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In This Session

State of Selective Adoption

What's new in 8.57

How does PeopleSoft Cloud Manager fit in?

Quantify the Benefit of Cloud Manager

Where do we go from here?

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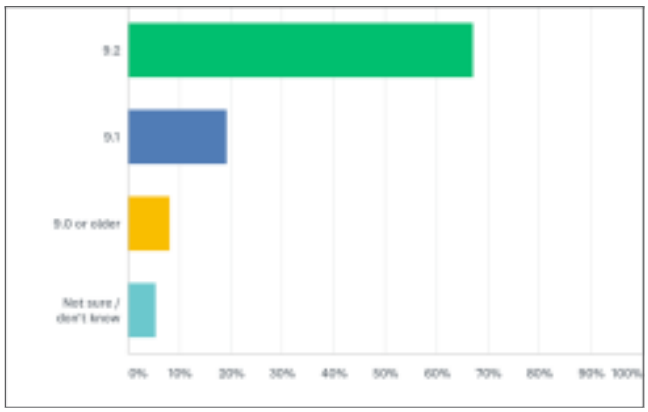
Which version of PeopleSoft are you on?



- 2/3 of surveyed are currently on 9.2 applications
- About 60% of those not on 9.2 are planning to upgrade to 9.2.

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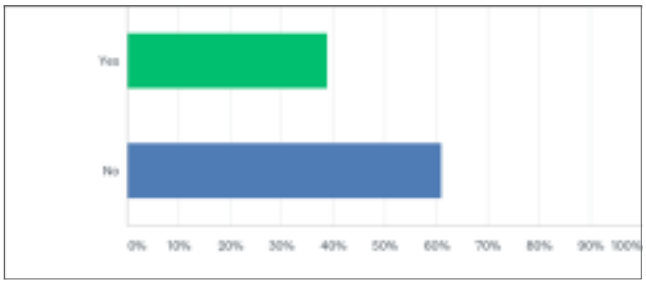
Do you have a Selective Adoption Strategy?



- Numbers are misleading since pre-9.2 customers answered.
- Best estimate is about 60% say they have a Selective Adoption Strategy

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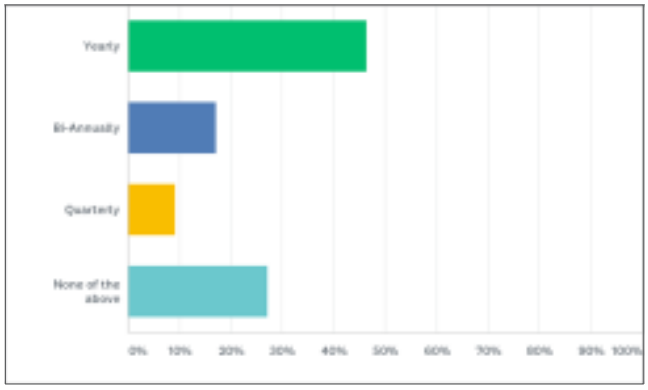
How often is your organization staying current?



- Almost half (46%) are staying current on an annual basis
- Roughly 26% are staying current more often
- Roughly 27% are not staying current

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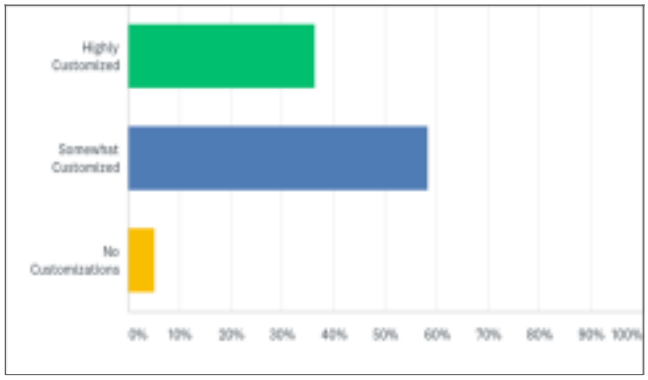
Which of the following best describes your level of customization?



- About 35% are very heavily customized
- Just under 60% are somewhat customized
- 5% have little or no customizations

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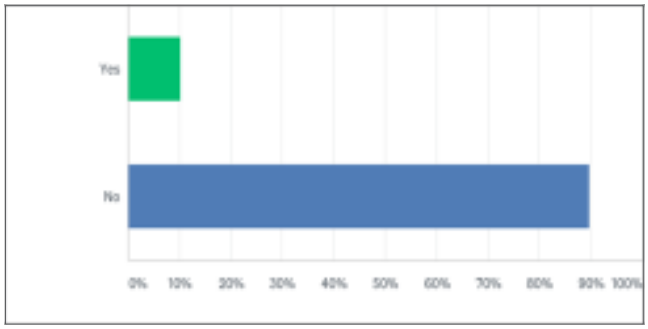
Do you use an automated regression testing tool to test PeopleSoft?



- Extremely low level of Regression Testing
- Cost prohibitive to create regression tests
- Difficulty to build, maintain and run
- Only 10% are regression testing with a tool

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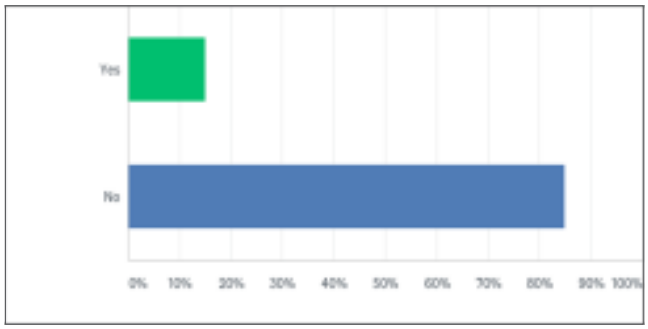
Has your organization changed the responsibilities for staff (either business or IT) as a result of employing a selective adoption strategy?



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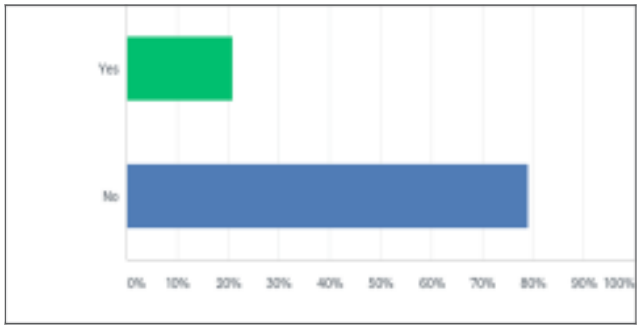
Has your organization been able to demonstrate a return on investment from employing a selective adoption strategy?



- Only 20% of those using Selective Adoption believe they have seen a return on investment

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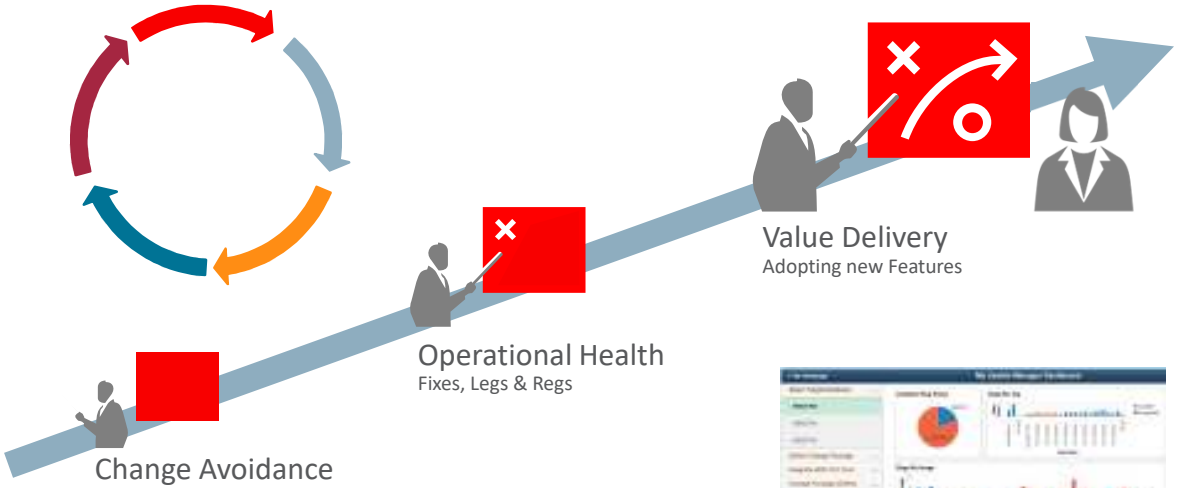
The State of Selective Adoption



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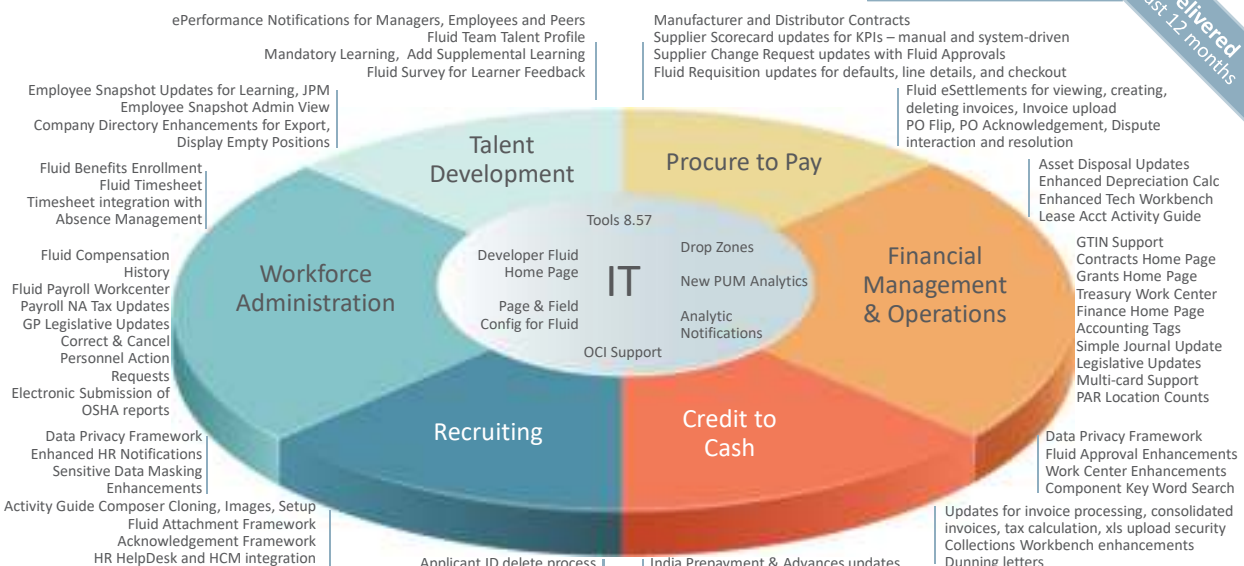
Not comprehensive, see full list at www.peoplesoftcfotool.com

Delivered Last 12 months



ePerformance Notifications for Managers, Employees and Peers
Fluid Team Talent Profile
Mandatory Learning, Add Supplemental Learning
Fluid Survey for Learner Feedback

Employee Snapshot Updates for Learning, JPM
Employee Snapshot Admin View
Company Directory Enhancements for Export, Display Empty Positions

Fluid Benefits Enrollment
Fluid Timesheet
Timesheet integration with Absence Management

Fluid Compensation History
Fluid Payroll Workcenter
Payroll NA Tax Updates
GP Legislative Updates
Correct & Cancel Personnel Action Requests
Electronic Submission of OSHA reports

Data Privacy Framework
Enhanced HR Notifications
Sensitive Data Masking Enhancements

Activity Guide Composer Cloning, Images, Setup
Fluid Attachment Framework
Acknowledgement Framework
HR HelpDesk and HCM integration

Applicant ID delete process
Fluid Homepage for Recruiters, Managers and Admins
Recruiting Analytics
Candidate Application Status

Manufacturer and Distributor Contracts
Supplier Scorecard updates for KPIs – manual and system-driven
Supplier Change Request updates with Fluid Approvals
Fluid Requisition updates for defaults, line details, and checkout

Fluid eSettlements for viewing, creating, deleting invoices, Invoice upload
PO Flip, PO Acknowledgement, Dispute interaction and resolution

Asset Disposal Updates
Enhanced Depreciation Calc
Enhanced Tech Workbench
Lease Acct Activity Guide

GTIN Support
Contracts Home Page
Grants Home Page
Treasury Work Center
Finance Home Page
Accounting Tags
Simple Journal Update
Legislative Updates
Multi-card Support
PAR Location Counts

Data Privacy Framework
Fluid Approval Enhancements
Work Center Enhancements
Component Key Word Search

Updates for invoice processing, consolidated invoices, tax calculation, xls upload security
Collections Workbench enhancements
Dunning letters

India Prepayment & Advances updates
System for Award Management enhancements
Enhanced Voucher Build
Clean-up process for Voucher staging tables

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Different Strategies to Improve Selective Adoption

Make me current several times a year – Adopt new features as recommended by business – Use regression tests to validate significant areas.

90% Start a project to isolate customizations. Do it one time or incrementally. Use Event Mapping, Drop Zones, P&FC to the fullest extent possible.

10 Apply everything to a demo environment, resolving all customization issues when available – Repeat the Process once a year to get current.

Incrementally improve the administrative processes around Selective Adoption.

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New Lifecycle Changes in 8.57

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PeopleSoft Update Manager

New Analytics

- Bugs by Language
  - Quickly view/select language bugs
- Bugs by Image Applied From
  - Insight into when maintenance was applied
- Bugs by Dependency
  - Categorize bugs into sections based on the number of dependencies
  - Insight into the size of applying change
- Customization Impacts by Bug
  - Categorize bugs into sections based on customization impacts

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PeopleSoft Update Manager

Cumulative Feature Overview Integration

- Simple export maintenance directly from PUM
- Launch the CFO Tool and Import maintenance
- Drive the definition of a change package from the CFO tool

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PeopleSoft Update Manager

Analyze Applied PRP(s)

- Prevent Partial PRPs from being applied
- Keep mind at ease about continuously applying PRPs to a PUM environment that is used for maintenance

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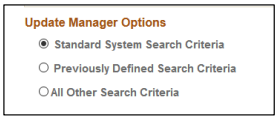
PeopleSoft Update Manager

Search Options

- Changes to the Update Package Wizard
  - New "Standard Searches" provided in addition to "All Updates Not Applied"
    - All unapplied changes for installed products
    - All critical updates not applied
    - All tax updates not applied
    - All true requisites not applied
    - All updates not applied
  - New Option to re-use previously defined package searches
    - Can be migrated to new PUM images



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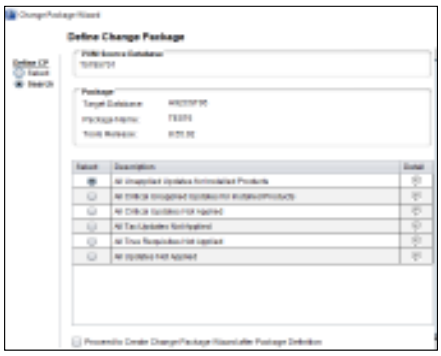
PeopleSoft Change Assistant

- New Wizard – Define a Change Package Directly from CA
- Uses Standard or Pre-Defined Search



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Change Assistant

- Command Line Support for New UI Options
  - PUM Process is now “fully automatable” through Change Assistant.

```
changeassistant [-MODE mode of the CA action (Required)]
                    -MODE UM = Update manager Mode
                [-ACTION action name (Required)]
                    -ACTION ENVIMP = Import Environment
                    -ACTION ENVCREATE = Create Environment
                    -ACTION ENVUPDATE = Update Environment
                    -ACTION PRPAPPLY = Apply PRP
                    -ACTION PTPAPPLY = Apply PTP
                    -ACTION PTUAPPLY = Apply PTU
                    -ACTION UPGAPPLY = Apply UPG
                    -ACTION CPAPPLY = Apply Previously Created (non-PRP) Change Package
                    -ACTION DLTAPPLY = Apply Tools Delta Package
                    -ACTION TDPAPPLY = Apply Translation Delta Package
                    -ACTION RFUAPPLY = Apply Required For Upgrade Package
                    -ACTION CPDEFINE = Define a New Change Package
                    -ACTION CPCREATE = Create Change Package
                    -ACTION UPLDTGT = Upload target info to PUM source
                    -ACTION EMFVAL = Validate EMF Settings
                    -ACTION OPTIONS = Set General Options
                    -ACTION EXPCFG = Export configuration
                    -ACTION IMPCFG = Import configuration
                    -ACTION UPLDCUSTDATA = Upload Customer Metadata And Test Data
                    -ACTION EXPCUSTDATA = Export Customer data from existing PUM Source and save it as a data file
                    -ACTION IMPCUSTDATA = Import Customer data from the selected data file to the New PUM Source
```

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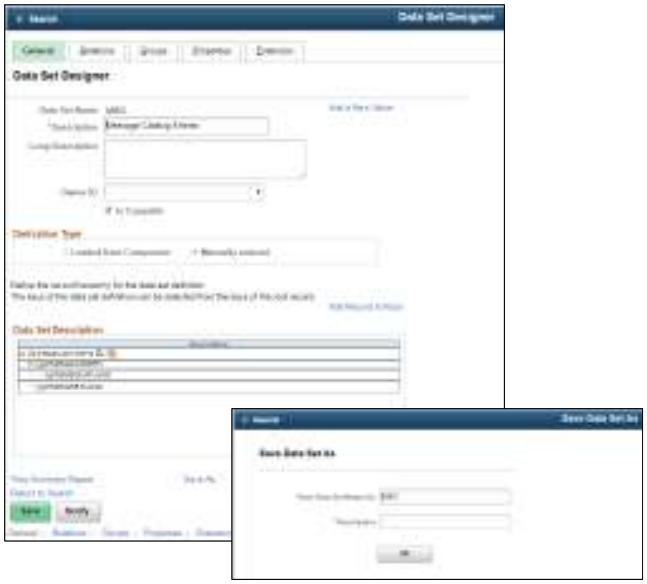
Application Data Sets

- Clone existing Data Set – Create a new Data Set based on an existing definition
- All original properties except extensions



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Application Data Sets

- Use the Last OperID/Last Change DTM for ADS Managed Object Change Tracking
- Used to determine changes
  - Prior to 8.57 Merge Group Compare was used to identify changes
- Managed automatically – Not included on ADS Managed Object records

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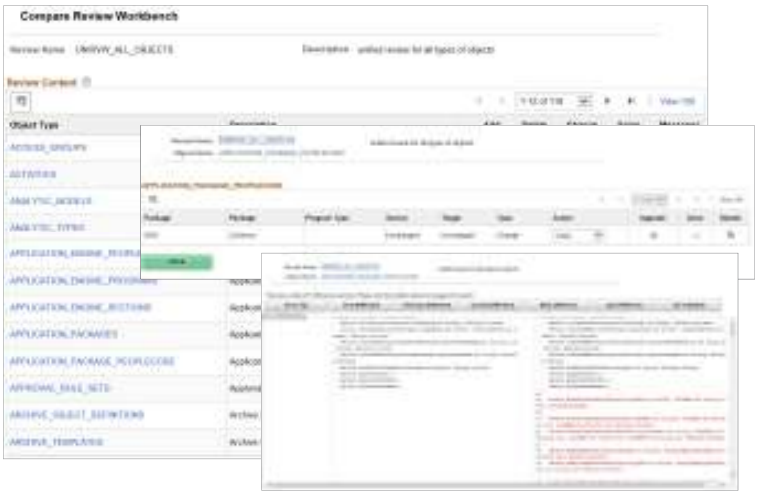
Unified Compare Report

- A unified way to review PeopleTools Managed Objects and Application Data Sets compare report.
- Improved user experience on report reviewing
- Based on new change tracking mechanism



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PeopleSoft Test Framework

- Command line support to execute tests
- Import / export / generate execution options via command line
- Parameters for all command line modes can now be written to response file
- Command line

PsTestFw.exe" -CS=slcxxxx.us.oracle.com:443 -CUA=TRUE -CO=VP1 -CP=VP1 -TST=TEST_KILL_1 -TC=DEFAULT -PFX= -EXO=LOCAL -LOG=TEST_EXE.log

- By file (can be encrypted)

PsTestFw.exe "C:\temp\ptf_cmd_param.txt"

Parameter	Description
-ACTION=exoimp	Import Execution Options
-ACTION=exoexp	Export Execution Options
-ACTION=exogen	Create Execution Options
-ACTION=testrun	Execute Test

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PeopleSoft Test Framework

- Process.Run will wait at the process Monitor to check for expected Run Status
- Optional Parameter distribution_expected will extend wait for an expected Distribution Status

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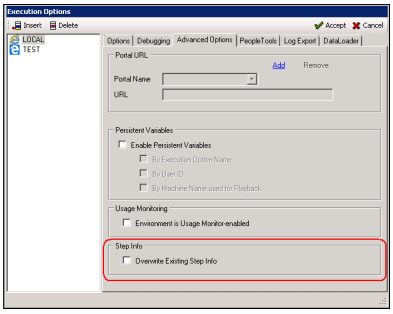
PeopleSoft Test Framework

- Update step info during execution, if inaccurate or missing
- Feature managed at execution option level.



Checked on: Overwrite step info and add where missing
Checked off: Add step info only where missing

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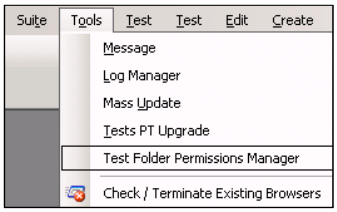
PeopleSoft Test Framework

- User security restricts access to PTF Folders at the Role level
- Security is administered by user with PTF Administrator role
- Candidate Roles must have permission to use PTF client
- Authorization at folder level can be specified as Read/Execute, Modify, and Full Control



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PeopleSoft Cloud Manager

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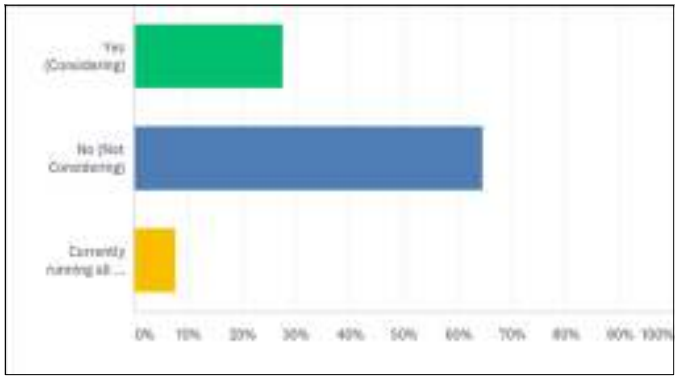
Is your organization considering running PeopleSoft in the Cloud?



- Almost 1/3 are considering moving their PSFT environments to the cloud

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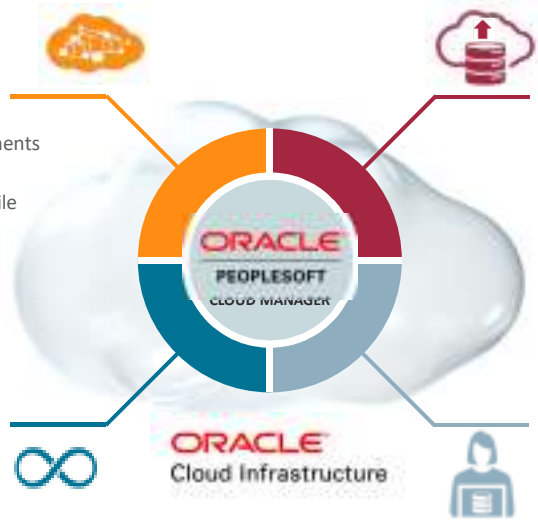
PeopleSoft Cloud Manager

Automate Cloud Adoption

- Elastic scaling based on demand
- Always current, always patched technology platform
- Industry leading secured environments
- Oracle Cloud Infrastructure
  - Bare Metal, DBaaS, Shared File Service, Monitoring, LBaaS

Life Cycle Management

- Subscription to update release channels
- Integrated PUM Support
- Automated application patching
- Automated PeopleTools patch/upgrade



Migrate to Oracle Cloud

- Lift and Shift existing environments to Oracle Cloud
- Migration of your configuration, data, and customizations
- Backup and restore to Oracle Cloud
- Clone for additional environments

Environment Provisioning

- On-demand environments for dev/test/demo and more
- Template driven provisioning enables business users
- Unique topology definitions

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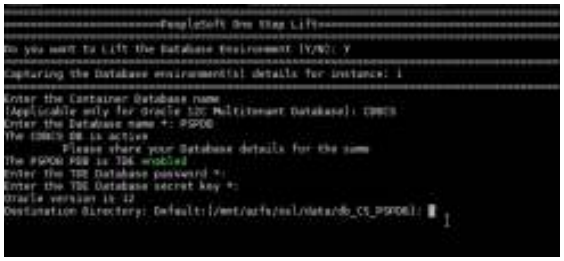
Lift – stage backup in cloud

- Migrate on-premise environment to Oracle Cloud
- Lift utility – package and stage on-premise environment in cloud
- Shift utility – provision environment as defined on-premises on Oracle Cloud Infrastructure



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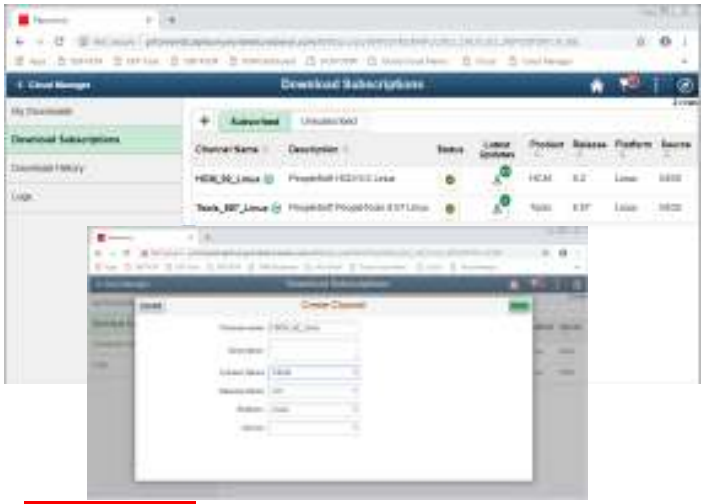
PeopleSoft Cloud Manager



- Subscribe to Maintenance
- Application PUM Images and PRPs
- PeopleTools Patches and Versions
- Simple provisioning of PUM environments that create the PIA image and Windows CA

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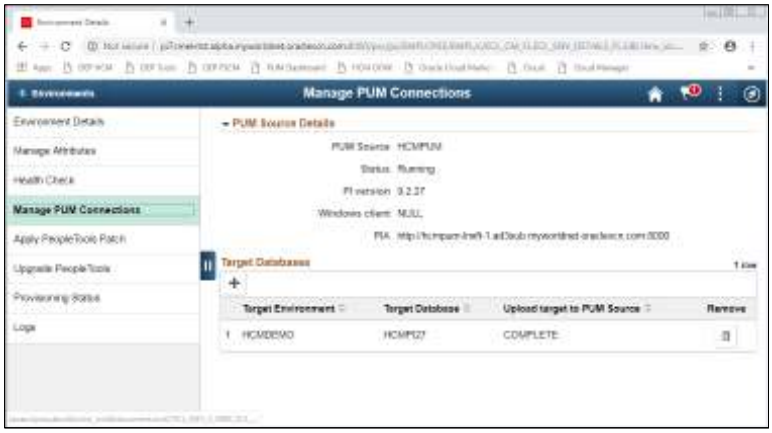
PeopleSoft Cloud Manager

- Assign multiple Target environments to a deployed PUM image
- Change Assistant automatically configured by PUM Image



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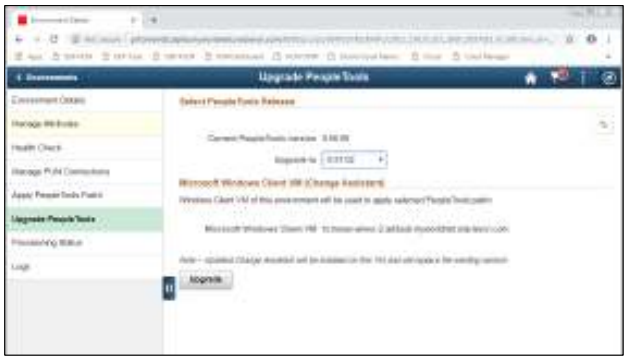
PeopleSoft Cloud Manager



- Automated PeopleTools Upgrades and Patching
- Manually on a deployed environment
- Done as part of provisioning an existing environment

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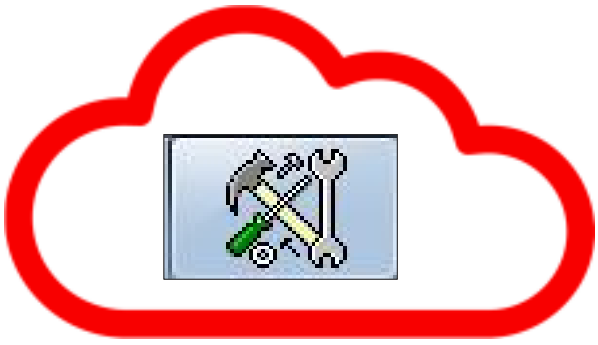
PeopleSoft on Oracle Cloud Infrastructure

- Elastic resources scale on demand
- Provision environments based on standard templates
- Integrated lifecycle management tools



Oracle Cloud Infrastructure (OCI)

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Quantified cost savings from Cloud Manager

"Your executives can't be expected to take a leap of faith when it comes to choosing the most cost- effective method of operating your PeopleSoft system.

They need to know the facts. While there are many choices available, our comparison study unequivocally shows significant time and cost savings with running your PeopleSoft system in the Oracle Cloud."

Download your copy here

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Automated vs Manual Lift and Shift Timings

Lift and Shift using Cloud Manager	Duration	Lift and Shift using Traditional Method	Duration
Package DB at source	55 minutes	DB Export and compression	40 minutes
Package PS Mid-Tier at source	80 minutes	PS Home compression	5 minutes
Upload DB and PS Mid-Tier to Cloud	12 minutes	Upload DB and PS Home copy to target server	30 minutes
Deploy DB in Cloud	70 minutes	DB, PS software deployment on target server	170 minutes
		DB Import	120 minutes
Deploy PS Mid-Tier in cloud	68 minutes	Post Refresh activities	30 minutes
Total Duration	**285 minutes**	**Total Duration**	**395 minutes**

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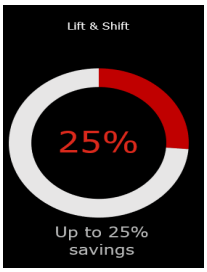
Effort and Cost Savings

Based on timings recorded, automated lift and shift using Cloud Manager can save up to 25% compared to traditional method.



- Lift and Shift effort for typical PeopleSoft installation = 120 FTE Days
- Estimated effort savings of using Cloud Manager = 30 FTE Days
- ***Estimated cost savings of using Cloud Manager = $15,000***

** Cost savings are calculated based on a median on-premise installation that has 8-10 environments and managed using internal resources with an average daily rate of $500.*

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Deploy PUM Image – Timing Comparison

Activities	PeopleSoft Cloud Manager	Traditional Method
Versions	HCM 9.2 Image 28	HCM 9.2 Image 28
Download files from Oracle Support	Automated download	Manual download Average. 75 Minutes
Extract and Prepare for Installation	5 Minutes	30 Minutes
Deploy Application Components	5 Minutes	5 Minutes
Deploy PeopleTools Components	5 Minutes	5 Minutes
Install and setup Database	25 Minutes	25 Minutes
Configure PT Middleware	15 Minutes	25 Minutes
Total Duration	**55 Minutes**	**165 Minutes**

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PeopleTools Patching – Timing Comparison

Activities	PeopleSoft Cloud Manager	Traditional Method
Software Versions	Source Version - 8.56.09 Target Version - 8.56.12	Source Version - 8.56.11 Target Version - 8.56.13
Download Software	Automated download	Manual download 45 Minutes
Domain Shutdown/Backup	2 minutes	15 Minutes
Deploy PT Client	5 minutes	15 Minutes
Apply patch to database	15 Minutes	30 Minutes
Deploy Mid-Tier Components	25 Minutes	90 Minutes
Total Duration	**50 Minutes**	**195 Minutes**

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PeopleTools Upgrade – Timing Comparison

Activities	PeopleSoft Cloud Manager	Traditional Method
Versions	Source Version - 8.56.12 Target Version - 8.57.01	Source Version - 8.56.13 Target Version - 8.57.03
Download files from Oracle Support	Automated download	Manual download 45 Minutes
Domain Shutdown/Backup	2 minutes	15 Minutes
Deploy PT Client	5 minutes	15 Minutes
DB Upgrade tasks	180 Minutes	420 Minutes
PT Mid-Tier Configuration	20 Minutes	90 Minutes
Total Duration	**210 Minutes**	**585 Minutes**

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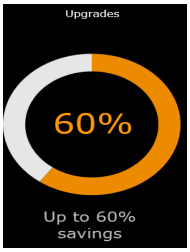
Effort and Cost Savings

Based on timings recorded, automated life cycle management using Cloud Manager can save up to 60% compared to traditional method.



- Estimated effort savings of using Cloud Manager = 36 FTE Days / Year
- **Estimated cost savings of using Cloud Manager = $18,000 / Year**

** Cost savings are calculated based on a median on-premise installation that has 8-10 environments and managed using internal resources with an average daily rate of $500.*

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Resource Optimization

- Cloud Manager provides self-service capability to perform a number of system administration activities,
  - Start/Stop PeopleSoft instances
  - Provision new environments by cloning running instances
- These capabilities enable cost saving in couple of ways,
  - Reduced load on system administration resources to perform these tasks
  - Reduced infrastructure costs when PeopleSoft instances are kept running only when needed and shutdown when not in use
- Most on-premise installations have infrastructure provisioned for peak usage.
- Industry estimates places on-premise infrastructure are over provisioned on average by 35%.

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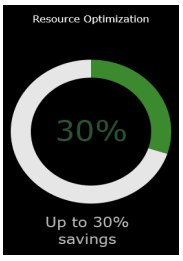
Effort and Cost Savings

Effective use of Cloud Manager's capabilities **can save up to 30% costs** in infrastructure and labor costs.



- Average Cloud Infrastructure Cost - $18,000/Year
- ***Estimated cost savings of using Cloud Manager = $5,400/Year***

** Cost savings are calculated based on a median on-premise installation that has 8-10 environments and managed using internal resources with an average daily rate of $500.*

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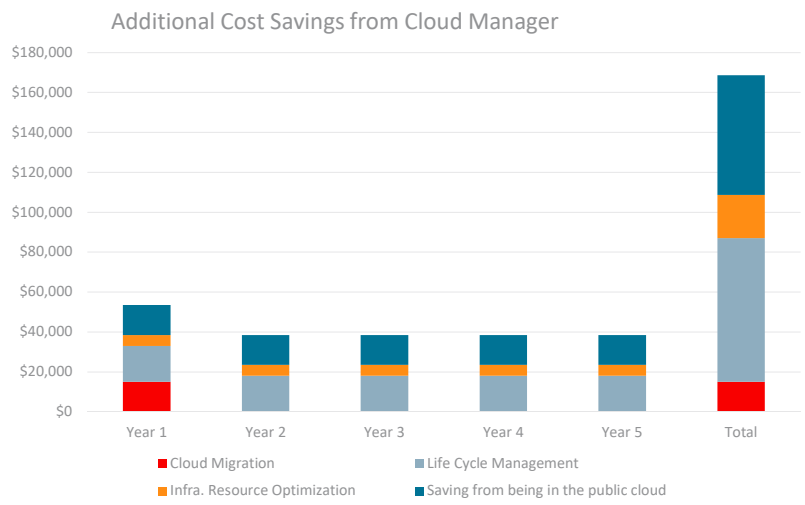
Savings of running PeopleSoft on Oracle Cloud



- Cost savings illustrated for medium sized PeopleSoft installation with annual infrastructure spend of $100,000
- Up to $170,000 (34%) savings over a 5-Year period by running PS applications on Oracle Cloud and using Cloud Manager.
- 2/3rd of this cost savings from Cloud Manager.

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What's Next

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Oracle Cloud Test Drive Series

- Learn how to migrate Oracle Apps to Oracle Cloud
- Hands-on labs include:
  - OCI Fundamentals – deploy a basic workload onto Oracle Cloud Infrastructure
  - Use application-specific cloud automation and tooling
- Enjoy an upgraded lunch experience from locally known chefs and restaurants
- For further information, visit https://www.oracle.com/corporate/events/cloudtestdrive/

Q1	Q2	Q3	Q4
San Francisco, 7/30 EBS	Dallas, 9/3	Atlanta, 12/3	Phoenix, 3/17
Toronto, 8/6 PSFT	Austin, 9/24	Los Angeles, 12/10	Philadelphia,4/7
NYC, 8/13 JDE	Columbus, 9/24	Calgary, 12/17	
Boston, 8/20 EBS	Denver, 10/1	Charlotte, 1/7	
	Houston, 10/8	Seattle, 1/14	
	Minneapolis, 10/15	Vancouver, 1/21	
	Montreal, 10/22	St. Louis, 1/28	
	Chicago, 11/19	Detroit, 2/4	
		Kansas City, 2/11	

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Resources

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PeopleTools 8.57 Training

- Oracle University Training
  - PeopleSoft Fluid User Interface Rel 8.57
  - PeopleSoft PeopleTools I, II, and I / II Rel 8.57 Accelerated
  - PeopleSoft Update Manager Rel 8.57
  - PeopleSoft Lifecycle Management and Update Manager Rel 8.57
  - PeopleSoft Deployment Packages Rel 8.56 – *Recently released*

  Check Oracle University for updates
- Spotlight Series
  - Deploying Elasticsearch in PeopleTools 8.57
  - Moving from Elasticsearch 2.3.2 to 6.1.2
  - PeopleSoft Cloud Manager

  Check the PeopleSoft Spotlight Series on the PeopleSoft Info Portal for new videos

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New Spotlight Series Videos

- HCM
  - HCM Activity Guide Composer
- FSCM
  - Managing Bank Reconciliation
  - Cash Forecasting
  - Using the Fluid Billing WorkCenter
  - Managing Reconciliations in General Ledger
  - Transitioning to the Lease Accounting Guidance
  - PeopleSoft Mobile Inventory Management Supporting HIBC
  - Contracts Revenue Recognition
  - Importing Asset Data Using the Import Data via Spreadsheet Feature

PeopleSoft Spotlight Series

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New Spotlight Series Videos, Continued

- Tools and Technology
  - Administering and Using Simplified Analytic
  - Developing Fluid Applications – Updated
  - Applying a PeopleTools Patch using DPK PeopleTools 8.56
  - Administering PeopleSoft Search Framework in PeopleTools 8.56
  - Class Search and Browse Catalog with Elasticsearch
  - Cloud Manager Image 05

Check the PeopleSoft Spotlight Series on the PeopleSoft Info Portal for new videos

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Be Heard: My Oracle Support Community

Idea Space

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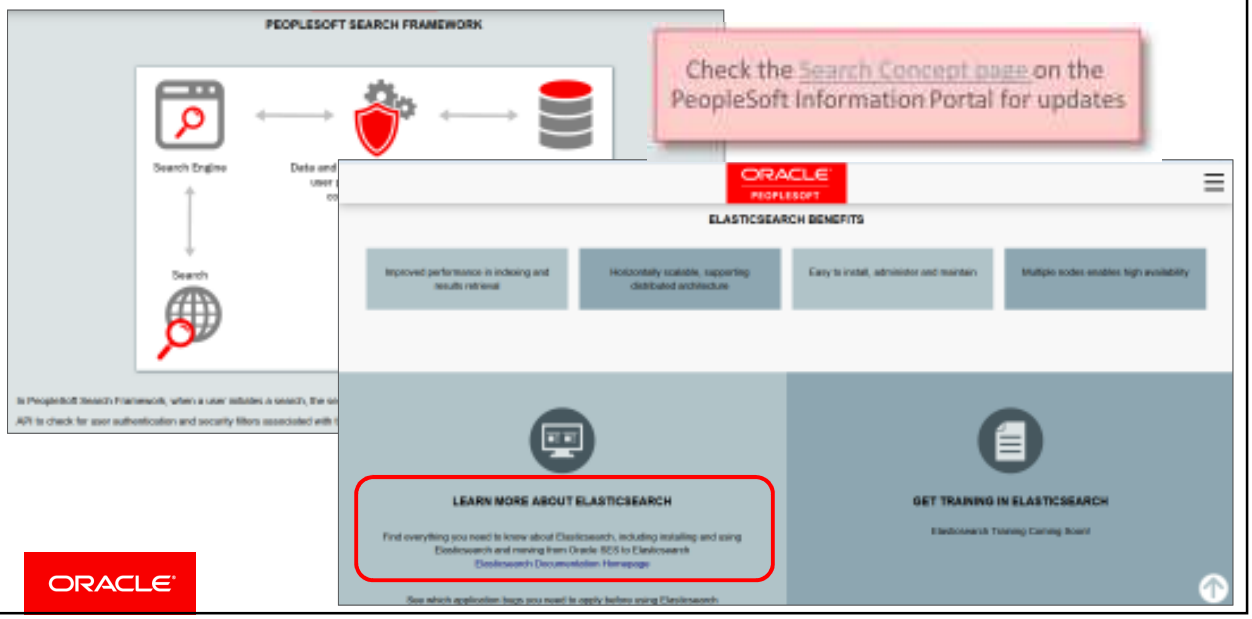
Concept Pages – On the Information Portal



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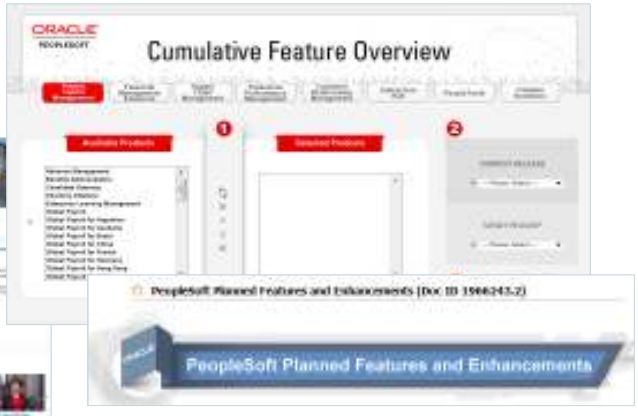
Get Connected and Stay Informed

Key PeopleSoft Information Sources

PeopleSoft Information Portal

PeopleSoft Video Feature Overviews and PeopleSoft Talks

PeopleSoft CFO Tool



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