

PUM in the Real World

Session #34392

March 17, 2015

Your Presenter

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- Principal Software Systems Engineer
Sandia National Laboratories
- Formerly ERP Application Architect
City of Albuquerque

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

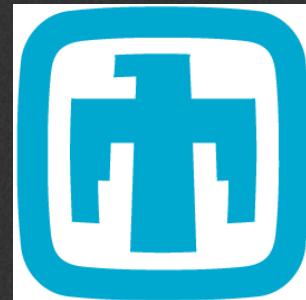
City of Albuquerque & Oracle

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



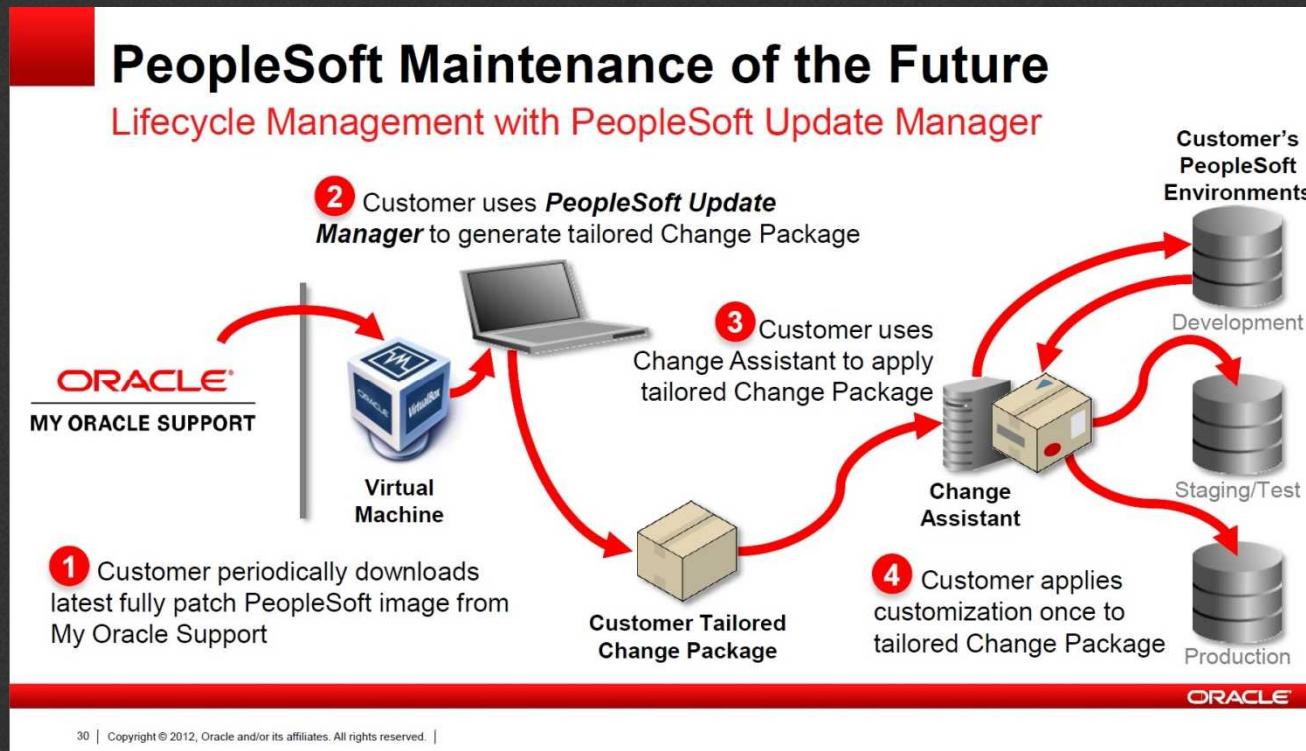
Sandia National Laboratories & Oracle

- PeopleSoft
- HCM
- Currently Upgrading



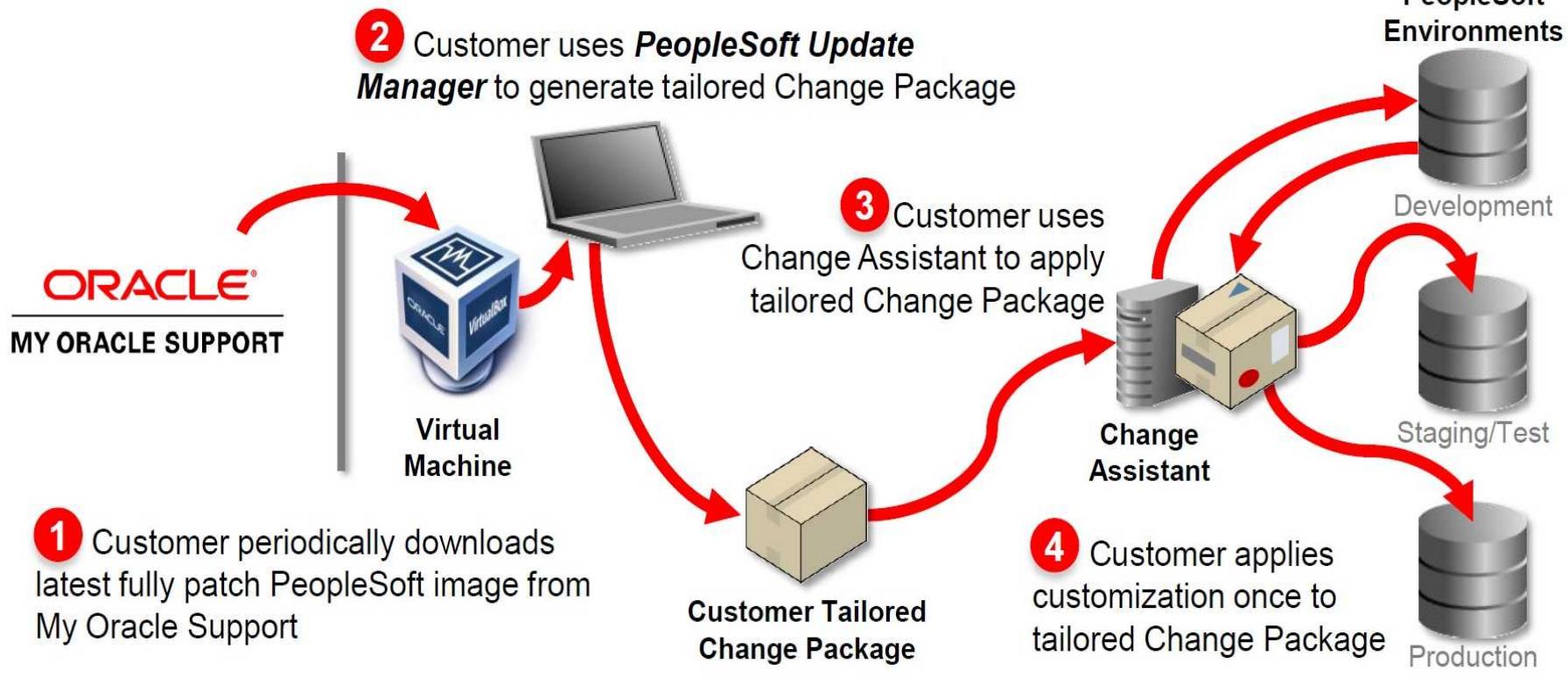
**Sandia
National
Laboratories**

PUM Overview



PeopleSoft Maintenance of the Future

Lifecycle Management with PeopleSoft Update Manager

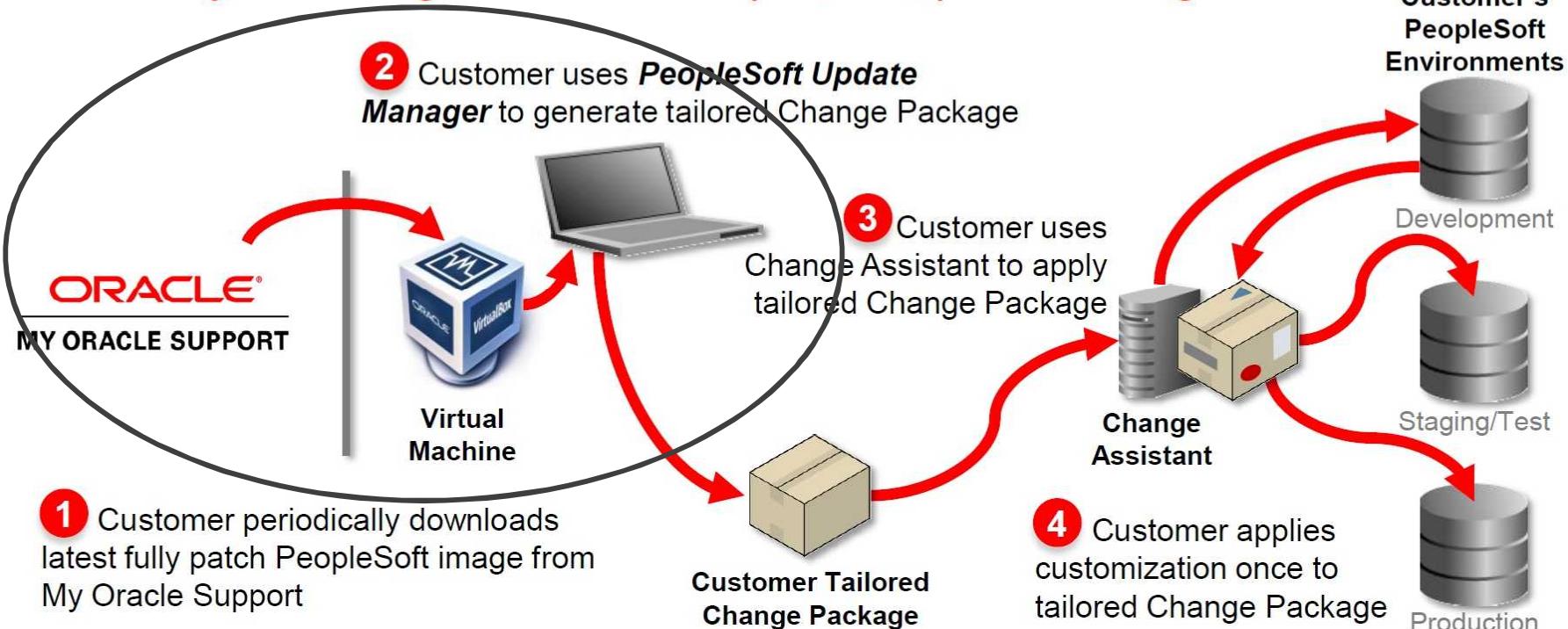


When is PUM Needed?

- 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

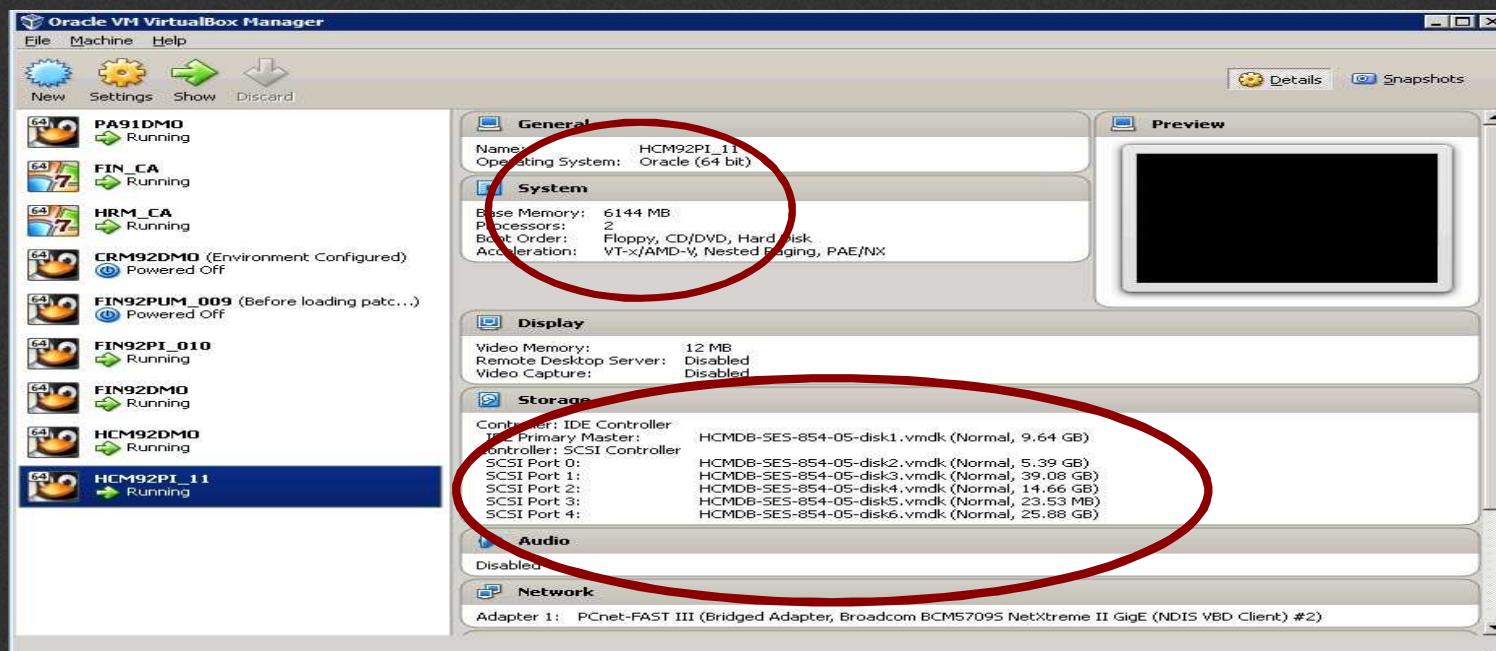


PUM Server

- 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

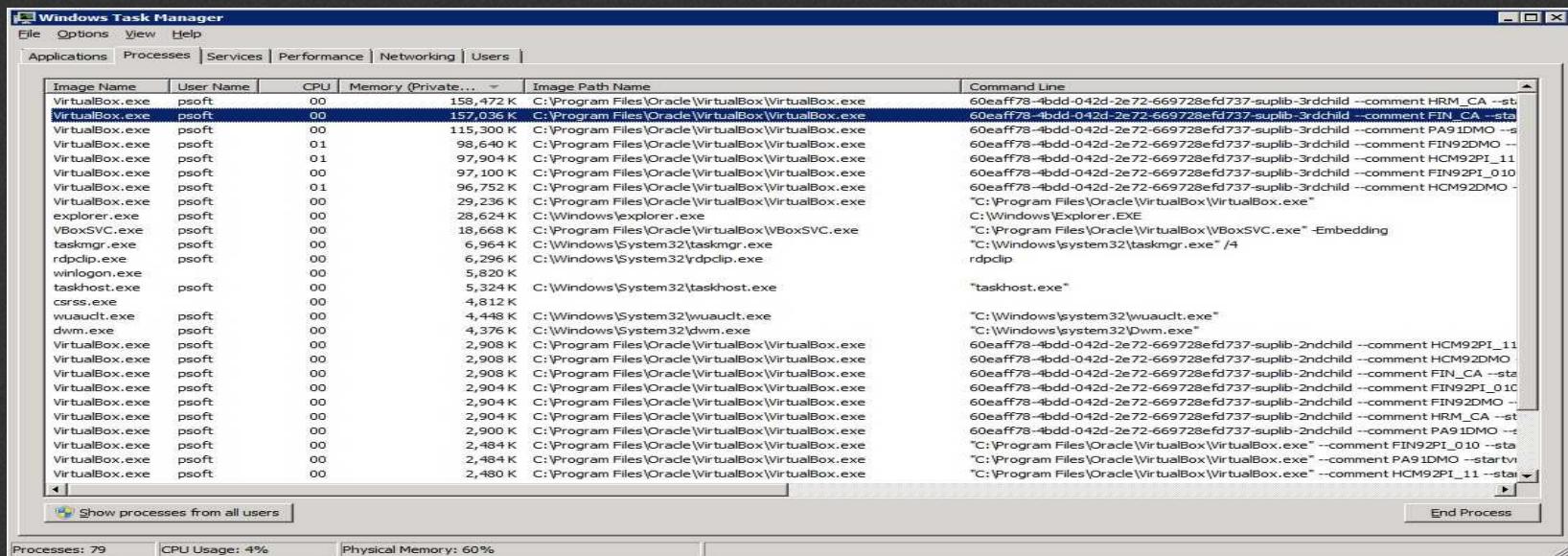
RAM / CPU

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



RAM / CPU

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 - However, when running they generally take much less



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

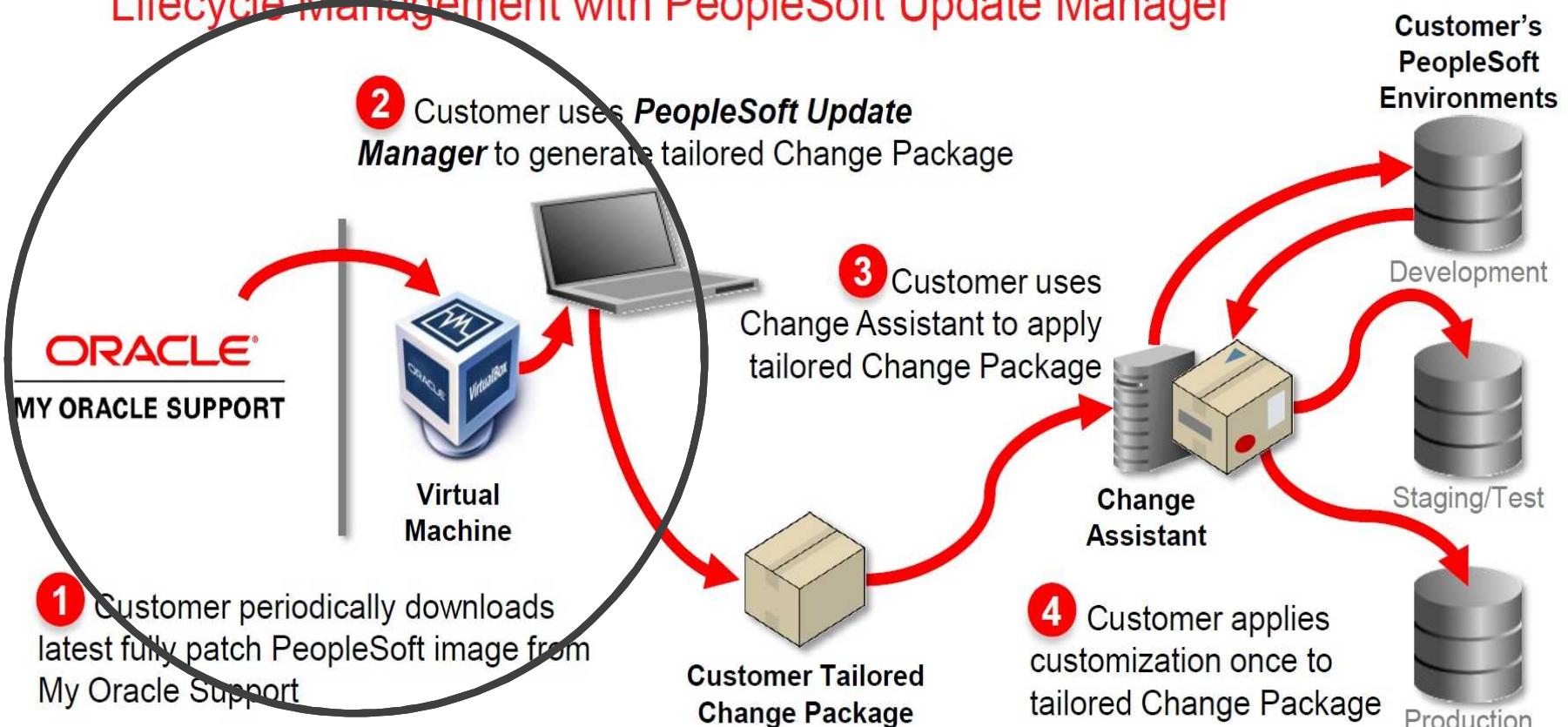
- Consider using a VM for your CA desktop machine
- Allows a connection from the backbone (if your network folks will allow it)
- Generally more stable
- No worries about someone undocking or rebooting the machine
- PI images > .09 are delivered with PT8.54
 - Therefore you'll need to use CA 8.54, but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



Obtaining PUM (PI) Images

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

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 Aubrejua](#)
- [PeopleSoft 9.2 Delivery Model](#)

Obtaining PUM (PI) Images



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 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.

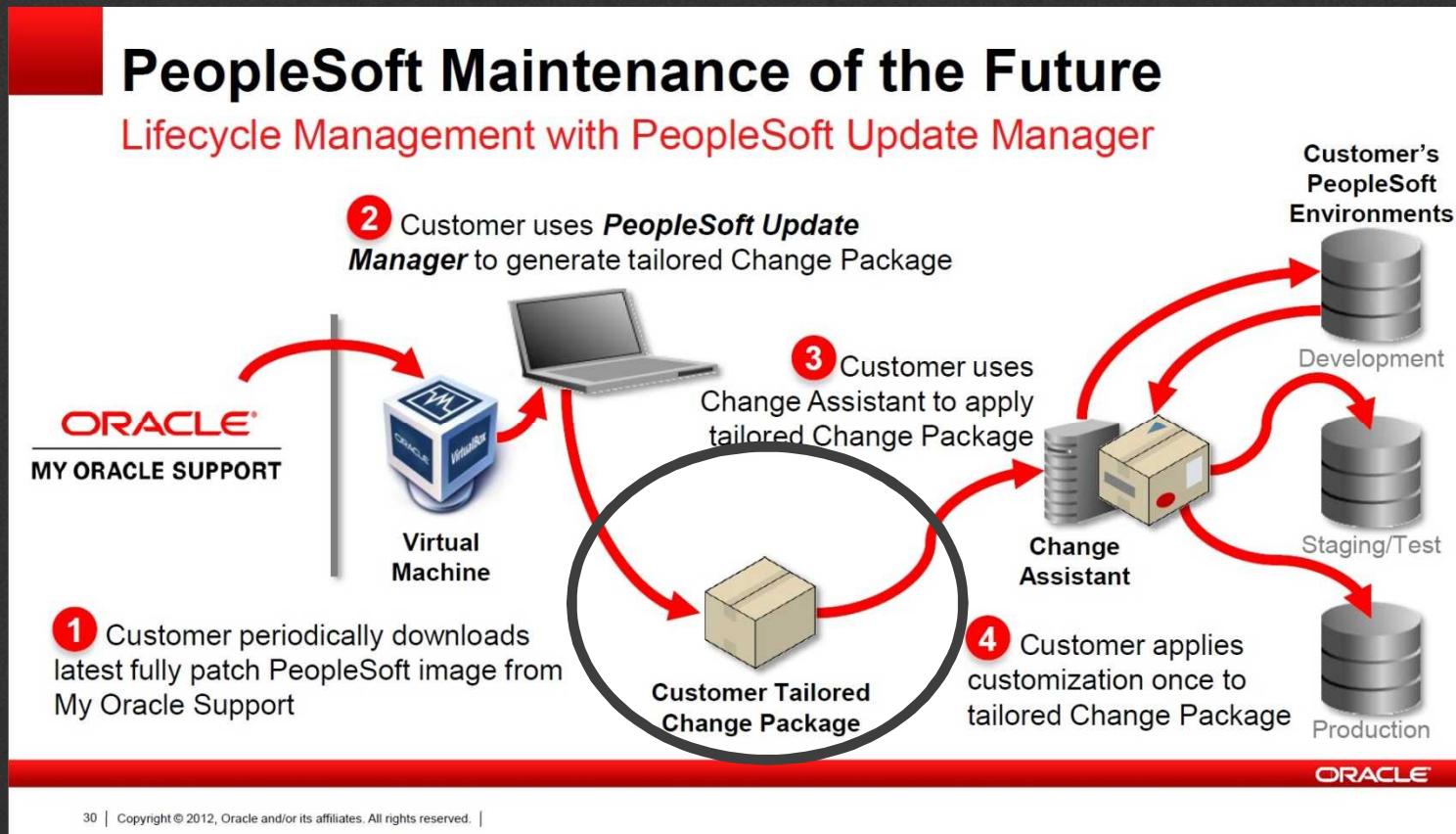
PeopleSoft Update Image	Date
PeopleSoft FSCM 9.2.011	March 9, 2015
PeopleSoft FSCM 9.2.012	May 4, 2015
PeopleSoft FSCM 9.2.013	June 29, 2015
PeopleSoft FSCM 9.2.014	September 14, 2015
PeopleSoft FSCM 9.2.015	November 9, 2015
PeopleSoft FSCM 9.2.016	December 21, 2015

 Software Version Manifest Information

 Installation Documentation

 Additional Documentation (1)

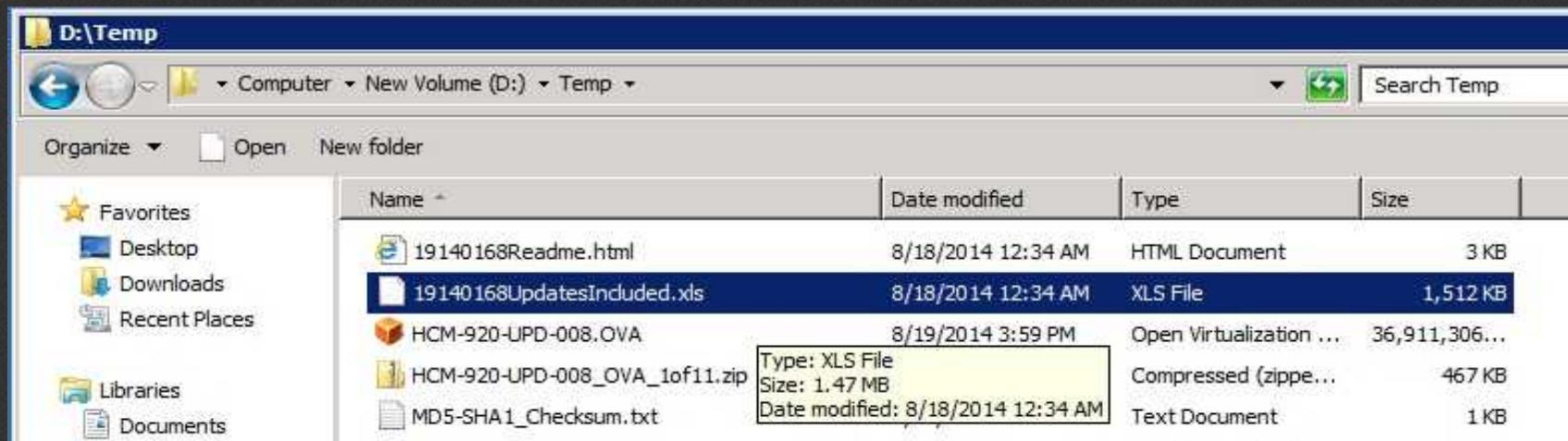
How do PUM Packages work



Reviewing What's Available

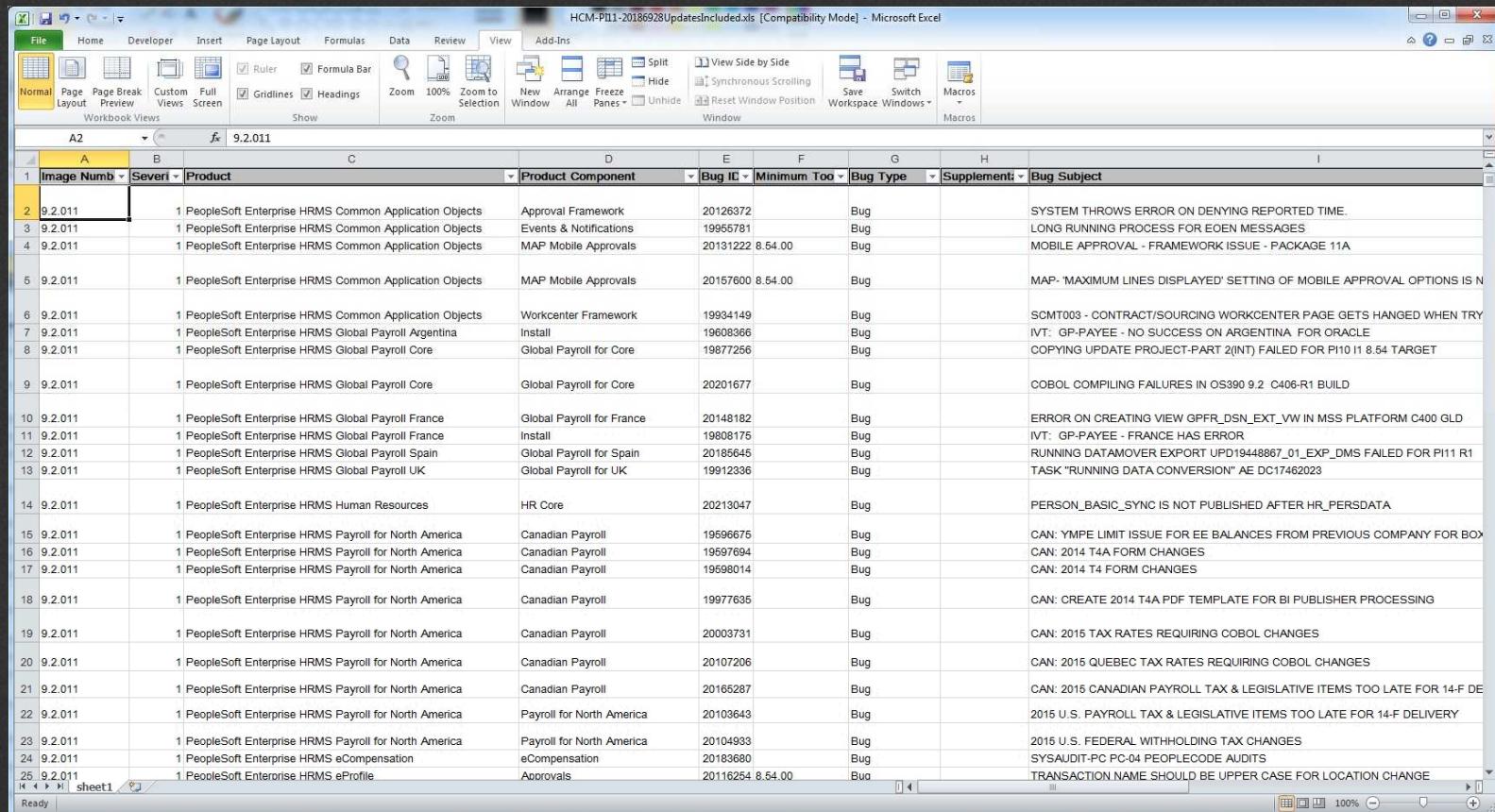
- The first (and smallest) file of each PI image contains an Excel document listing the cumulative changes included
 - This is also available with the image on Oracle Support
- Changes are listed by Image number for sorting and searching
- This is ideal for initial assessment of patches to apply
- This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

Reviewing Available Patches



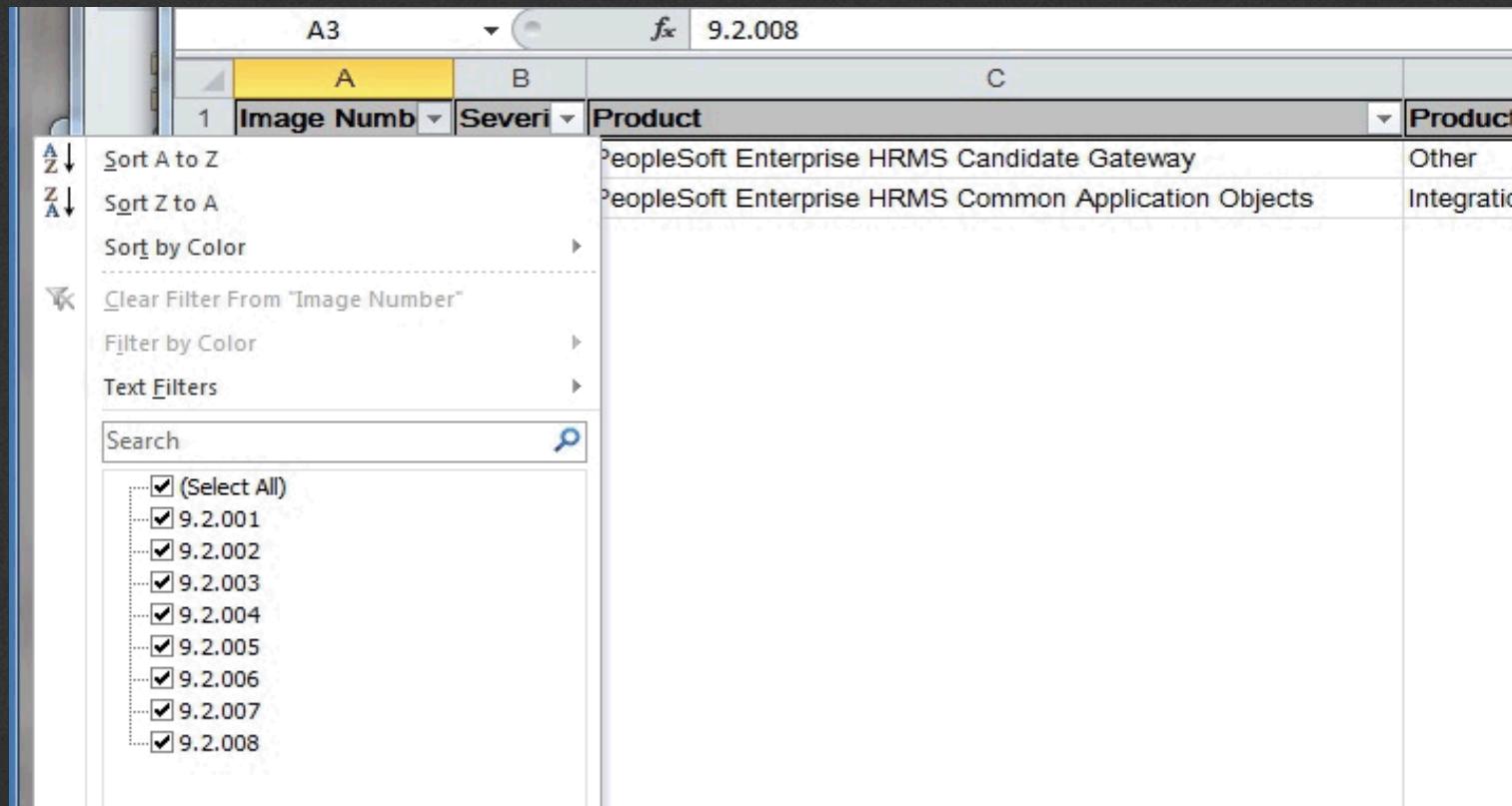
PeopleSoft HCM Update Image	Patchset Number	PUM Update Image Contents List	Date Posted
PeopleSoft Update Image HCM 9.2.011	20186928	PeopleSoft HCM 9.2.011 Update Image Contents List	January 16, 2015

Reviewing Available Patches



	A	B	C	D	E	F	G	H	I
1	Image Num	Severity	Product	Product Component	Bug ID	Minimum Too	Bug Type	Supplements	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	19956781		Bug		LONG RUNNING PROCESS FOR EEN 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 PI1011 8.54 TARGET
9	9.2.011		1 PeopleSoft Enterprise HRMS Global Payroll Core	Global Payroll for Core	20201677		Bug		COBOL COMPILING 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 PI11 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



A screenshot of a spreadsheet application showing a list of patches. The spreadsheet has columns labeled 'Image Numbr', 'Severi', and 'Product'. The 'Image Numbr' column is currently sorted by color. A filter sidebar on the left is open, showing a list of patch versions from 9.2.001 to 9.2.008, with all checkboxes checked.

Image Numbr	Severi	Product
9.2.001	PeopleSoft Enterprise HRMS Candidate Gateway	Other
9.2.002	PeopleSoft Enterprise HRMS Common Application Objects	Integration
9.2.003		
9.2.004		
9.2.005		
9.2.006		
9.2.007		
9.2.008		

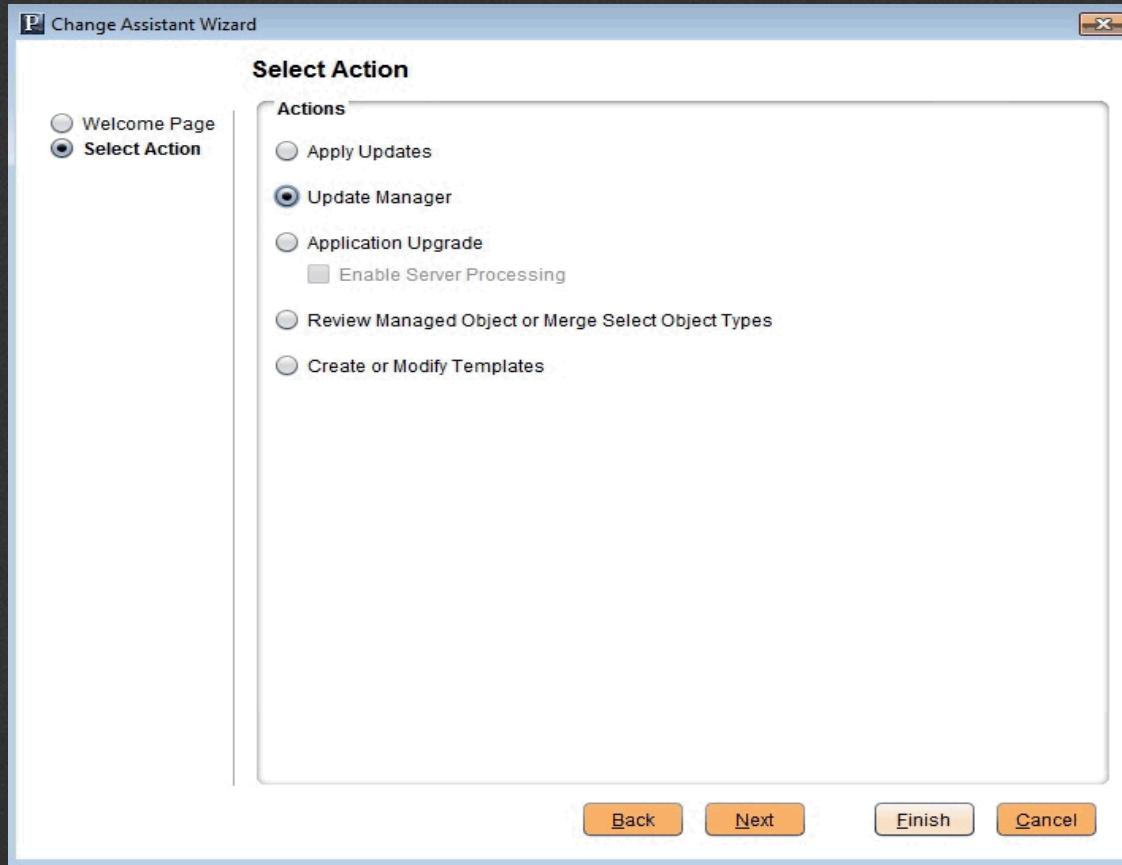
Filter sidebar (left):

- Sort A to Z
- Sort Z to A
- Sort by Color
- Clear Filter From "Image Number"
- Filter by Color
- Text Filters

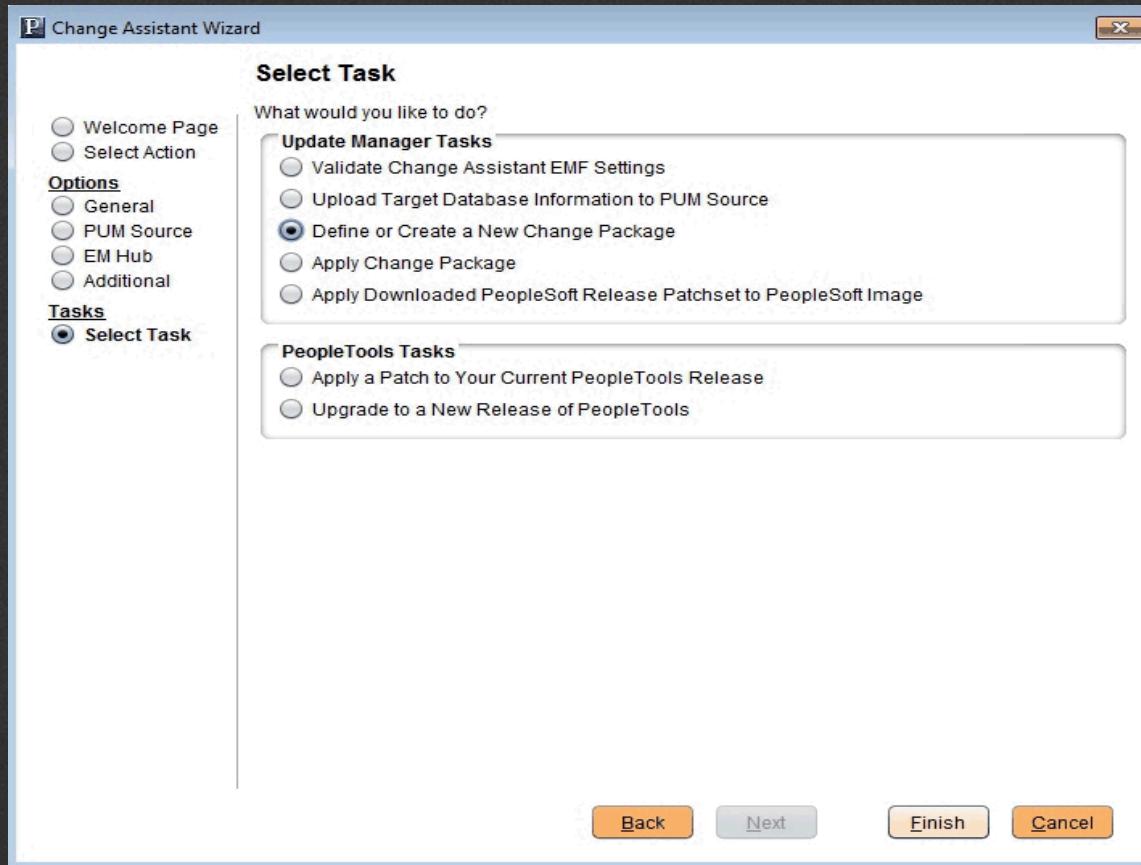
Search (Text Filters):

- (Select All)
- 9.2.001
- 9.2.002
- 9.2.003
- 9.2.004
- 9.2.005
- 9.2.006
- 9.2.007
- 9.2.008

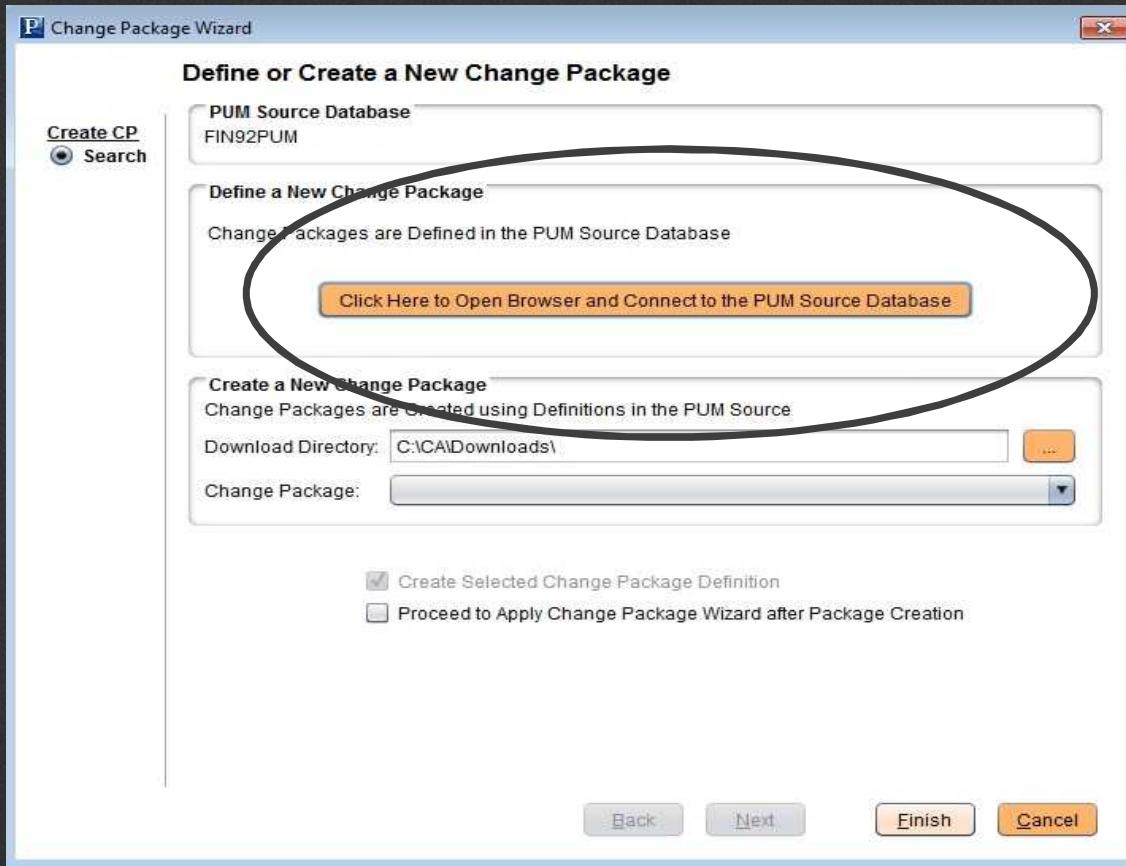
New Package Through CA



New Package Through CA



New Package Through CA



Building a Custom Package



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

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	First 1-4 of 4 Last
<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

Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Lifecycle Tools ▾ > 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
<input type="text"/>	<input type="text"/>

[Find](#) [View All](#) [First](#) [1](#) [2](#) of [3](#) [Last](#)

Look Up Tracking Group [X](#)

Search by: Tracking Group begins with

[Look Up](#) [Cancel](#) [Advanced Lookup](#)

Search Results

View 100 First [1](#) 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 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	
Tax Update (PSFT)		<input type="text"/>

Look Up Value x

Search by: TAG Value begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1 1-7 of 7 Last

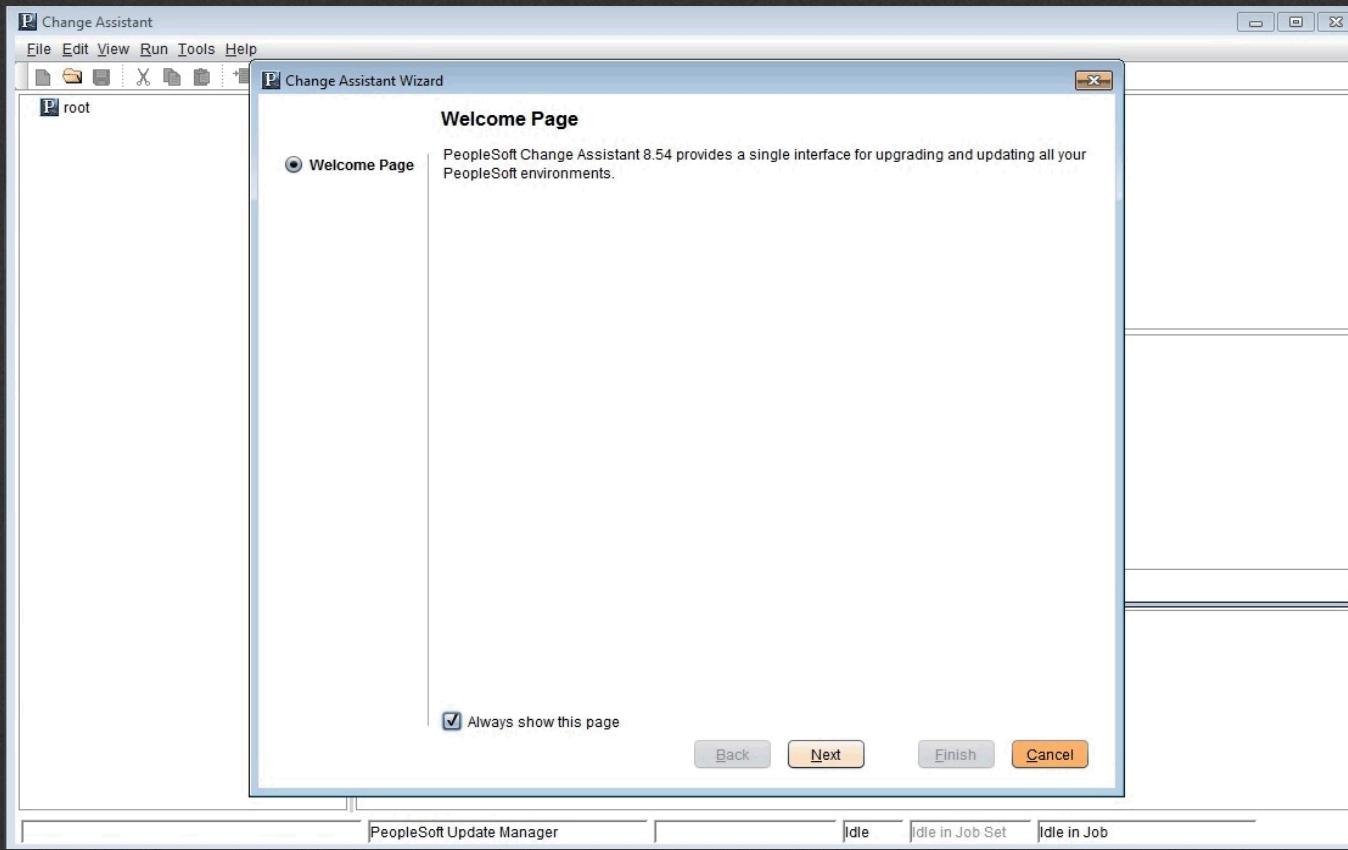
TAG Value
Tax Update 13-A
Tax Update 13-B
Tax Update 13-C
Tax Update 13-D
Tax Update 13-E
Tax Update 13-F
Tax Update 14-A

Package Application

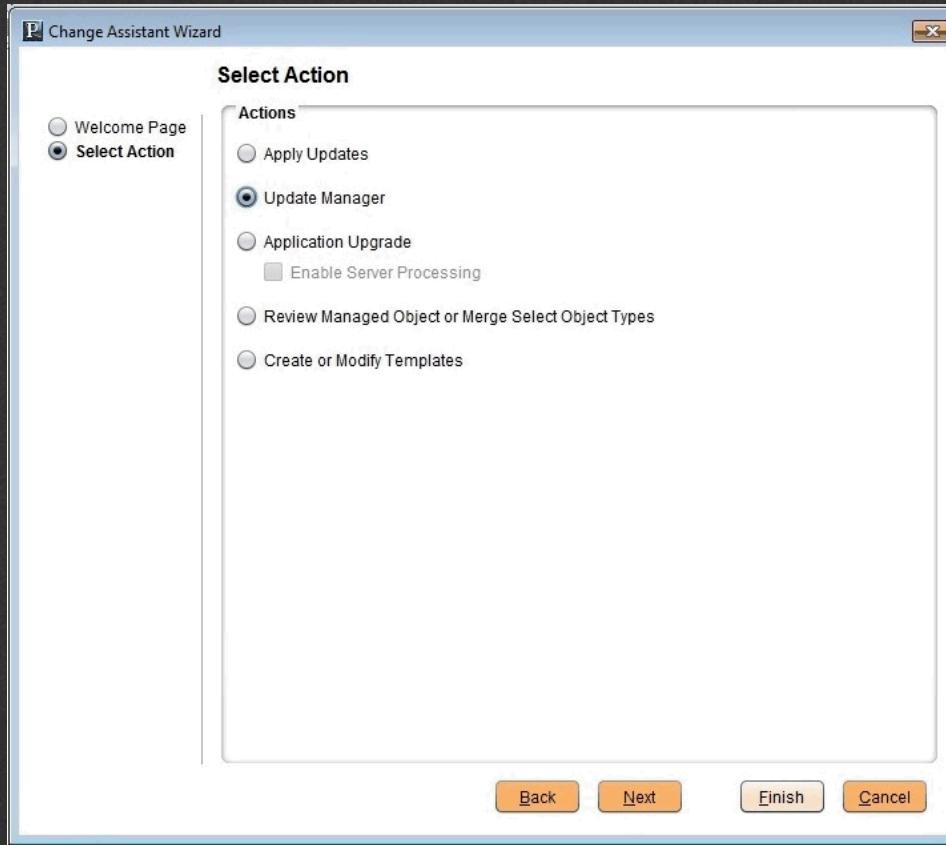
Using CA to apply the PUM package



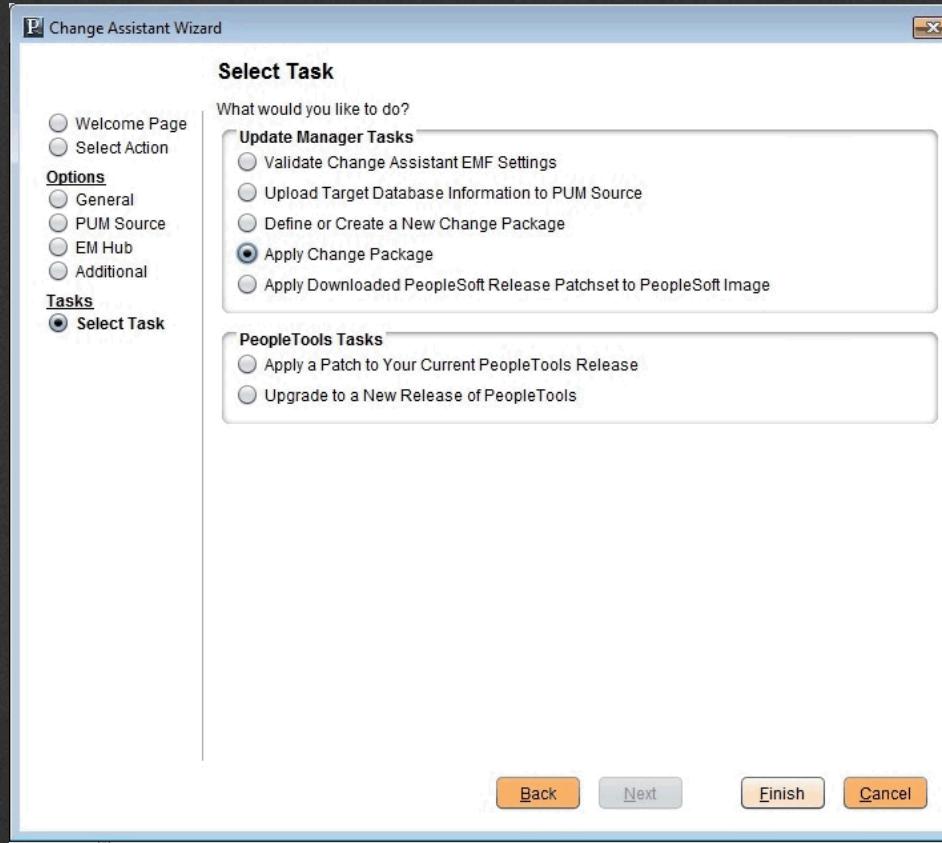
Package Application



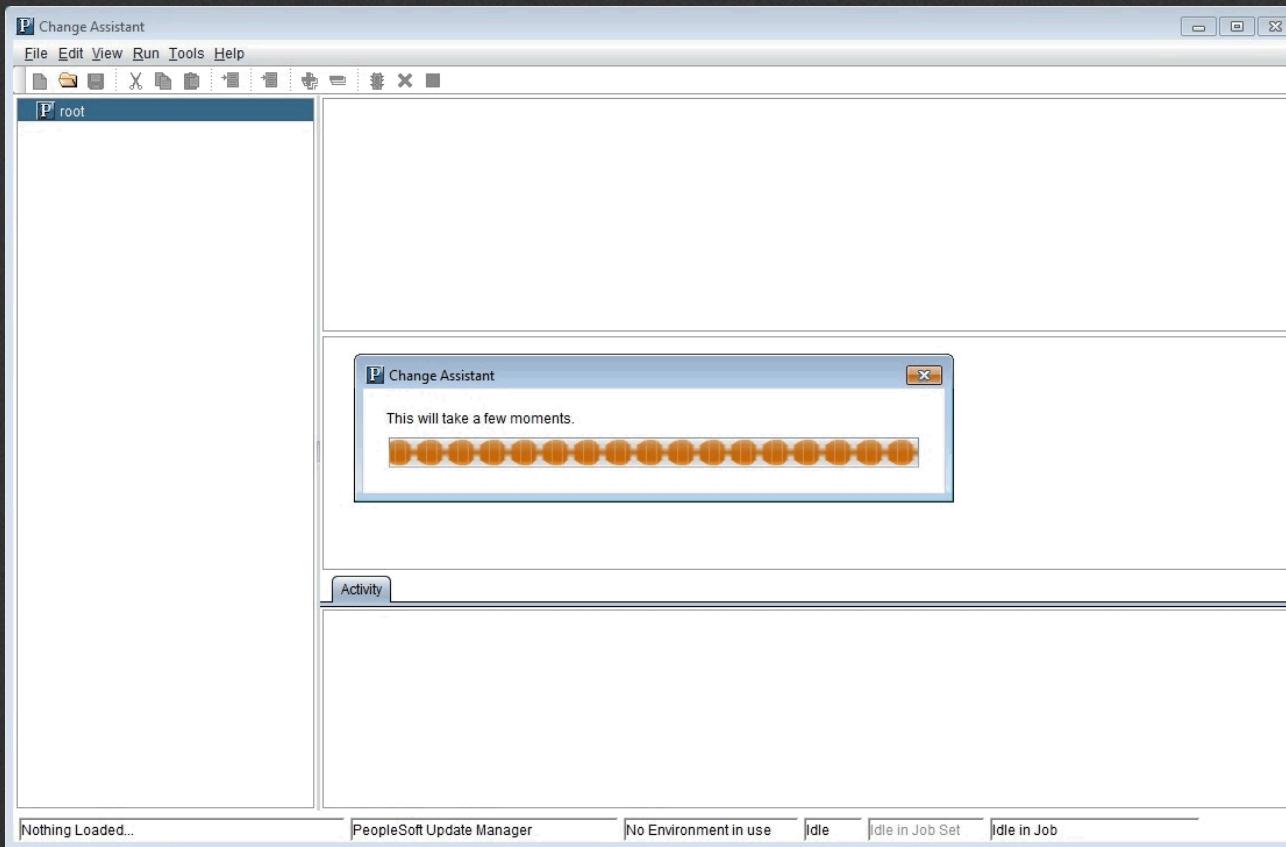
Package Application



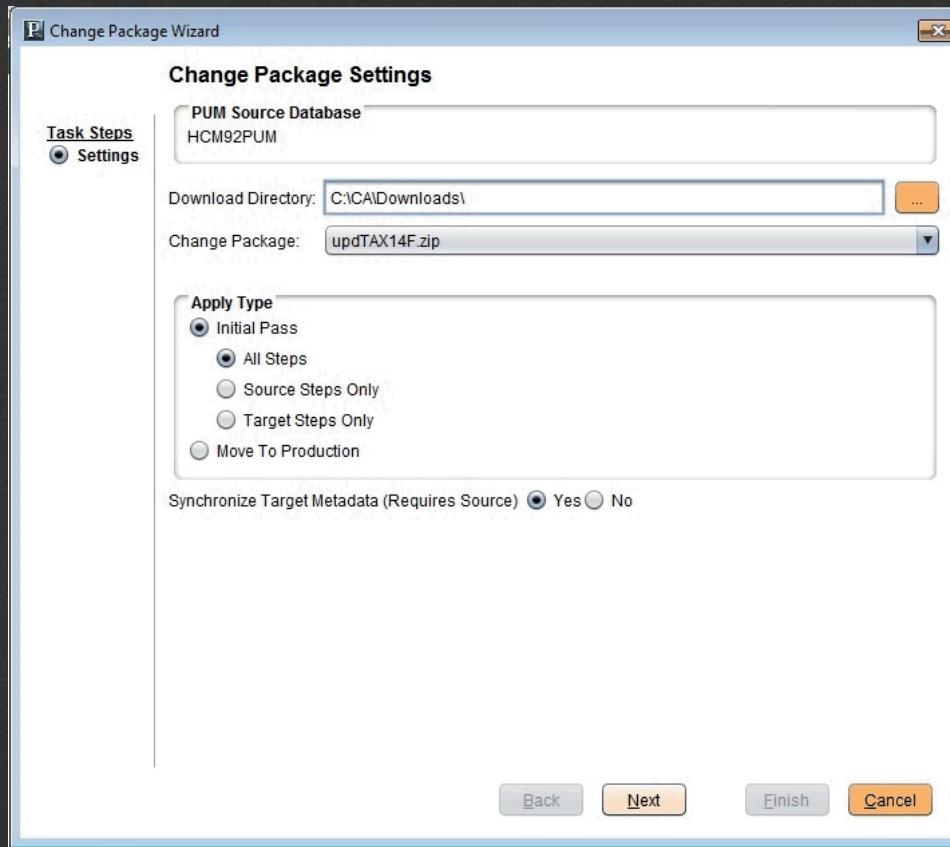
Package Application



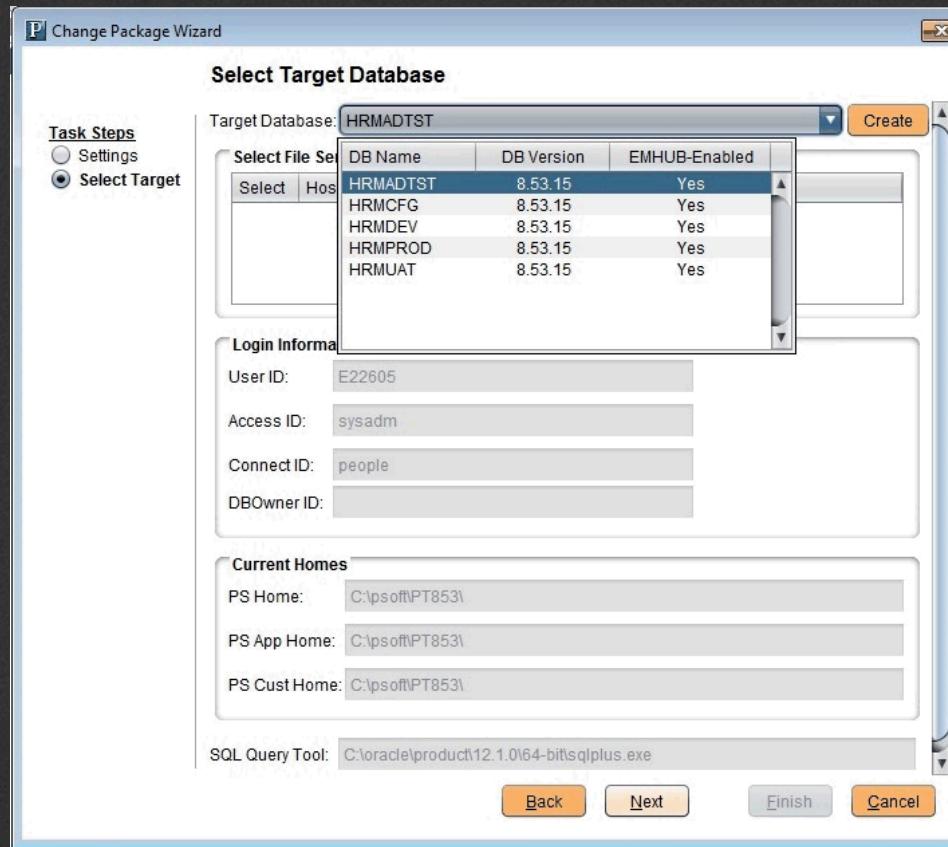
Package Application



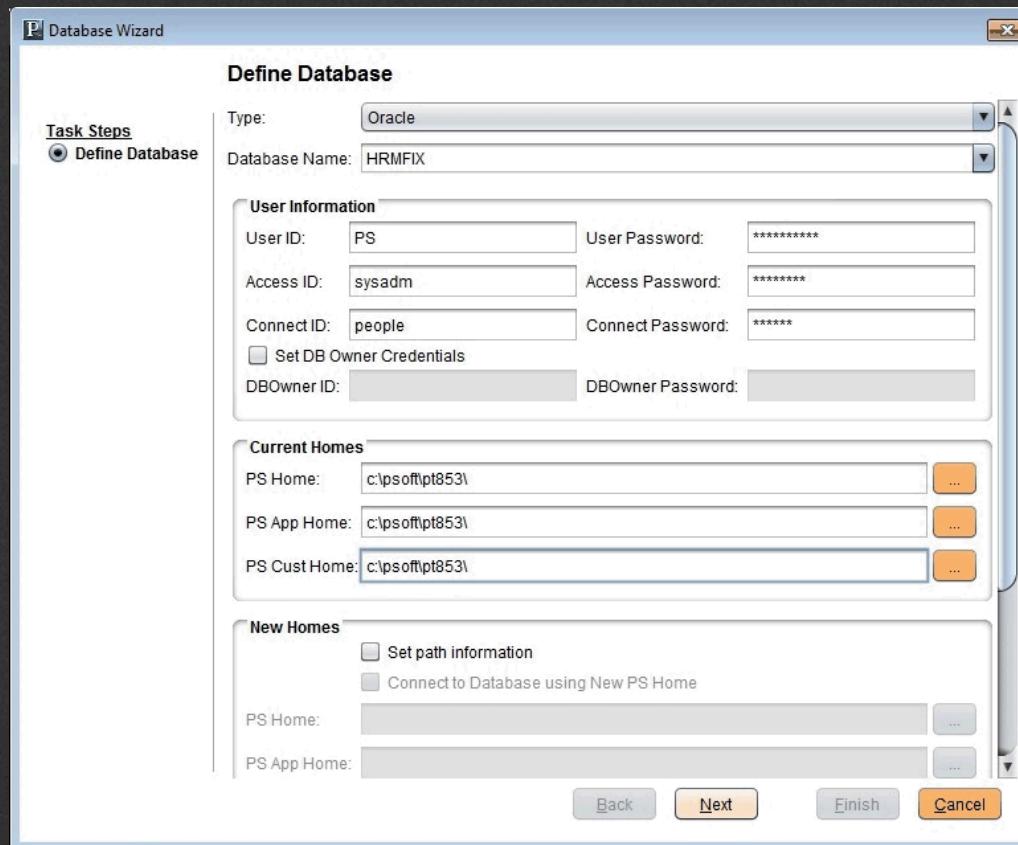
Package Application



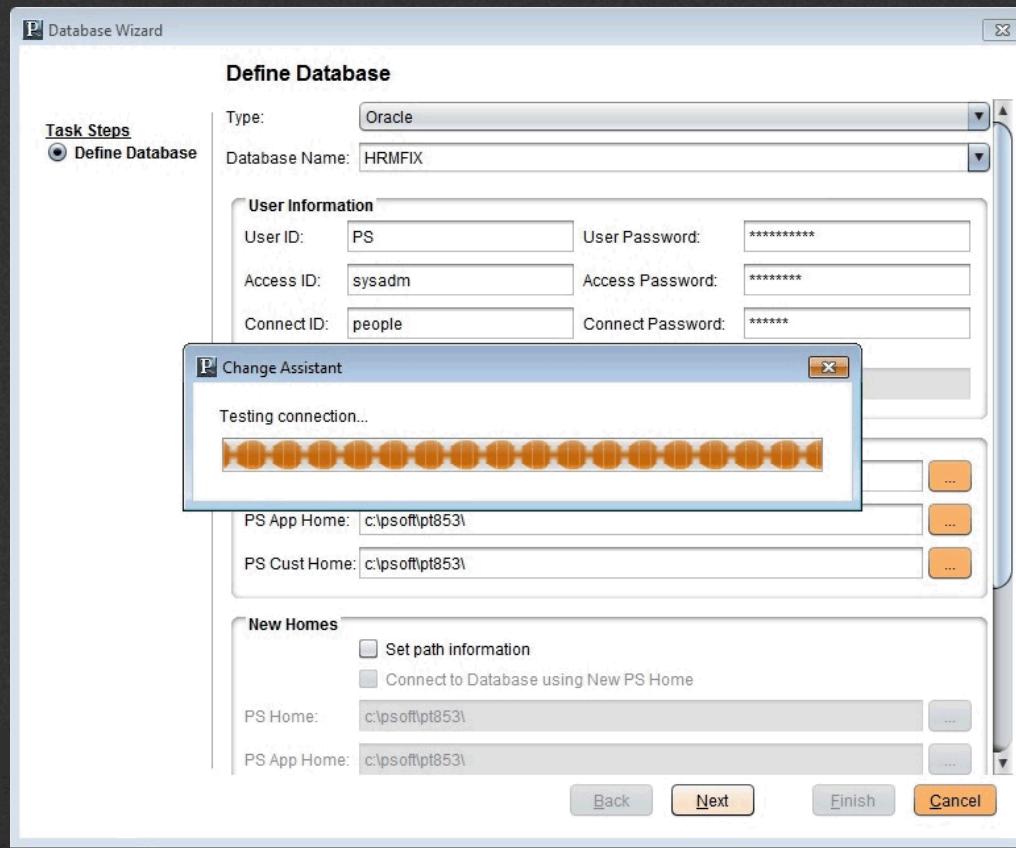
Package Application



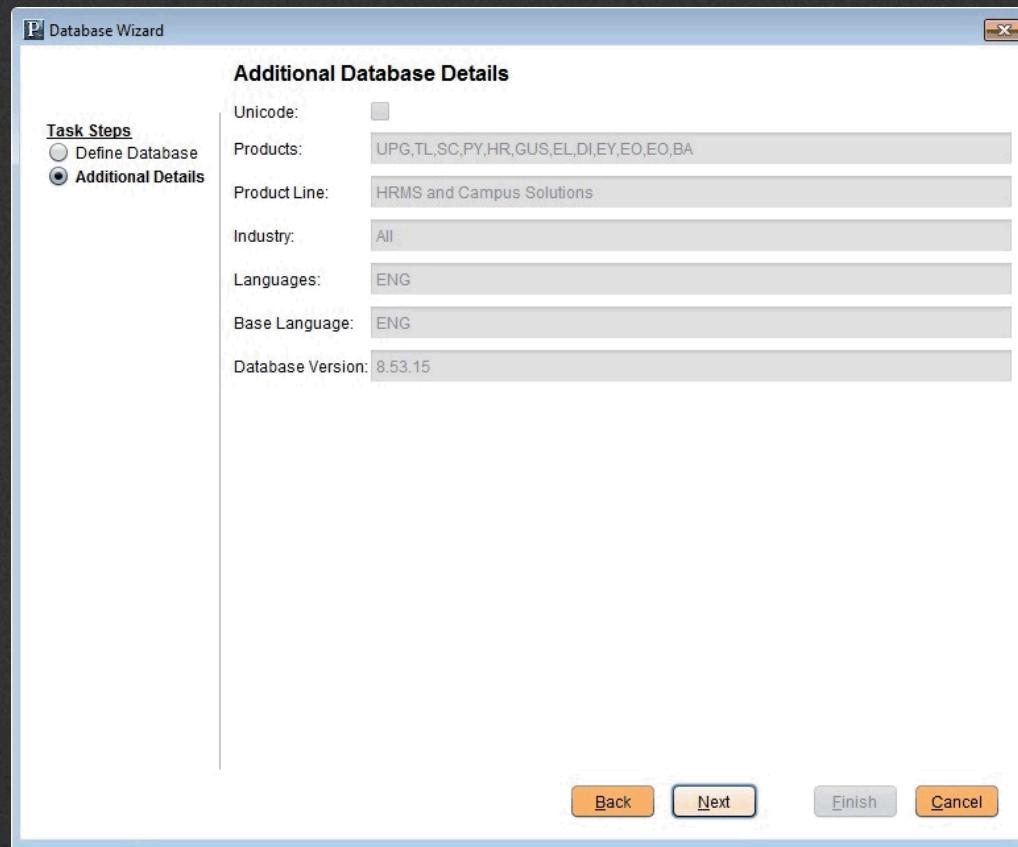
Package Application



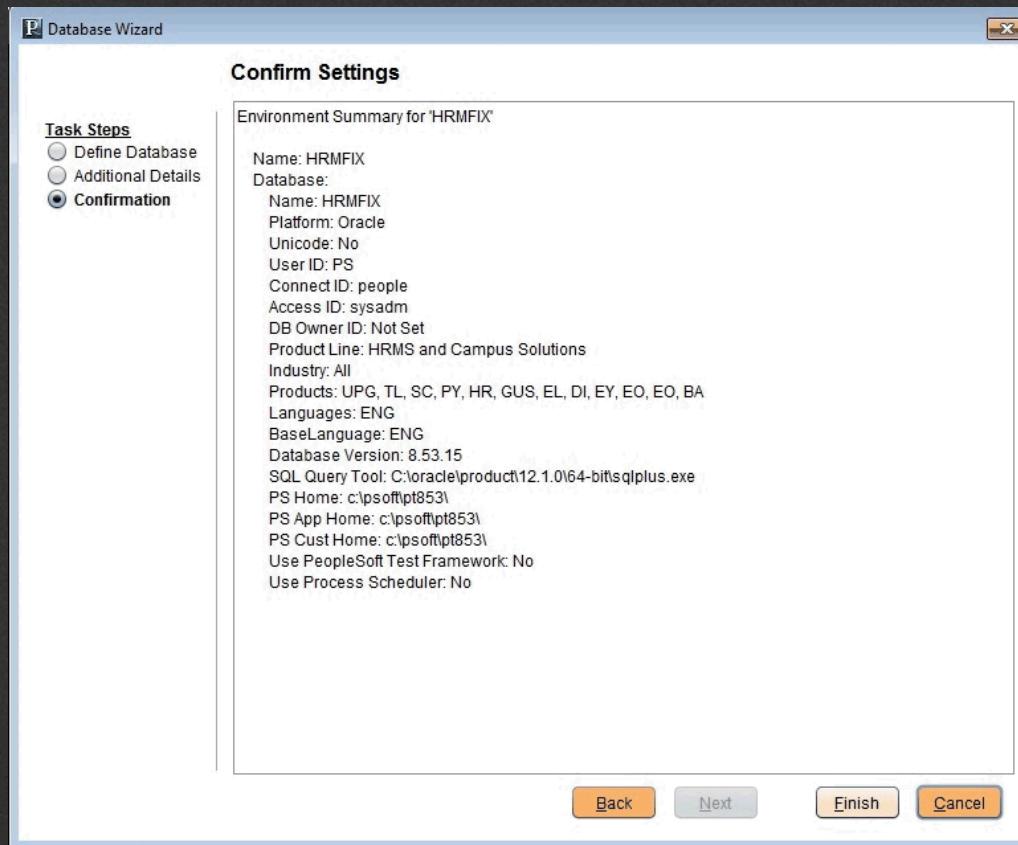
Package Application



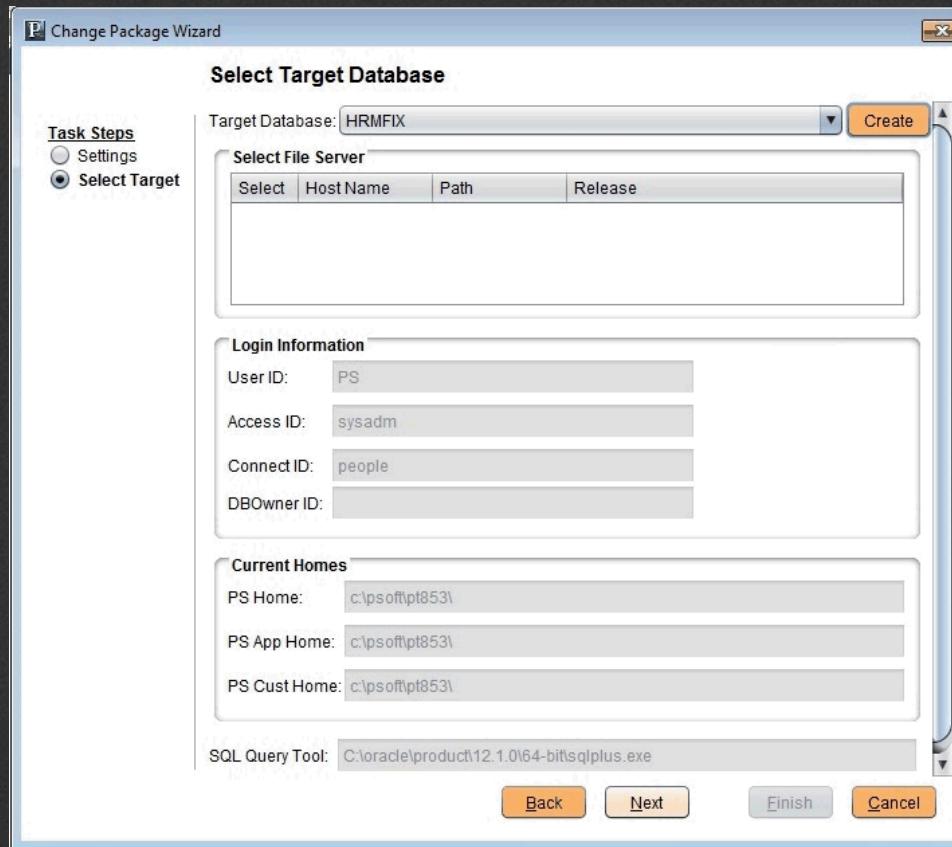
Package Application



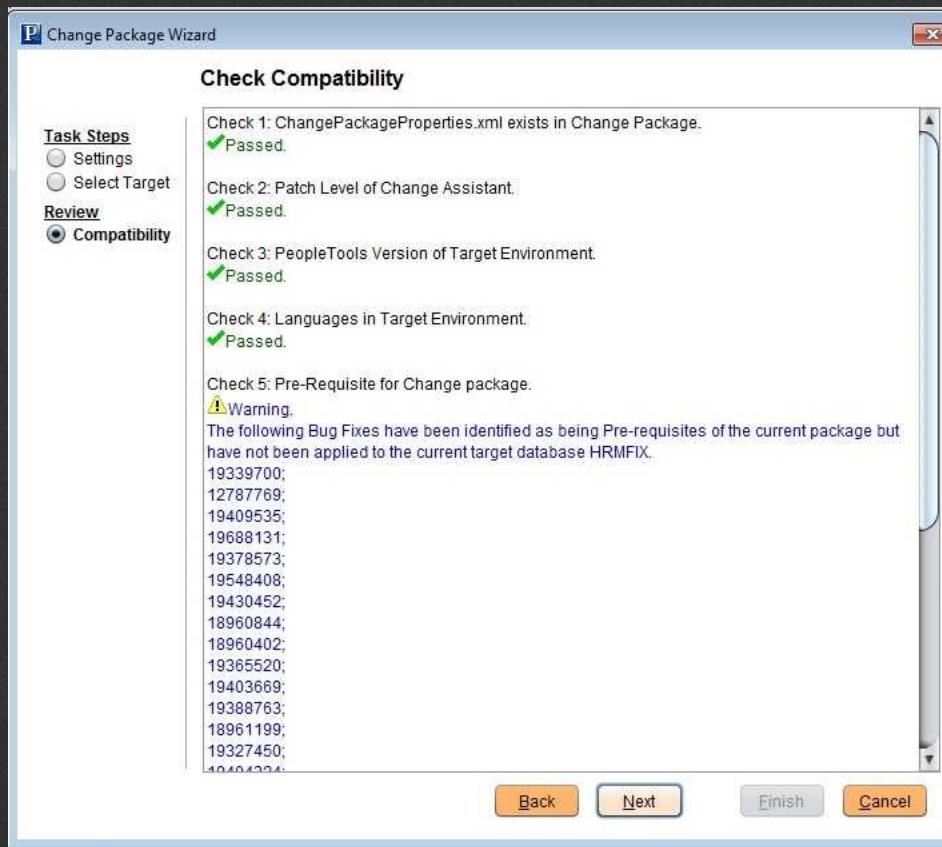
Package Application



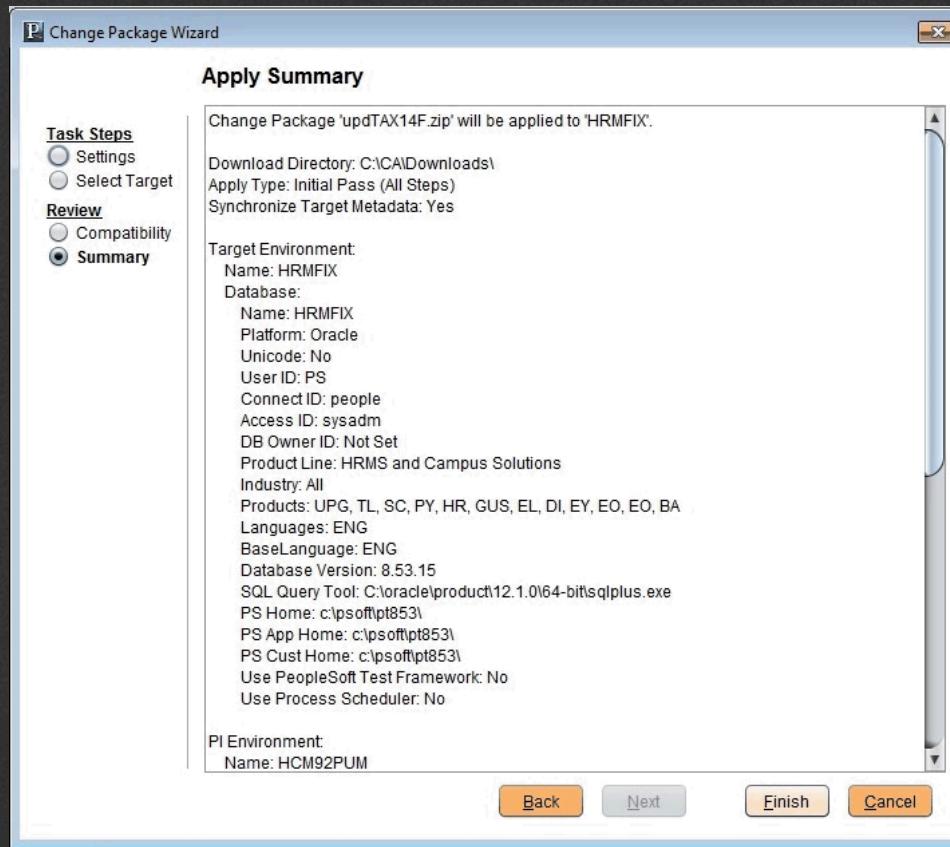
Package Application



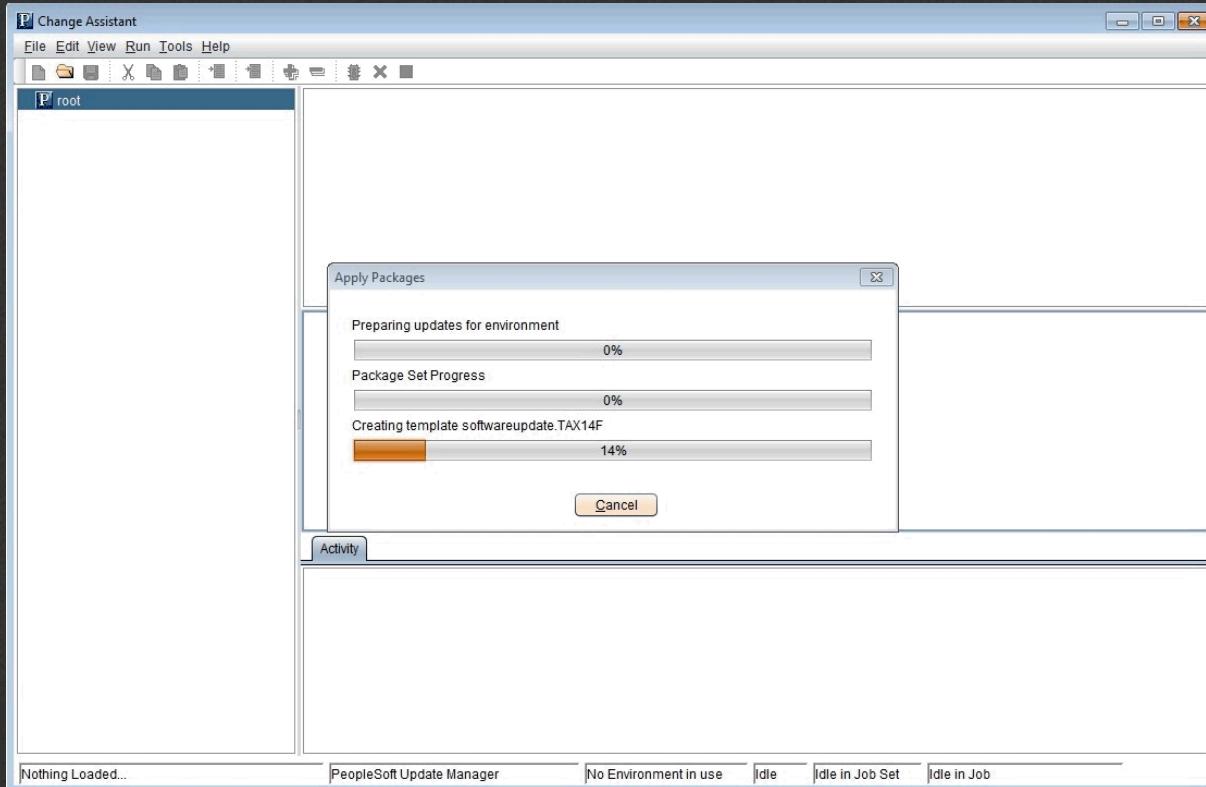
Package Application



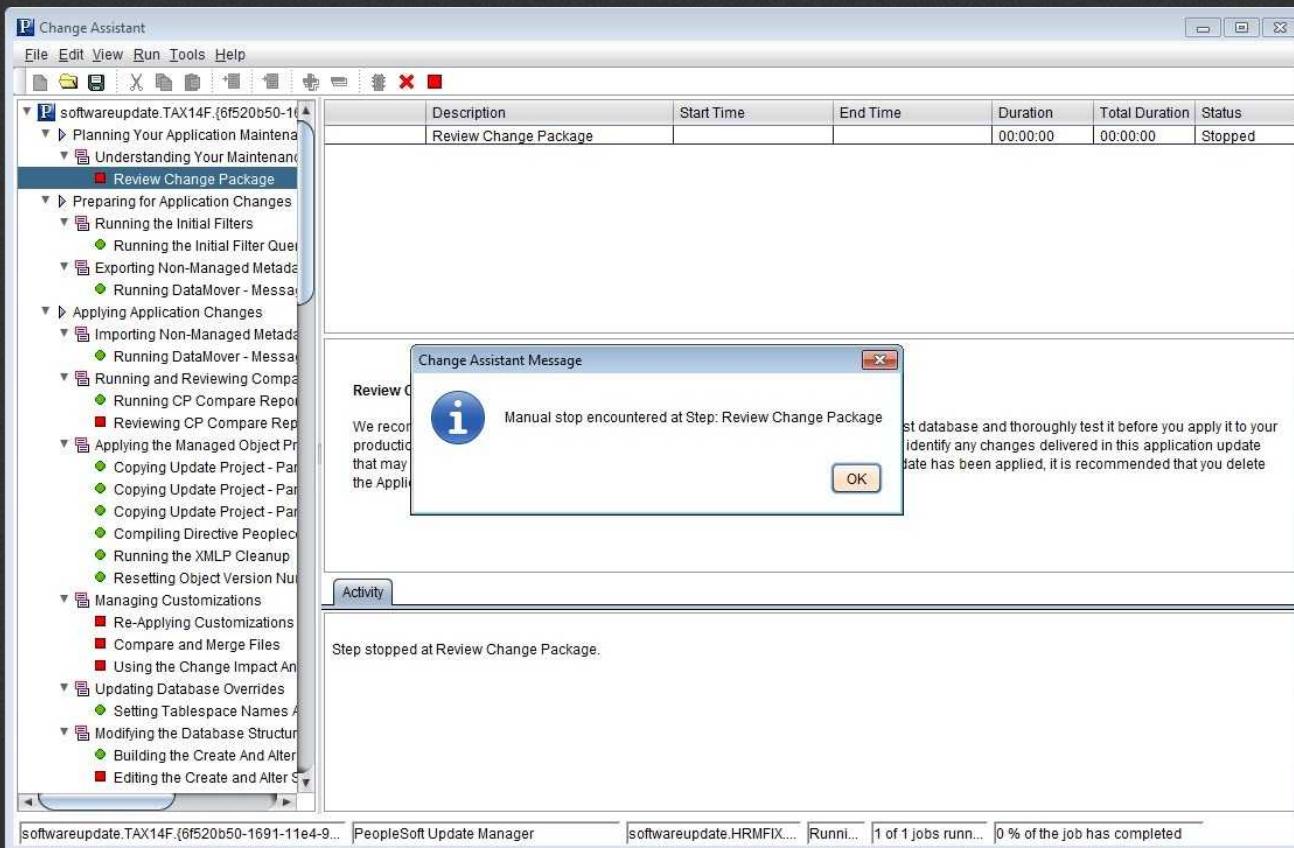
Package Application



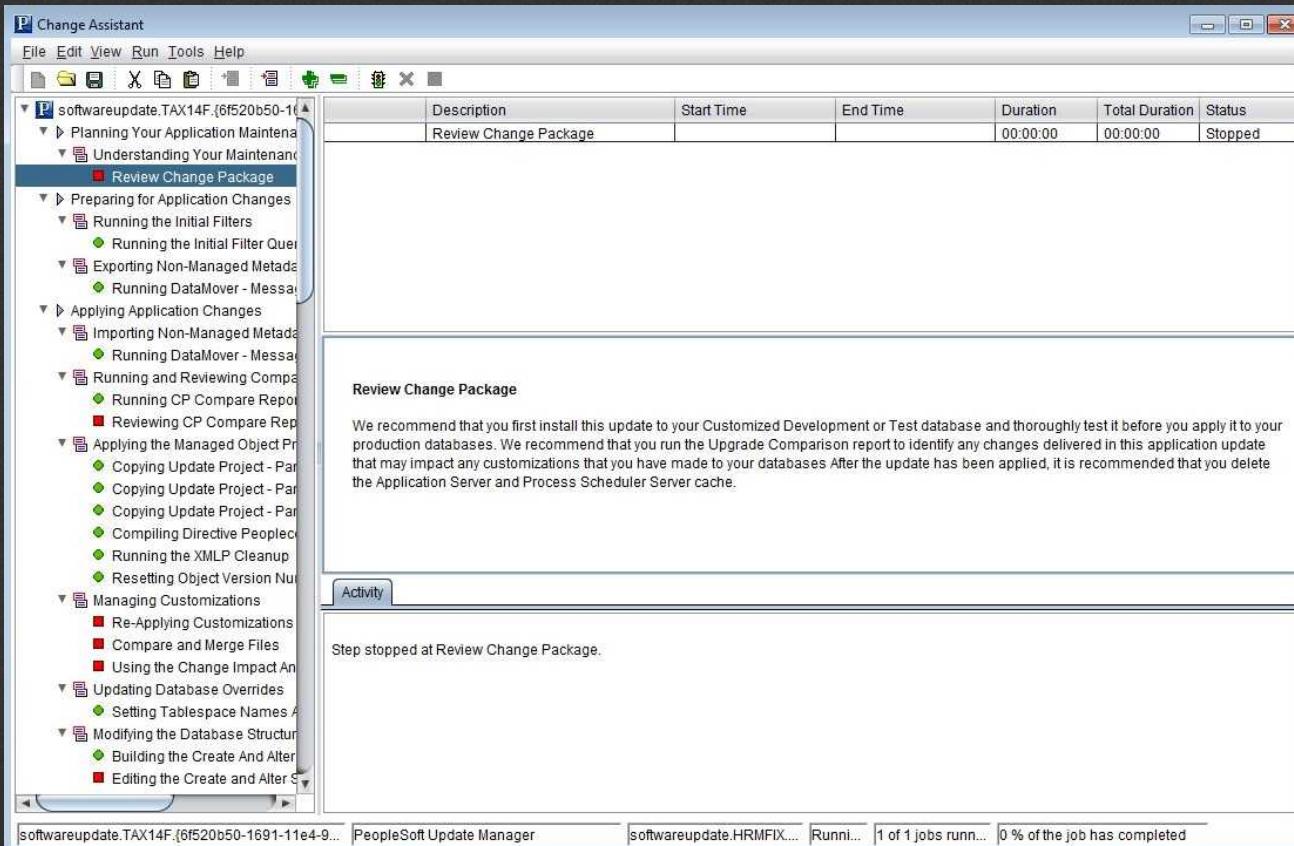
Package Application



Package Application



Package Application



Review Change Package

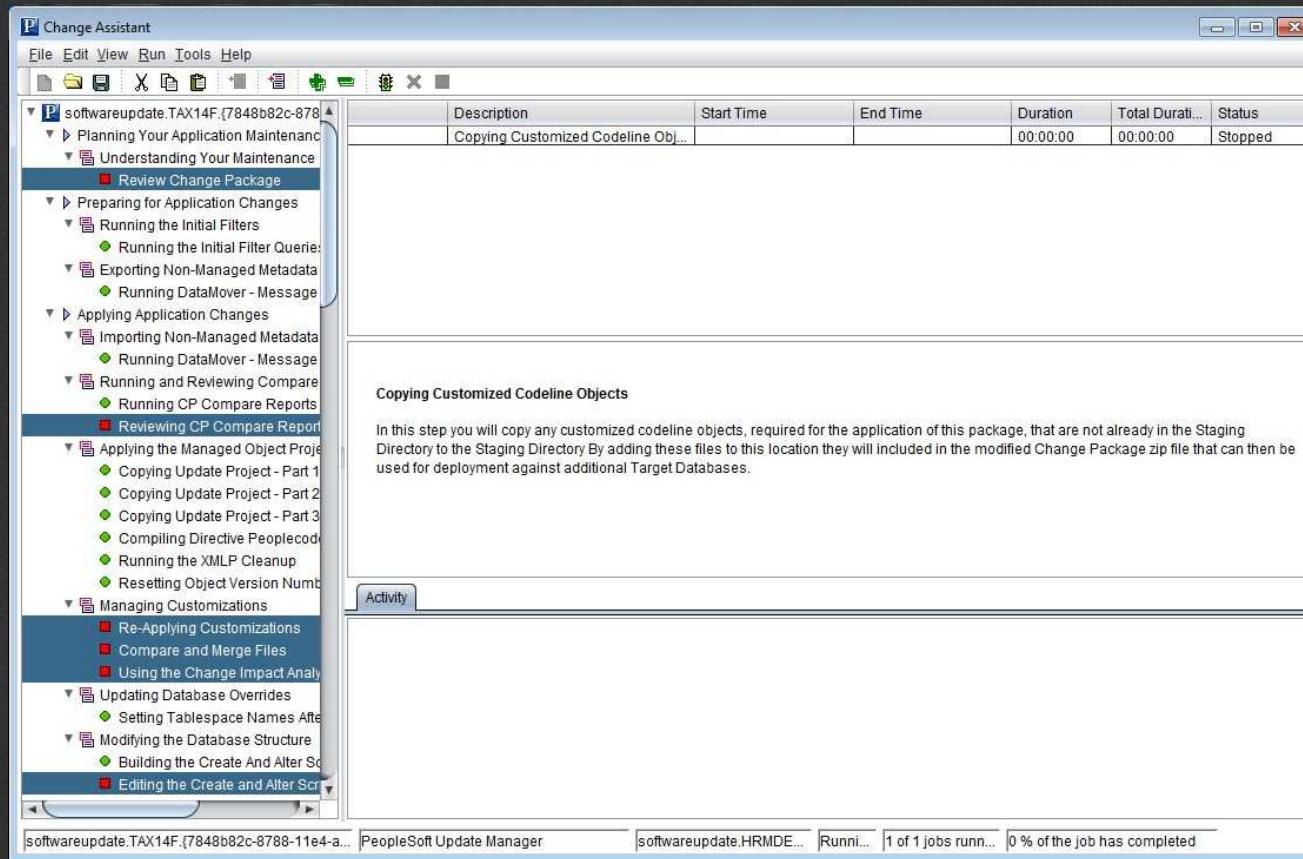
We recommend that you first install this update to your Customized Development or Test database and thoroughly test it before you apply it to your production databases. We recommend that you run the Upgrade Comparison report to identify any changes delivered in this application update that may impact 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

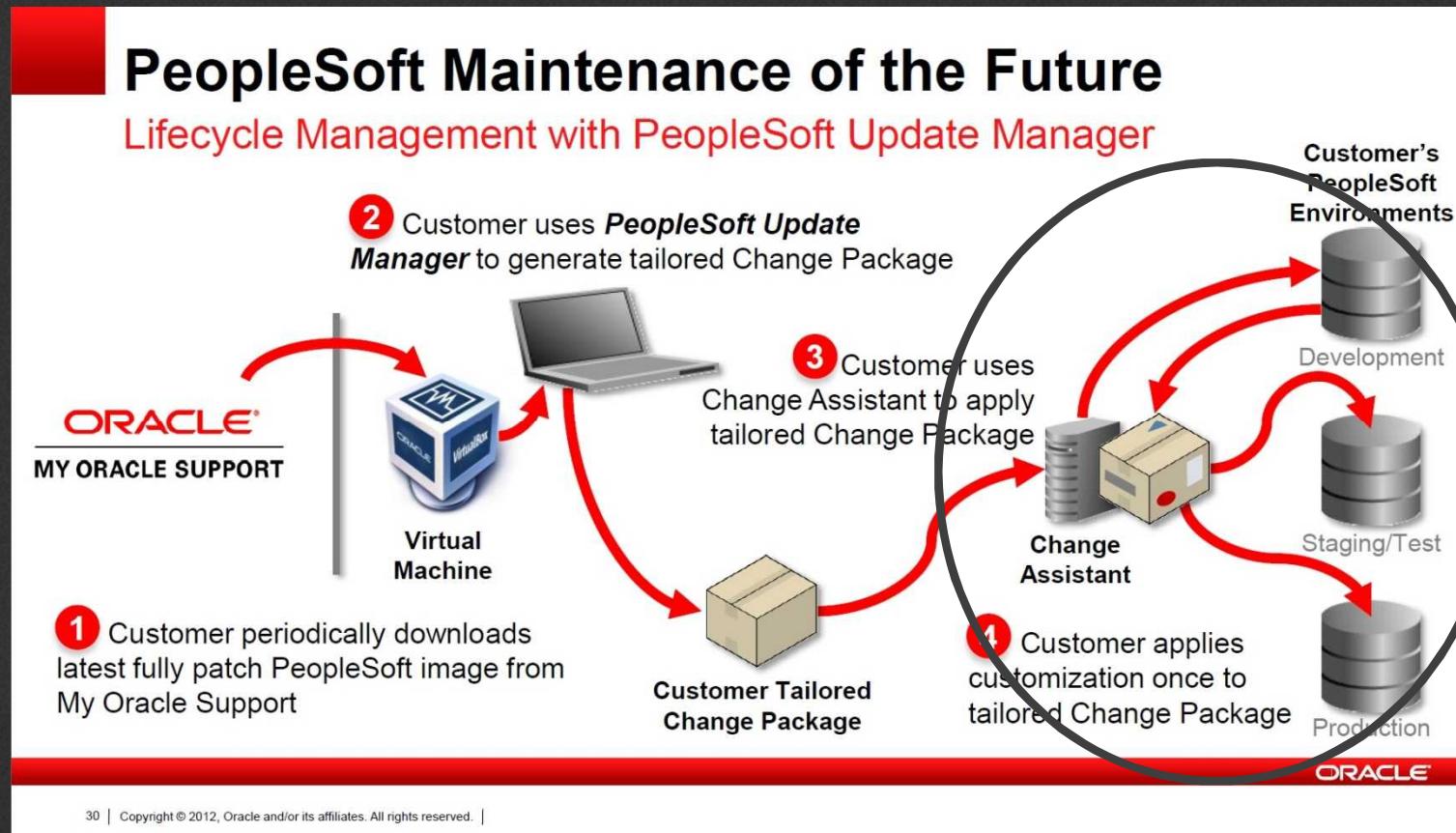
Step stopped at Review Change Package.

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

Skipping Manual Steps *



Additional Environments



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?

 **ALLIANCE**
NASHVILLE **15**

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