



PEOPLESOFT UPDATE IMAGES

HOW CURRENT IS CURRENT ENOUGH?

SESSION 6049

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PRESENTER

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THE UNIVERSITY OF CALGARY

26,200 Undergrad Students

6,100 Grad Students

5,300 Staff

Recognized as one of Canada's Best
Diversity Employers

Named one of top Alberta
Employers for 4th year running

333 Sunny Days - Most in Canada!



FSCM 9.2 PI 26
HCM 9.2 PI 26
ELM 9.2 PI 17
CS 9.2 PI 4
IH 9.1 PI 3 + IntraSee
PeopleTools 8.55
Oracle 12c database
AIX 7.1

8.56 Due in Nov '19
w/ New Linux
Infrastructure

U OF C & ORACLE

We're becoming old timers
– original go-lives began
in 2004. We're now live
with Campus Solutions,
Finance, HCM, ELM and
Integration Hub.

OVERVIEW

1. PeopleSoft Update Management
2. What is Release Planning?
3. Factors to consider
4. Release planning options
5. Our theory
6. Discussion/Questions

PEOPLESOFT UPDATE MANAGEMENT (PUM)

CANADA ALLIANCE 12-14 NOVEMBER 2018

THE THEORY OF PUM



- **PeopleSoft Images**

- Cumulative updates including new features and maintenance fixes
- Delivered frequently on a scheduled basis (HCM: Every 4 months)

- **Selective Adoption**

- No more upgrades (9.3), adoption is **the** option
- Be selective--choose only the updates you want*, when you want them

- **Getting Current**

- Organically, through continuous adoption
- Strategically, through selective adoption and “catch-up” projects

ORACLE — MAINTENANCE STRATEGIES

- **Proactive**

- Leading Edge: Applying maintenance as it becomes available

- **Selective**

- Regularly adopt only the features that are relevant to you

- **Reactive**

- Maintenance on demand, only when you REALLY need it



ORACLE — APPLICATION UPDATE RECOMMENDATION

■ Immediate

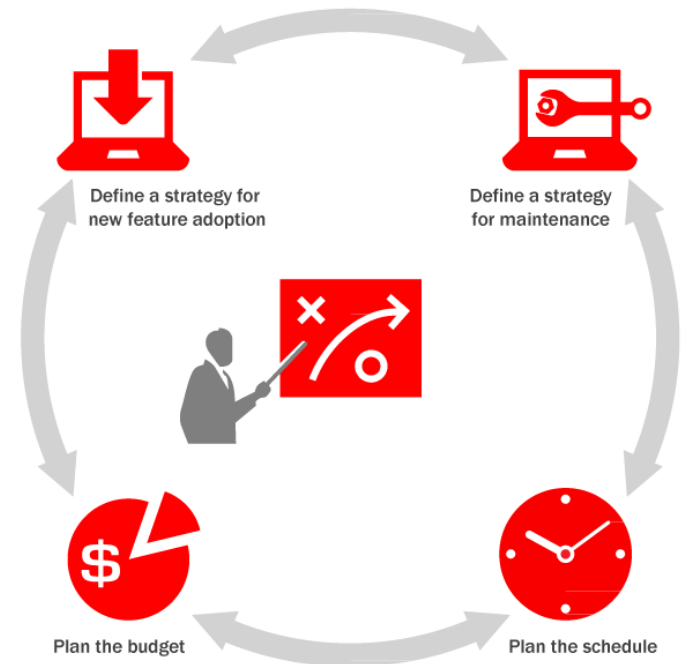
- Apply critical (P1) tax, regulatory, and security updates

■ Regular

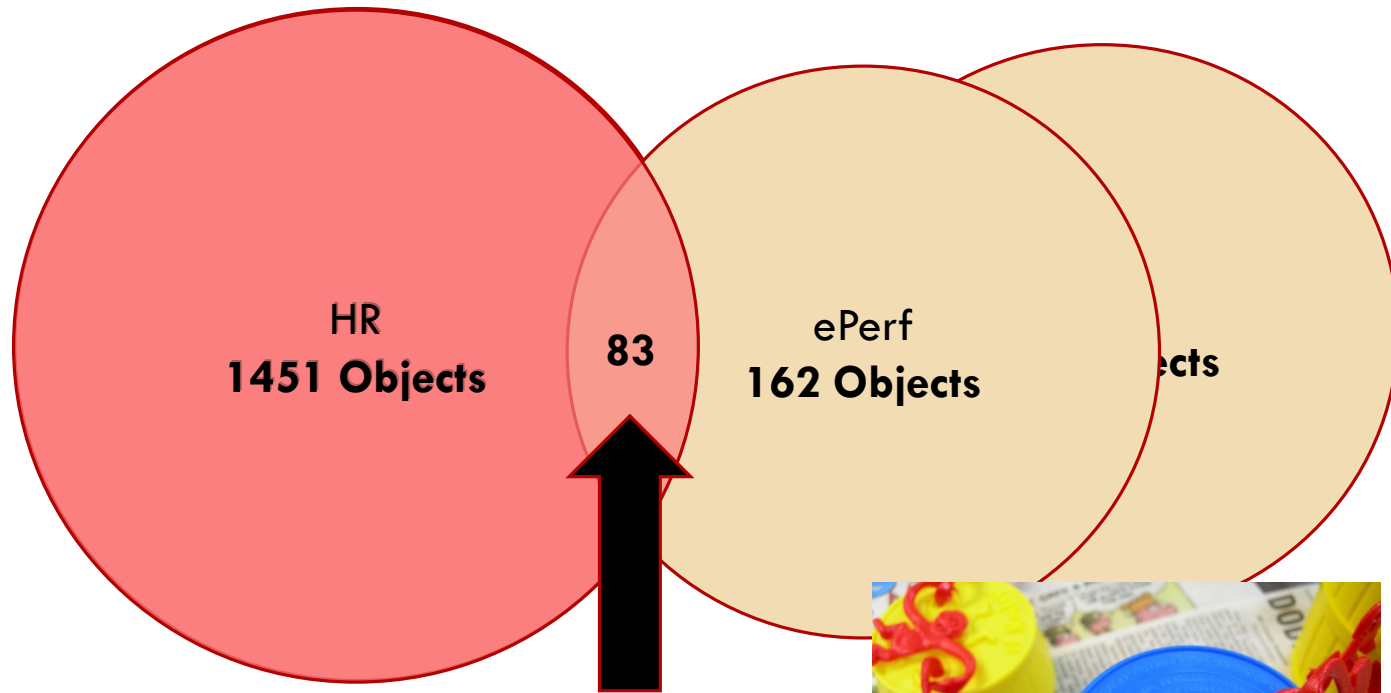
- Apply scheduled, low-cost, high impact features and fixes.

■ 12-16 months

- Update your products to current maintenance levels and take advantage of all the latest new features



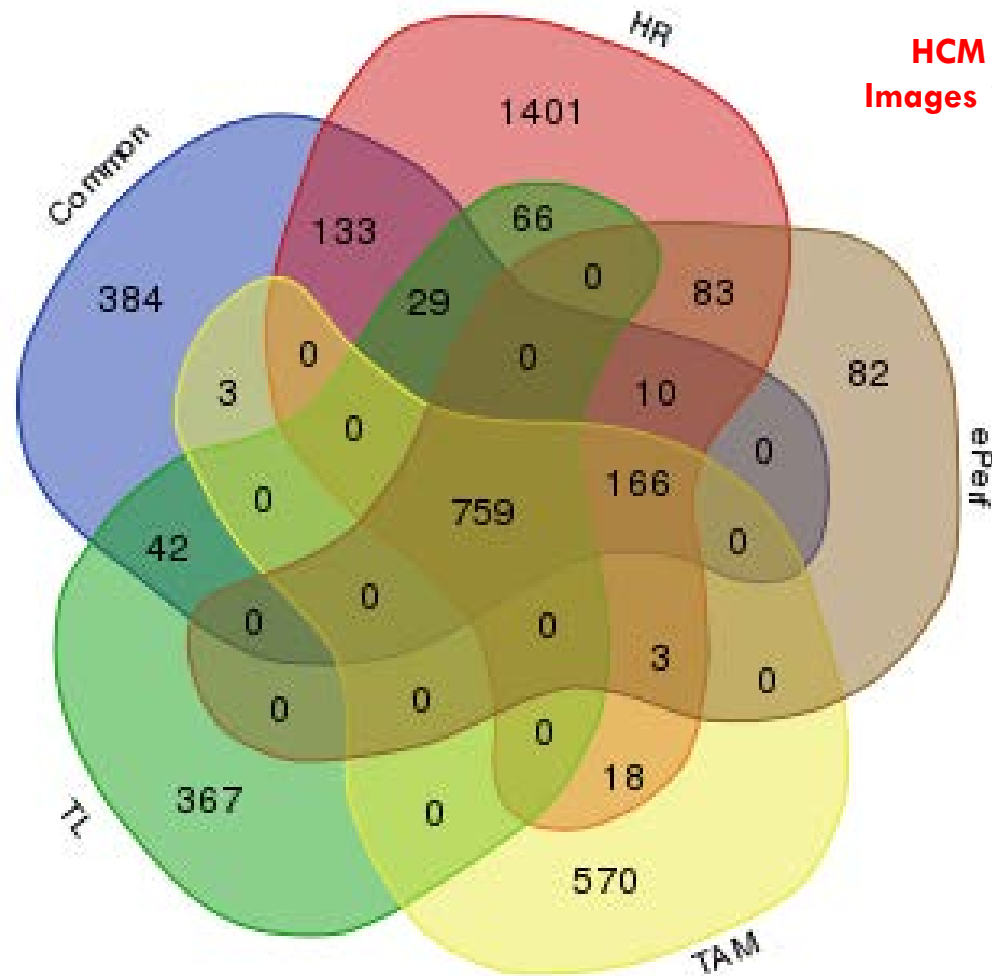
VISUALIZING PUM'S



Barrel of Monkeys



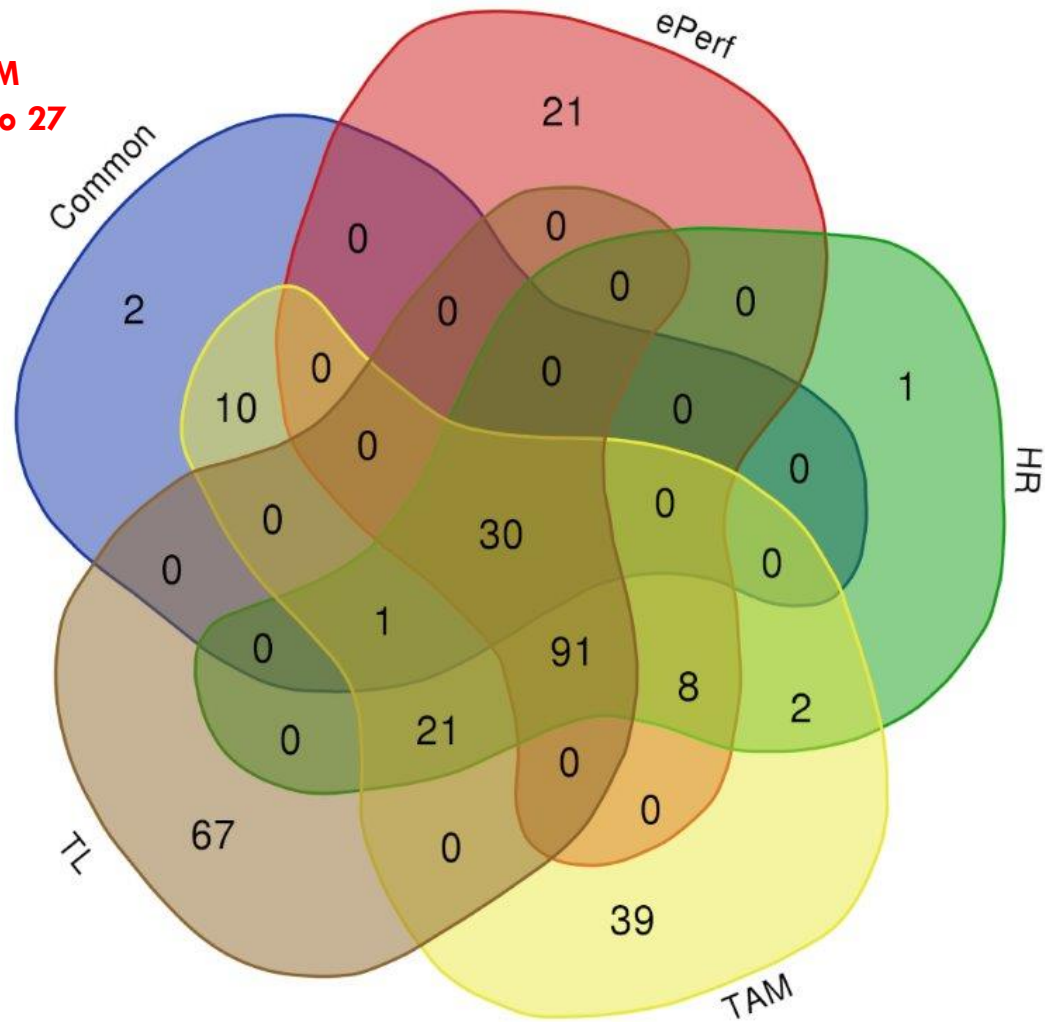
VISUALIZING PUM'S



HCM PUM
Images 14 to 23

VISUALIZING PUM'S

HCM PUM
Images 26 to 27



RELEASE PLANNING

RELEASE PLANNING

- **What is release planning?**

- *A strategy to meet business needs through a balance of priority initiatives, resource planning and future-enabling maintenance*

RESOURCES

VALUE



TIME

RESOURCES

- Environments
- Shared services
- Funding
- Cross-functional considerations
- Change Management
- Business/Testing



TIME

- Frequency
- Competing projects in-flight
- Migration/Change windows
- Maintenance schedules
 - Database/Security Patches
 - Infrastructure
 - PeopleTools



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QUESTIONS THAT NEED ANSWERS

- Multiple Applications (HCM/CS/FSCM):
 - Can it be the same or different for each?
- How much to update at a time:
 - Selective or Kitchen sink?
- Fluid:
 - When to make the jump?
 - Jumping together?



RELEASE PLANNING OPTIONS

PROACTIVE: ALWAYS CURRENT

- Fully supported
- Real-time availability of new features
- Fewer prerequisites challenges
- “Treadmill” approach: Update Fatigue
- Value for effort?
- Is it sustainable?



SELECTIVE: PICK AND CHOOSE

- Control over scope
- Select for value
- Relatively current
- Dreaded prerequisites
- Eventual catchup required



REACTIVE: BIG BANG THEORY

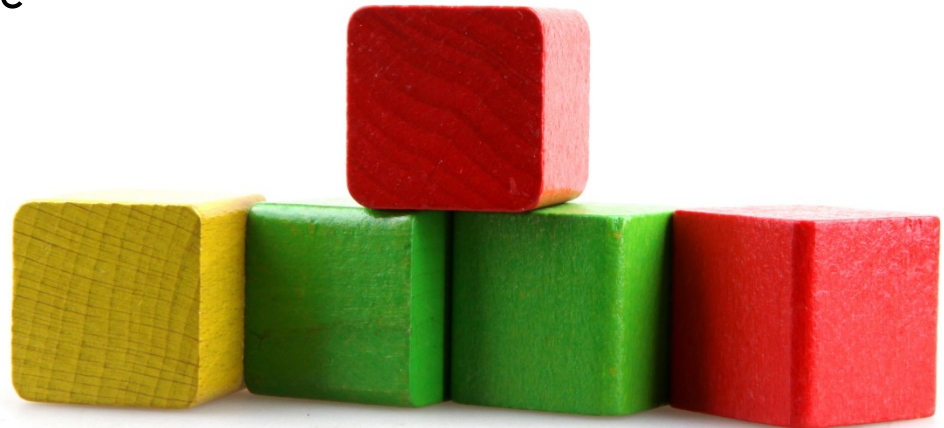
- Everything all at once
- Can plan for long term
- End to end testing cycle
- Costly
- Could be unsupported
- No Selective Adoption advantage
- Big “P” project



UCALGARY RELEASE PLAN

IDEALS: LAYING THE FOUNDATION

- Success would be:
 - Remaining reasonably current
 - Keep it manageable
 - Institutionalizing the PUM process
 - Demonstrating a tangible value to the business
 - Leveraging the release cycle



REASONABLY CURRENT

- Taking advantage of selective adoption to move forward continually
- Implementing critical updates in a timely manner
- Providing value to the business with new functionality
- Maintaining Oracle Support level
- Providing the springboard for new functionality



KEEPING IT MANAGEABLE

- Ensuring that the process is not organizationally taxing
- Does not detract from implementing other priorities
- Fitting within the existing framework and commitments
- Finding efficiencies in the process



INSTITUTIONALIZING THE PROCESS

- Ensuring the process can be standardized for repetition
- Transparency for business owners will allow them to plan ahead
- Building a solution that works for each application's stakeholders
- Operationalizing the maintenance – no project required



DEMONSTRATING VALUE

- More visibility for Business Owners into new features and enhancements
- Quicker implementation of new features, enhancements, and fixes
- Can reduce risk to existing customizations during updates
- Can be selective to manage amount of end user change



LEVERAGING THE RELEASES



Using release planning to find efficiencies

- Accomplish more with less
- Enable a cross-training strategy
- Make testing cycles less onerous

Finding ways to increase the value proposition

- Make maintenance more palatable outside of what images provide

THE PLAN



- 3 releases per year, lasting 4 months in duration
- Releases will be limited to 1-2 modules (selectively adopted)
- “Catch-up” release occurs with PeopleTools update (~24+ months)
- Analysts/Developer will be dedicated to the release work
- Sustainment work will be shared across the rest of the team
- Existing break/fix and enhancement requests for those modules are included

SOMETHING FOR EVERYONE

For our business owners

- Supplementing the images with significant priority work
- Allows them to plan for resources when required
- They can focus on business activities in between their releases

For HCM Team

- Dedicated time to tackle the larger projects
- Staying current while working on priorities
- Testing efficiencies
- Cross-training opportunity



FIRST RELEASE



Payroll and ELM targeted modules

■ **Payroll**

- Major value for Payroll was a long-awaited customization
- In addition, 15 enhancement requests were completed

■ **ELM**

- Found value in new functionality in the PUM's
- A dozen enhancements were included as well

LESSONS LEARNED

- Pre-requisites and unwanted tag-alongs
 - Building change package requires understanding connections
 - Being selective is necessary to avoid scope creep
- Resources for sustainment work not underestimated
- Migration learning curves can be expected
- Victim of its own success: “It’s my turn now”

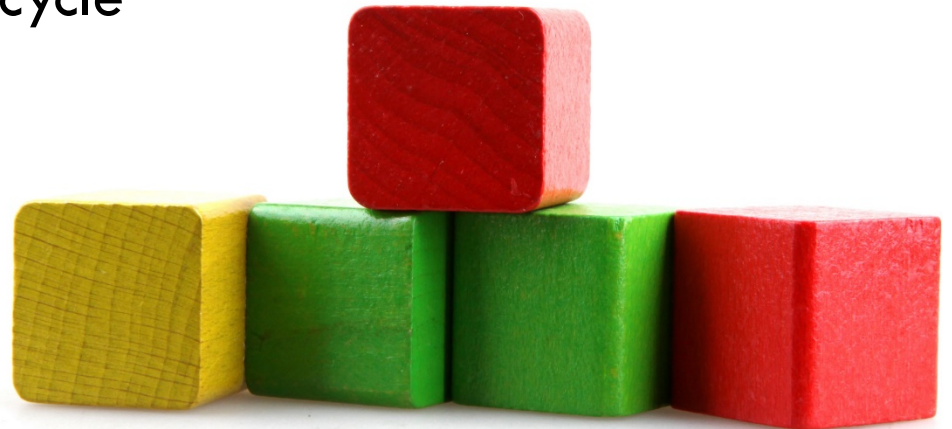


CONCLUDING THOUGHTS

ANY QUESTIONS?

IDEALS: REVISITED

- **Success has been:**
 - Remaining reasonably current
 - Keep it manageable
 - Institutionalizing the PUM process
 - Demonstrating a tangible value to the business
 - Leveraging the release cycle



SUMMARY





THANK YOU!



PRESENTER

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DOWNLOAD FROM THE CONFERENCE SITE**