bug		CAN: 2015 TAX RATES REQUIRING COBOL CHANGES
20	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	20107206		Bug		CAN: 2015 QUEBEC TAX RATES REQUIRING COBOL CHANGES
21	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Canadian Payroll	20165287		Bug		CAN: 2015 CANADIAN PAYROLL TAX & LEGISLATIVE ITEMS TOO LATE FOR 14-F DE
22	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Payroll for North America	20103643		Bug		2015 U.S. PAYROLL TAX & LEGISLATIVE ITEMS TOO LATE FOR 14-F DELIVERY
23	9.2.011	1 PeopleSoft Enterprise HRMS Payroll for North America	Payroll for North America	20104933		Bug		2015 U.S. FEDERAL WITHHOLDING TAX CHANGES
24	9.2.011	1 PeopleSoft Enterprise HRMS eCompensation	eCompensation	20183680		Bug		SYSAUDIT-PC PC-04 PEOPLECODE AUDITS
25	9.2.011	1 PeopleSoft Enterprise HRMS eProfile	Approvals	20116254	8.54.00	Bug		TRANSACTION NAME SHOULD BE UPPER CASE FOR LOCATION CHANGE

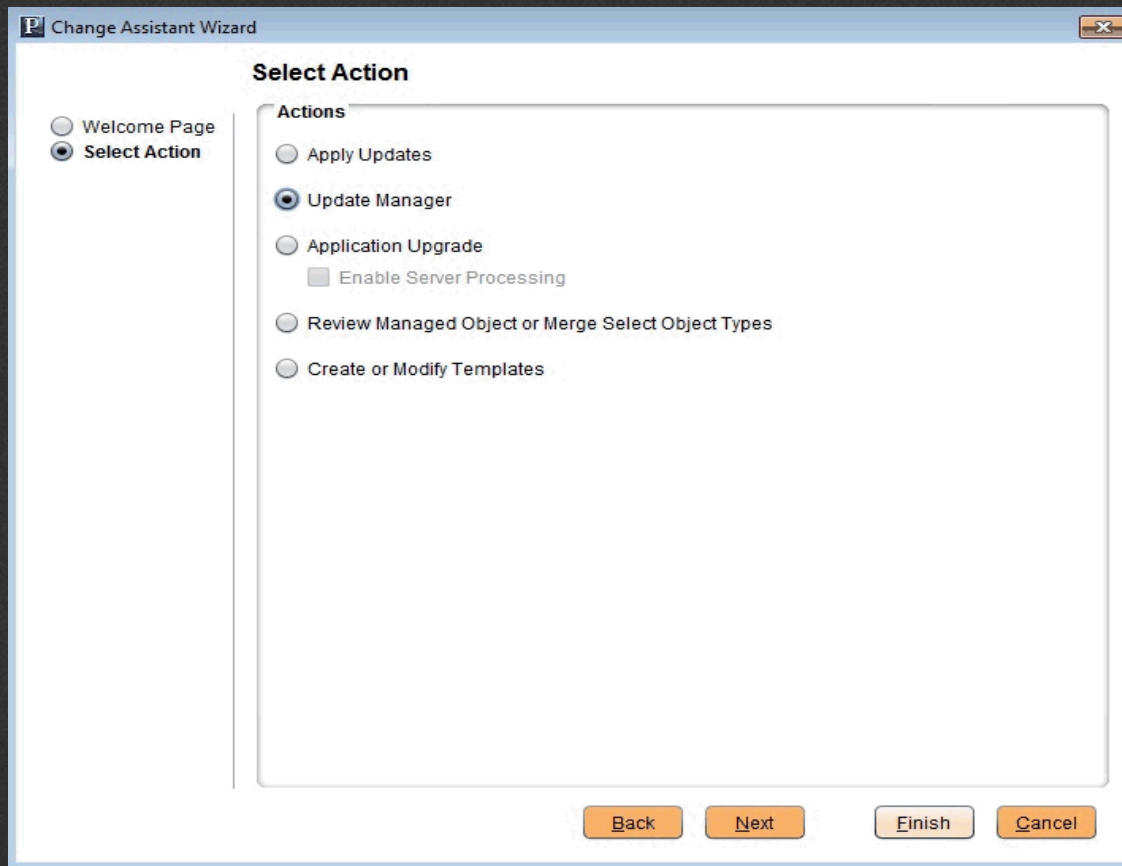
Reviewing Available Patches



The screenshot shows a software patch review interface. At the top, there is a header bar with 'A3' on the left, a formula bar with 'fx' and '9.2.008' in the center, and a tab labeled 'C' on the right. Below this is a table with columns: 'Image Numb', 'Severi', 'Product', and 'Product'. The first two rows of data are visible: 'PeopleSoft Enterprise HRMS Candidate Gateway' with 'Other' and 'PeopleSoft Enterprise HRMS Common Application Objects' with 'Integratio'. On the left side, there is a sidebar with a filter menu. The menu includes options for sorting (Sort A to Z, Sort Z to A, Sort by Color), clearing filters (Clear Filter From "Image Number"), filtering by color, and text filters. Below the menu is a search bar with a magnifying glass icon. Under the search bar, there is a list of checkboxes for selecting patches: (Select All), 9.2.001, 9.2.002, 9.2.003, 9.2.004, 9.2.005, 9.2.006, 9.2.007, and 9.2.008. All checkboxes are currently checked.

Image Numb	Severi	Product	Product
		PeopleSoft Enterprise HRMS Candidate Gateway	Other
		PeopleSoft Enterprise HRMS Common Application Objects	Integratio

New Package Through CA



The screenshot shows a Windows-style dialog box titled "Change Assistant Wizard". On the left, there are two radio buttons: "Welcome Page" and "Select Action", with "Select Action" being the selected option. The main area of the dialog is titled "Select Action" and contains a list of actions under the heading "Actions". The actions are: "Apply Updates", "Update Manager" (which is selected), "Application Upgrade", "Enable Server Processing" (which is a checkbox and currently unchecked), "Review Managed Object or Merge Select Object Types", and "Create or Modify Templates". At the bottom of the dialog, there are four buttons: "Back", "Next", "Finish", and "Cancel".

Change Assistant Wizard

☐ Welcome Page
☒ **Select Action**

Select Action

Actions

- ☐ Apply Updates
- ☒ **Update Manager**
- ☐ Application Upgrade
 - ☐ Enable Server Processing
- ☐ Review Managed Object or Merge Select Object Types
- ☐ Create or Modify Templates

Back **Next** **Finish** **Cancel**

New Package Through CA

The screenshot shows the 'Change Assistant Wizard' window. On the left, there is a sidebar with a tree view containing 'Welcome Page', 'Select Action', 'Options' (with sub-items: General, PUM Source, EM Hub, Additional), and 'Tasks' (with sub-item: Select Task). The 'Select Task' option is selected. The main area is titled 'Select Task' and asks 'What would you like to do?'. It contains two sections: 'Update Manager Tasks' and 'PeopleTools Tasks'. In 'Update Manager Tasks', 'Define or Create a New Change Package' is selected. In 'PeopleTools Tasks', 'Apply a Patch to Your Current PeopleTools Release' is selected. At the bottom, there are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

Change Assistant Wizard

Select Task

What would you like to do?

Update Manager Tasks

- ☐ Validate Change Assistant EMF Settings
- ☐ Upload Target Database Information to PUM Source
- ☒ Define or Create a New Change Package
- ☐ Apply Change Package
- ☐ Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image

PeopleTools Tasks

- ☐ Apply a Patch to Your Current PeopleTools Release
- ☐ Upgrade to a New Release of PeopleTools

Back **Next** **Finish** **Cancel**

New Package Through CA

Change Package Wizard

Define or Create a New Change Package

Create CP
☒ Search

PUM Source Database
FIN92PUM

Define a New Change Package
Change Packages are Defined in the PUM Source Database

[Click Here to Open Browser and Connect to the PUM Source Database](#)

Create a New Change Package
Change Packages are Created using Definitions in the PUM Source

Download Directory: C:\CA\Downloads\

Change Package:

☒ Create Selected Change Package Definition
☐ Proceed to Apply Change Package Wizard after Package Creation

[Back](#) [Next](#) [Finish](#) [Cancel](#)

Building a Custom Package



The image shows a screenshot of the Oracle PeopleSoft Sign In page. The page has a blue background. At the top, there is a white header bar with the Oracle logo on the left and the PeopleSoft logo on the right. Below the header, the text "Sign In" is displayed. There are three input fields: a username field containing "ps" with a clear button (X), a password field labeled "Password", and a language dropdown menu currently set to "English". Below these fields is a green "Sign In" button. At the bottom, there is a checkbox labeled "Enable Accessibility Mode".

ORACLE | PEOPLESFT

Sign In

ps X

Password

English v

Sign In

☐ Enable Accessibility Mode

Building a Custom Package

Favorites ▾

Main Menu ▾ > PeopleTools ▾ > Lifecycle Tools ▾ > Update Manager ▾ > Define Change Package

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

ORACLE

New Window | Personalize Page

Define Change Package

Step 1 of 6

Identify bugs for Change Assistant to create an environment specific Change Package from the source database.

1 2 3 4 5 6

Return to start Previous Next

Select Target Database

Select the target database to create the Change Package.

	Database Name	Field Long Name	PeopleTools Release
<input type="radio"/>	HR92UPG0		8.53.02
<input checked="" type="radio"/>	HRMDEV2	HRMDEV2	8.53.08
<input type="radio"/>	HRMPROD	HRMPROD	8.53.08
<input type="radio"/>	HRMTST2	HRMTST2	8.53.08

Packages – Selecting Pre-req's

Oracle PeopleTools 8.53.08 Update Manager - Define Change Package

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

ORACLE

Select Search Criteria

Select Criteria to search for Bugs and create Change package

Database Name	HRMDEV2	PeopleTools Release	8.53.08
Environment Long Name	HRMDEV2		
Package Name	TESTPKG		

Critical Search Criteria ?

Add Critical Search Criteria to any other Search

☒ True Post-Requisites for (Select) Previously Applied Fixes ?

Additional Search Criteria ?

Add Additional Search Criteria to narrow the scope of your Search

- ☐ Product Family ?
- ☐ Installed Products
- ☐ Severity
- ☐ Image Number
- ☒ Translations Only
- ☐ Standard Search Criteria ?
- ☐ Advanced Search Criteria ?

Packages – Selecting Type

Add Additional Search Criteria to narrow the scope of your Search

☒ Product Family ?

☒ Include Related Component and SubComponents ?

Select one or more Values

Value	Description
<input type="checkbox"/> PNA	Payroll North America
<input type="checkbox"/> HR	Human Resources
<input type="checkbox"/> GP	Global Payroll

☐ Installed Products

☐ Severity

☐ Image Number

☐ Translations Only

☐ Standard Search Criteria ?

☒ Advanced Search Criteria ?

Select one or more Values

Tracking Group

Value

Find | View All | First | 1-3 of 3 | Last

Look Up Tracking Group

Search by: Tracking Group begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-3 of 3 Last

Tracking Group
Enhancement
Multi-Instance
Tax Update (PSFT)

Packages – Selecting Details

Add Additional Search Criteria to narrow the scope of your Search

☒ Product Family ?

☒ Include Related Component and SubComponent ?

Select one or more Values

Value	Description
<input type="checkbox"/> PNA	Payroll North America
<input type="checkbox"/> HR	Human Resources
<input type="checkbox"/> GP	Global Payroll

☐ Installed Products

☐ Severity

☐ Image Number

☐ Translations Only

☐ Standard Search Criteria ?

☒ Advanced Search Criteria ?

Select one or more Values

Tracking Group Value

Tax Update (PSFT) ?

Look Up Value

Search by: TAG Value begins with

Look Up

Cancel

Advanced Lookup

Search Results

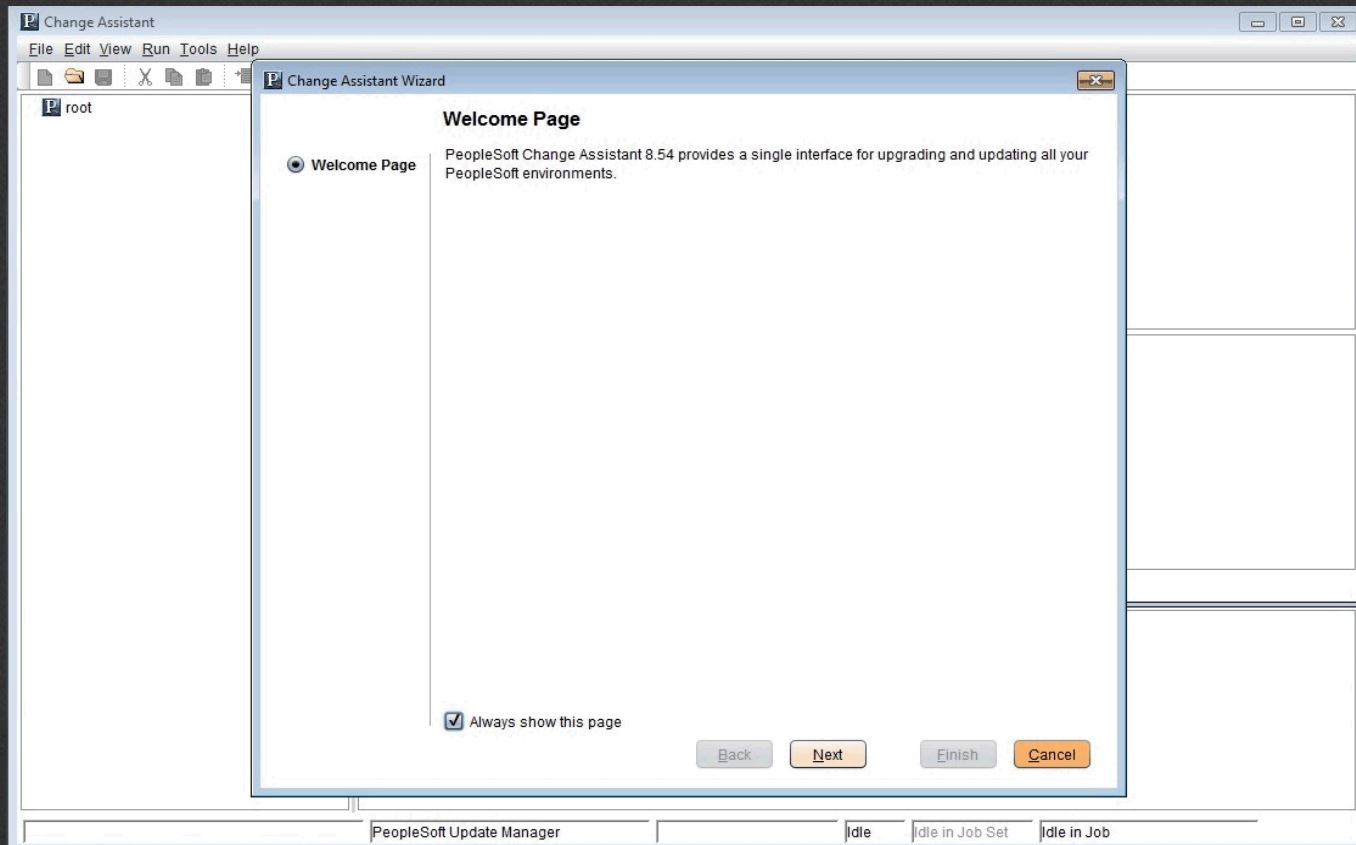
View 100 First 1-7 of 7 Last

TAG Value
Tax Update 13-A
Tax Update 13-B
Tax Update 13-C
Tax Update 13-D
Tax Update 13-E
Tax Update 13-F
Tax Update 14-A

Package Application

Using CA to apply the PUM package

Package Application



Package Application

The screenshot shows a Windows-style dialog box titled "Change Assistant Wizard". On the left, there is a vertical list of steps: "Welcome Page" and "Select Action". The "Select Action" step is currently selected, indicated by a filled radio button. The main area of the dialog is titled "Select Action" and contains a list of actions under the heading "Actions". The actions are: "Apply Updates", "Update Manager" (which is selected with a filled radio button), "Application Upgrade" (which has a sub-option "Enable Server Processing" with an unchecked checkbox), "Review Managed Object or Merge Select Object Types", and "Create or Modify Templates". At the bottom of the dialog, there are four buttons: "Back", "Next", "Finish", and "Cancel".

Change Assistant Wizard

Select Action

☐ Welcome Page
☒ Select Action

Actions

☐ Apply Updates
☒ Update Manager
☐ Application Upgrade
 ☐ Enable Server Processing
☐ Review Managed Object or Merge Select Object Types
☐ Create or Modify Templates

Back Next Finish Cancel

Package Application

The screenshot shows the 'Change Assistant Wizard' window. On the left, there is a sidebar with a tree view. Under 'Options', 'General' is selected. Under 'Tasks', 'Select Task' is selected. The main area is titled 'Select Task' and contains the question 'What would you like to do?'. There are two sections: 'Update Manager Tasks' and 'PeopleTools Tasks'. In 'Update Manager Tasks', 'Apply Change Package' is selected. In 'PeopleTools Tasks', 'Apply a Patch to Your Current PeopleTools Release' is selected. At the bottom, there are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

Change Assistant Wizard

Select Task

What would you like to do?

Update Manager Tasks

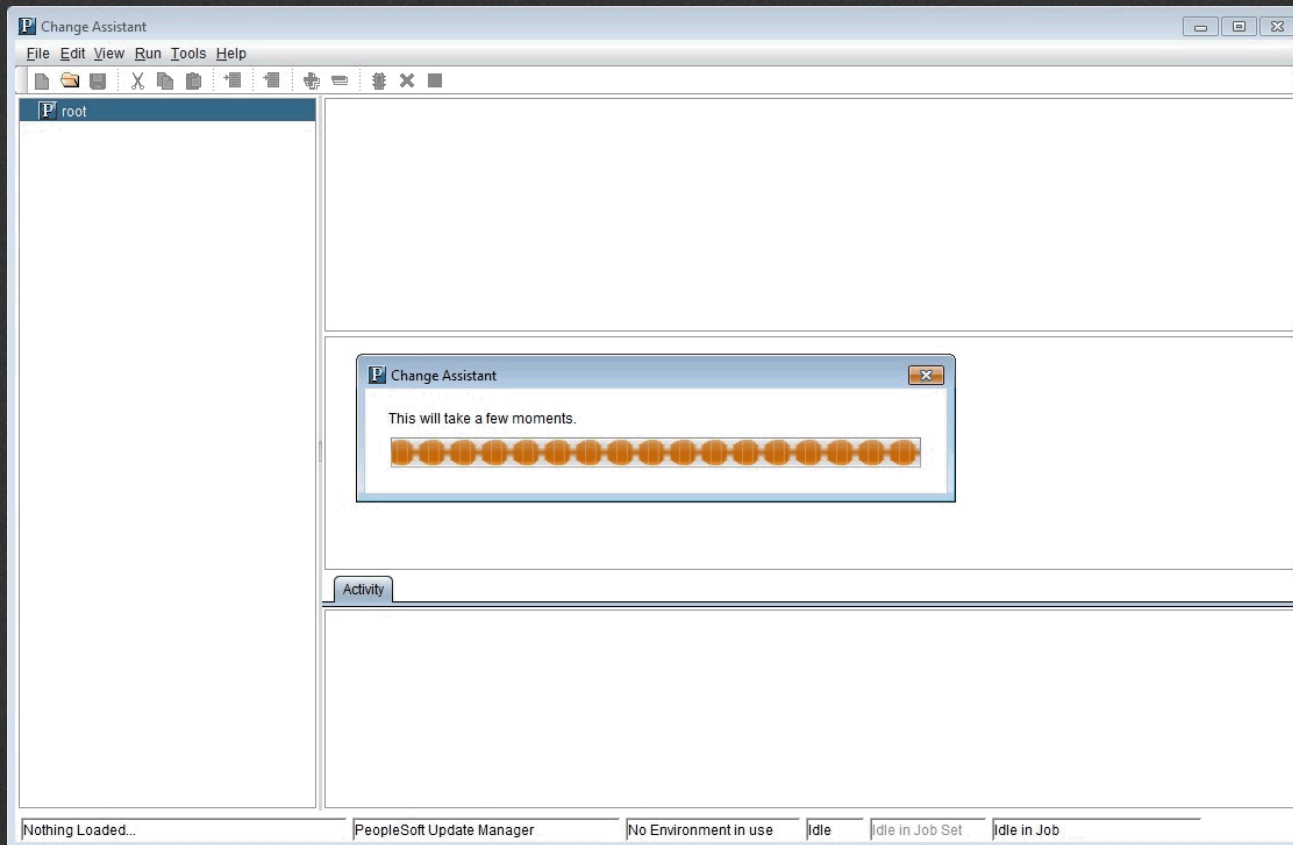
- ☐ Validate Change Assistant EMF Settings
- ☐ Upload Target Database Information to PUM Source
- ☐ Define or Create a New Change Package
- ☒ Apply Change Package
- ☐ Apply Downloaded PeopleSoft Release Patchset to PeopleSoft Image

PeopleTools Tasks

- ☐ Apply a Patch to Your Current PeopleTools Release
- ☐ Upgrade to a New Release of PeopleTools

Back **Next** **Finish** **Cancel**

Package Application



Package Application

Change Package Wizard

Change Package Settings

Task Steps

- ☒ Settings

PUM Source Database
HCM92PUM

Download Directory: C:\CAIDownloads\

Change Package: updTAX14F.zip

Apply Type

- ☒ Initial Pass
 - ☒ All Steps
 - ☐ Source Steps Only
 - ☐ Target Steps Only
 - ☐ Move To Production

Synchronize Target Metadata (Requires Source) ☒ Yes ☐ No

Back Next Finish Cancel

Package Application

Change Package Wizard

Select Target Database

Task Steps

- ☐ Settings
- ☒ Select Target

Target Database: **HRMADTST** **Create**

Select	Host	DB Name	DB Version	EMHUB-Enabled
<input type="checkbox"/>		HRMADTST	8.53.15	Yes
<input type="checkbox"/>		HRMCFG	8.53.15	Yes
<input type="checkbox"/>		HRMDEV	8.53.15	Yes
<input type="checkbox"/>		HRMPROD	8.53.15	Yes
<input type="checkbox"/>		HRMUAT	8.53.15	Yes

Login Information

User ID:

Access ID:

Connect ID:

DBOwner ID:

Current Homes

PS Home:

PS App Home:

PS Cust Home:

SQL Query Tool:

Back **Next** **Finish** **Cancel**

Package Application

Database Wizard

Define Database

Task Steps

- Define Database

Type: Oracle

Database Name: HRMFIX

User Information

User ID: PS User Password: *****

Access ID: sysadm Access Password: *****

Connect ID: people Connect Password: *****

☐ Set DB Owner Credentials

DBOwner ID: DBOwner Password:

Current Homes

PS Home: c:\pssoft\pt853\

PS App Home: c:\pssoft\pt853\

PS Cust Home: c:\pssoft\pt853\

New Homes

☐ Set path information

☐ Connect to Database using New PS Home

PS Home:

PS App Home:

Back Next Finish Cancel

Package Application

Database Wizard

Define Database

Task Steps

- Define Database

Type: Oracle

Database Name: HRMFIX

User Information

User ID:	PS	User Password:	*****
Access ID:	sysadm	Access Password:	*****
Connect ID:	people	Connect Password:	*****

Change Assistant

Testing connection...

PS App Home: c:\pssoft\pt853\

PS Cust Home: c:\pssoft\pt853\

New Homes

☐ Set path information

☐ Connect to Database using New PS Home

PS Home: c:\pssoft\pt853\

PS App Home: c:\pssoft\pt853\

Back Next Finish Cancel

Package Application

Database Wizard

Task Steps

- ☐ Define Database
- ☒ Additional Details

Additional Database Details

Unicode: ☐

Products: UPG,TL,SC,PY,HR,GUS,EL,DI,EY,EO,EO,BA

Product Line: HRMS and Campus Solutions

Industry: All

Languages: ENG

Base Language: ENG

Database Version: 8.53.15

Back Next Finish Cancel

Package Application

Database Wizard

Confirm Settings

Task Steps

- ☐ Define Database
- ☐ Additional Details
- ☒ Confirmation

Environment Summary for 'HRMFIK'

Name: HRMFIK
Database:
Name: HRMFIK
Platform: Oracle
Unicode: No
User ID: PS
Connect ID: people
Access ID: sysadm
DB Owner ID: Not Set
Product Line: HRMS and Campus Solutions
Industry: All
Products: UPG, TL, SC, PY, HR, GUS, EL, DI, EY, EO, EO, BA
Languages: ENG
BaseLanguage: ENG
Database Version: 8.53.15
SQL Query Tool: C:\oracle\product\12.1.0\64-bit\sqlplus.exe
PS Home: c:\pssoft\pt853\
PS App Home: c:\pssoft\pt853\
PS Cust Home: c:\pssoft\pt853\
Use PeopleSoft Test Framework: No
Use Process Scheduler: No

Back Next Finish Cancel

Package Application

Change Package Wizard

Select Target Database

Task Steps

- ☐ Settings
- ☒ Select Target

Target Database:

Select File Server

Select	Host Name	Path	Release
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Login Information

User ID:

Access ID:

Connect ID:

DBOwner ID:

Current Homes

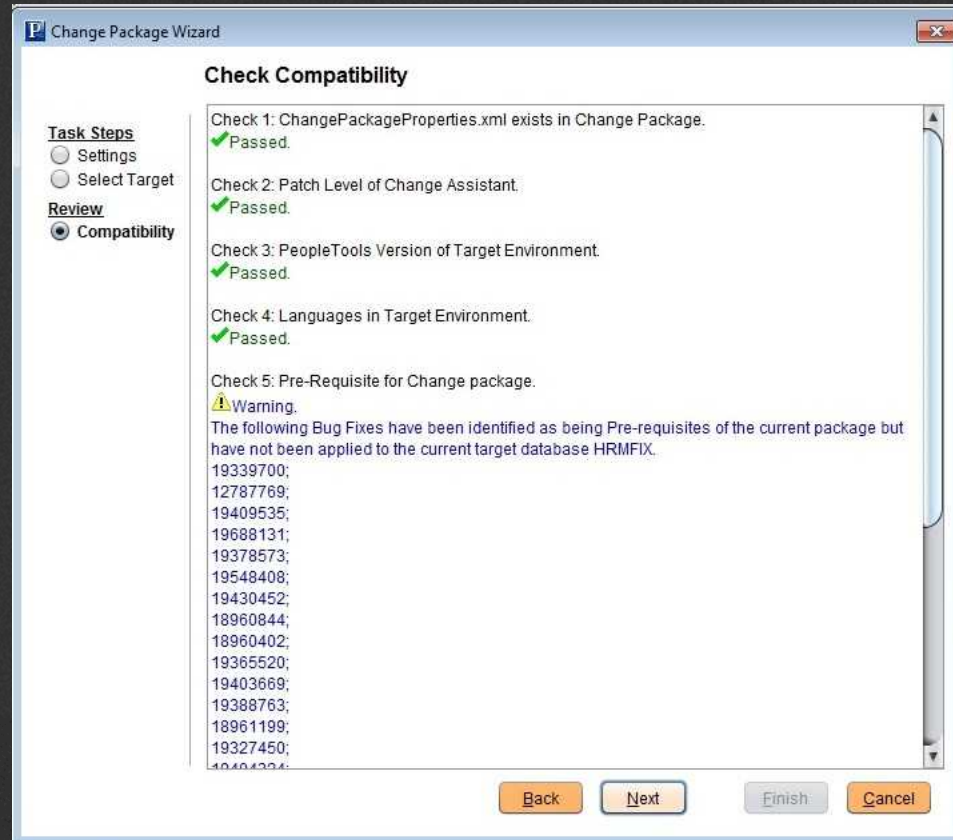
PS Home:

PS App Home:

PS Cust Home:

SQL Query Tool:

Package Application



Package Application

The screenshot shows the 'Change Package Wizard' dialog box, specifically the 'Apply Summary' step. The window has a title bar with the text 'Change Package Wizard' and standard Windows window controls. On the left side, there is a 'Task Steps' section with three radio buttons: 'Settings', 'Select Target', and 'Summary'. The 'Summary' button is selected. Below this is a 'Review' section with two radio buttons: 'Compatibility' and 'Summary'. The 'Summary' button is also selected. The main area of the dialog is titled 'Apply Summary' and contains a text box with the following information:

Change Package 'updTAX14F.zip' will be applied to 'HRMFIX'.

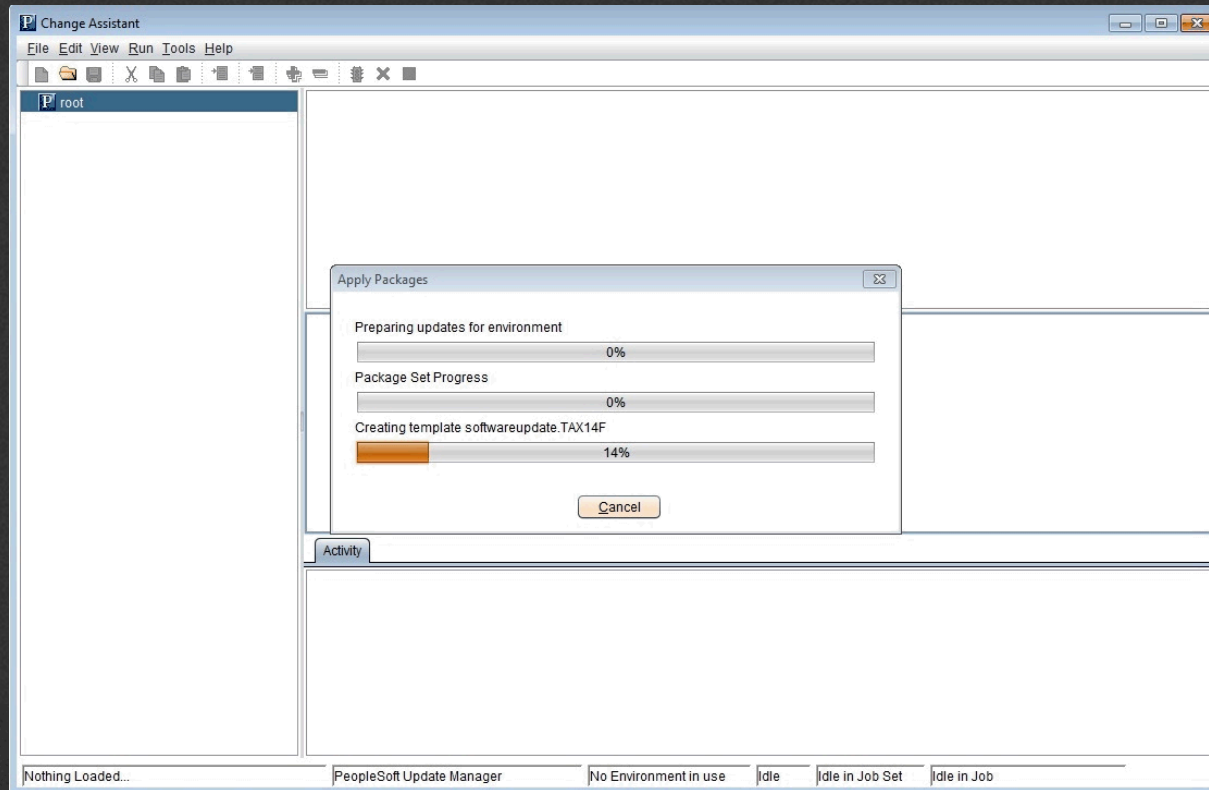
Download Directory: C:\CA\Downloads\
Apply Type: Initial Pass (All Steps)
Synchronize Target Metadata: Yes

Target Environment:
Name: HRMFIX
Database:
Name: HRMFIX
Platform: Oracle
Unicode: No
User ID: PS
Connect ID: people
Access ID: sysadm
DB Owner ID: Not Set
Product Line: HRMS and Campus Solutions
Industry: All
Products: UPG, TL, SC, PY, HR, GUS, EL, DI, EY, EO, EO, BA
Languages: ENG
BaseLanguage: ENG
Database Version: 8.53.15
SQL Query Tool: C:\oracle\product\12.1.0\64-bit\sqlplus.exe
PS Home: c:\pssoft\pt853\
PS App Home: c:\pssoft\pt853\
PS Cust Home: c:\pssoft\pt853\
Use PeopleSoft Test Framework: No
Use Process Scheduler: No

PI Environment:
Name: HCM92PUM

At the bottom of the dialog, there are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'. The 'Next' button is disabled.

Package Application



Package Application

The screenshot shows the 'Change Assistant' application window. The left pane displays a tree view of tasks, with 'Review Change Package' selected. The right pane shows a table with the following data:

Description	Start Time	End Time	Duration	Total Duration	Status
Review Change Package			00:00:00	00:00:00	Stopped

A 'Change Assistant Message' dialog box is open, displaying an information icon and the text: 'Manual stop encountered at Step: Review Change Package'. Below this, it says: 'We recommend that you delete the database and thoroughly test it before you apply it to your production database. Identify any changes delivered in this application update. If the update has been applied, it is recommended that you delete the database and thoroughly test it before you apply it to your production database.' An 'OK' button is at the bottom right of the dialog.

The 'Activity' pane at the bottom shows the message: 'Step stopped at Review Change Package.'

The status bar at the bottom of the window displays: 'softwareupdate.TAX14F.{6f520b50-1691-11e4-9... | PeopleSoft Update Manager | softwareupdate.HRMFIX... | Runni... | 1 of 1 jobs runn... | 0 % of the job has completed'

Package Application

The screenshot shows the 'Change Assistant' application window. The left pane displays a tree view of the update process steps. The 'Review Change Package' step is selected and highlighted in red. The right pane shows the details for this step, including a table with job execution data and a descriptive text block.

Description	Start Time	End Time	Duration	Total Duration	Status
Review Change Package			00:00:00	00:00:00	Stopped

Review Change Package

We recommend that you first install this update to your Customized Development or Test database and thoroughly test it before you apply it to your production databases. We recommend that you run the Upgrade Comparison report to identify any changes delivered in this application update that may impact any customizations that you have made to your databases. After the update has been applied, it is recommended that you delete the Application Server and Process Scheduler Server cache.

Activity

Step stopped at Review Change Package.

softwareupdate.TAX14F.(6f520b50-1691-11e4-9... | PeopleSoft Update Manager | softwareupdate.HRMFIX... | Runni... | 1 of 1 jobs run... | 0 % of the job has completed

Skipping Manual Steps *

The screenshot shows the 'Change Assistant' application window. The left pane displays a tree view of tasks, with 'Reviewing CP Compare Reports' selected. The right pane shows the details for the 'Copying Customized Codeline Objects' step, including a description and an activity section.

Description	Start Time	End Time	Duration	Total Duration	Status
Copying Customized Codeline Objects			00:00:00	00:00:00	Stopped

Copying Customized Codeline Objects

In this step you will copy any customized codeline objects, required for the application of this package, that are not already in the Staging Directory to the Staging Directory. By adding these files to this location they will be included in the modified Change Package zip file that can then be used for deployment against additional Target Databases.

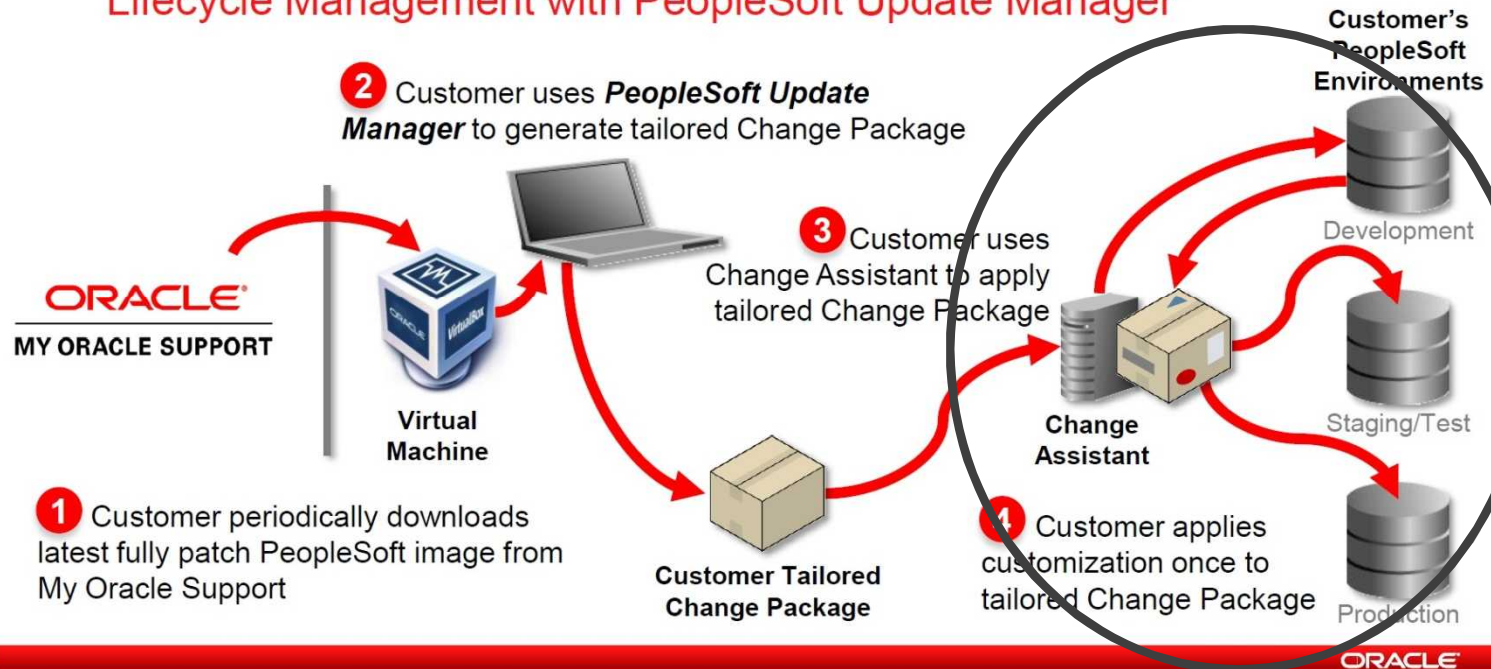
Activity

softwareupdate.TAX14F.(7848b82c-8788-11e4-a... | PeopleSoft Update Manager | softwareupdate.HRMDE... | Runni... | 1 of 1 jobs runn... | 0 % of the job has completed

Additional Environments

PeopleSoft Maintenance of the Future

Lifecycle Management with PeopleSoft Update Manager



Additional Environments

[Favorites](#) > [Main Menu](#) > [PeopleTools](#) > [Lifecycle Tools](#) > [Update Manager](#) > [Review Change Packages](#)

ORACLE

All Search

Review Package

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: Package Name ▼ begins with

Search Advanced Search

Search Results

View All First 1-4 of 4 Last

Package Name	Database Name	User ID	Last Update Date/Time
BUG19469028	HRMADTST	PS	02/19/2015 8:50:09PM
BUG19578120	HRMADTST	PS	02/03/2015 10:35:57PM
COMPDIR	HRMADTST	PS	02/05/2015 10:41:04PM
TAX15A	HRMADTST	PS	01/21/2015 6:53:12PM

Migrating Packages

- Start with CA, Select Update Manager
- Select the existing package
- Apply as you did before

Wrap-Up / Lessons Learned / Tips & Tricks

Things I wish I'd known

- Watch the Oracle PUM videos on YouTube
- Plan for **more** environments than you think you'll need
- Spec out and set up your PUM Server / Environment EARLY in the upgrade process
- Plan for the future, you'll be using PUM extensively throughout the product lifecycle

Questions?

Contact

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