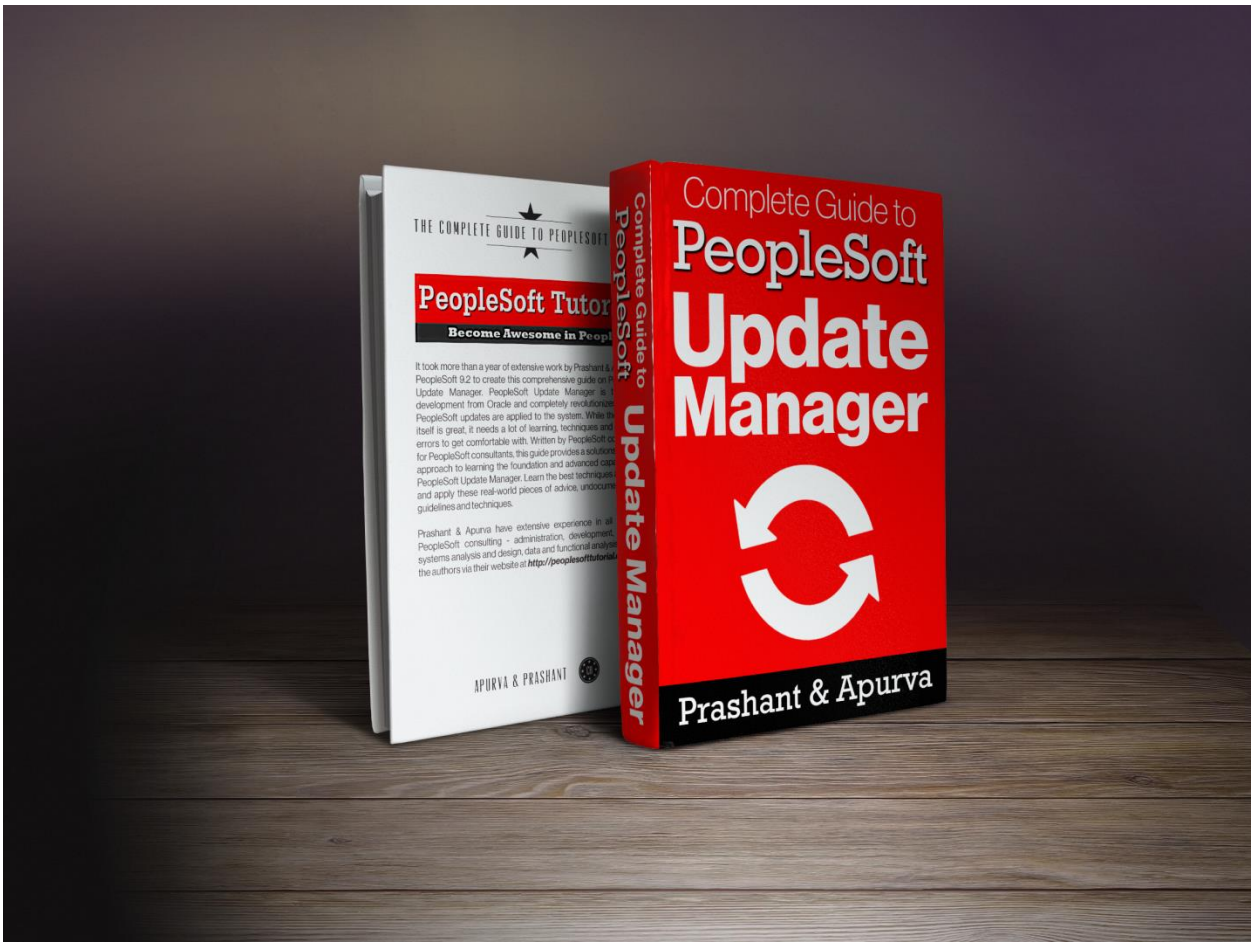
Complete Guide To

PeopleSoft Update Manager

October 2014

PeopleSoft Tutorial



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About

Apurva and Prashant had done several interesting ventures together and it was in December 2012 that they decided to start a website on PeopleSoft and related technologies, which would serve as the go-to place for all the PeopleSoft consultants.

They started by putting together thousands of personal notes and how-to guides online at PeopleSoftTutorial.com. Backed by 20+ years of combined rich experience working in PeopleSoft and related technologies for multiple clients over several assignments – their primary goal was to create material which will find relevance and it was not long before appreciations started pouring in.

Just in a couple of months, Feb 2013, the site was getting 500+ unique visitors every day and by the end of 2013, daily visits started touching 1000. The site has continued to receive a steady increase in traffic month to month with 30% of the traffic being repeat traffic. We also receive 10+ comments and inquiries every day related to questions, doubts, issues and training on several of PeopleSoft topics.

What started as a casual endeavor to help others had turned serious business and drove them to work even harder on the website – stay relevant and provide the best information possible. Though this endeavor took a lot of time out of their personal lives, but there was satisfaction of giving back to the society and making their life worthwhile.

You can also get in touch and join the movement:

http://peoplesofttutorial.com/contact-us/

"The purpose of life is not to be happy. It is to be useful, to be honorable, to be compassionate, to have it make some difference that you have lived and lived well." — Ralph Waldo Emerson

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Chapter 1 – Overview of PeopleSoft Update Manager

PeopleSoft Application Maintenance

PeopleSoft applications once installed require regular maintenance to fix bugs and avoid critical issues. It's always recommended to keep your PeopleSoft application updated to the latest update delivered by Oracle. Falling behind on maintenance can increase the level of difficulty in applying an important fix and make it more costly and time consuming. Conversely, maintaining a current code line simplifies the steps involved in applying a fix and reduces the time required to do so. Additionally, performing maintenance enables you to:

- Install needed updates to maintain tax and regulatory compliance.
- Stay current with generally released software updates for more maintenance activities.
- Fix critical functional issues.
- Obtain performance or functional enhancements.
- Minimize the difficulty in applying a future fix (or future upgrade).
- Avoid known issues.
- Apply critical security fixes (CPU fixes).

Maintenance for pre-9.2 applications includes applying fixes, bundles, maintenance packs to keep the application updated. For PeopleSoft 9.2 applications, maintenance process has changed and a new process known as PeopleSoft Update Manager (PUM) is used to keep PeopleSoft 9.2 applications up to date.

Introduction to PeopleSoft Update Manager and Virtual Images

PeopleSoft Update Manager (PUM) is a new lifecycle management process aimed to help customers stay current on application patching and lower the cost of application maintenance. It's only available for PeopleSoft 9.2 applications.

How PeopleSoft Update Manager (PUM) Works?

PeopleSoft Update Manager (PUM) is the new maintenance process and this patching facility is currently available for 9.2 applications only. To understand this process, you would need familiar with below terms:

1. PeopleSoft Image (PI)

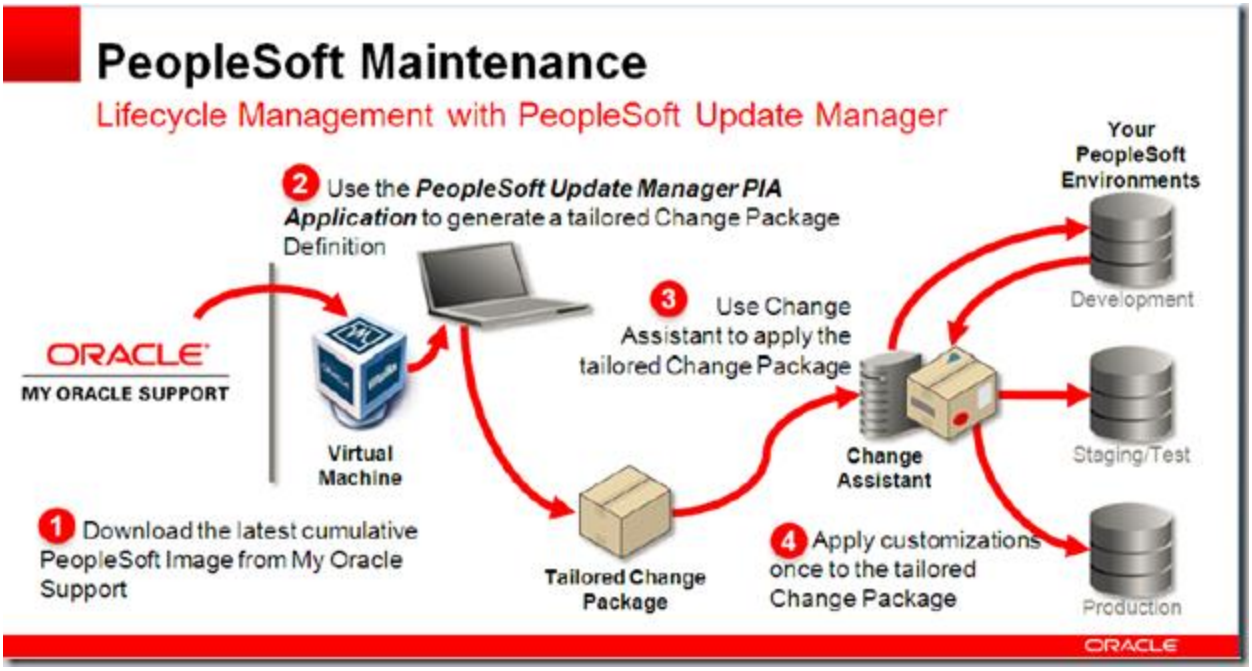
With PeopleSoft version 9.2, Oracle started delivering pre-configured PeopleSoft Images which are up to date with latest patches. You need to download the image (specific to your application) on your local system and use Oracle Virtual Box to run it. **This PeopleSoft Image will be your master source environment from where you will pull the updated objects, patches & create a custom change package and apply updates to your environment.**

This PeopleSoft Image being cumulative will have all the updates for your application and the image is updated periodically by Oracle based on a schedule posted on PUM Home page. PI also contains new features and enhancements, which can be installed directly to a target environment.

2. PeopleSoft Update Manager PIA Application

Once you download the PeopleSoft Image for your application and deploy a PeopleSoft environment using Virtual Box you can then search for the required patches/fixes for your application using PeopleSoft Update Manager PIA Application. **PUM PIA application is a patch searching tool and custom change package generator. You choose only those updates that you want and then create a customized change package for your application.**

PeopleSoft Update Manager PIA application will only be available inside the PeopleSoft Image delivered by Oracle and you won't find it inside other PeopleSoft applications that you may install manually using classic installation method.



3. Change Assistant

Customized package that you create using PeopleSoft Update Manager PIA application based on your selections, will be used by Change Assistant to apply on your PeopleSoft environments. Change Assistant will be used to generate the change package, compare it with your environment and apply it to your environment.

Benefits of PeopleSoft Update Manager

1. Bundles and Maintenance Packs are Gone: You no longer need to apply fixes, bundles or maintenance packs to your target application. Simply search and select the updates you want to apply and create a customized change package to be deployed on your target environment.

2. Only One Change Package to Be Applied: Earlier if you wanted to apply multiple patches, maintenance packs or bundles, they all needed to be applied one by one in a particular pre-defined order. But now you only have one cumulative change package to apply.

3. Automatically Includes Dependencies: If you choose to apply a particular fix and it has a few dependencies, then PeopleSoft Update Manager will automatically add those dependencies to the customized change package. For e.g. if you select to apply tax update 14E and you haven't applied 14D already to your target environment, then PUM PIA application will automatically include 14D in the change package.

4. Shows Currently Installed Updates: PUM also shows you what is currently installed in your PeopleSoft environment, which makes selection process really fast and easy.

5. PeopleSoft Image Released On A Fixed Schedule: Oracle announces the release of PeopleSoft Images in advance so you know when the new Image is going to be available. This will help you in planning maintenance accordingly.

6. Quickly Address Critical Issues: As you will have the latest PeopleSoft Image installed on your local environment, you can search for updates and patches in your local copy.

7. Reduce Manual Steps for Patching: PUM automatically removes the updates, which are already applied to your environment. This helps in reducing time and effort spent in analysis, preparation, patching and verification.

8. No Requirement of DEMO Environment: Customers using Oracle database don't need to maintain a separate DEMO environment as the PeopleSoft Image can be used as a DEMO environment. Customer using other database or multi-lingual platform will need to maintain a separate DEMO environment.

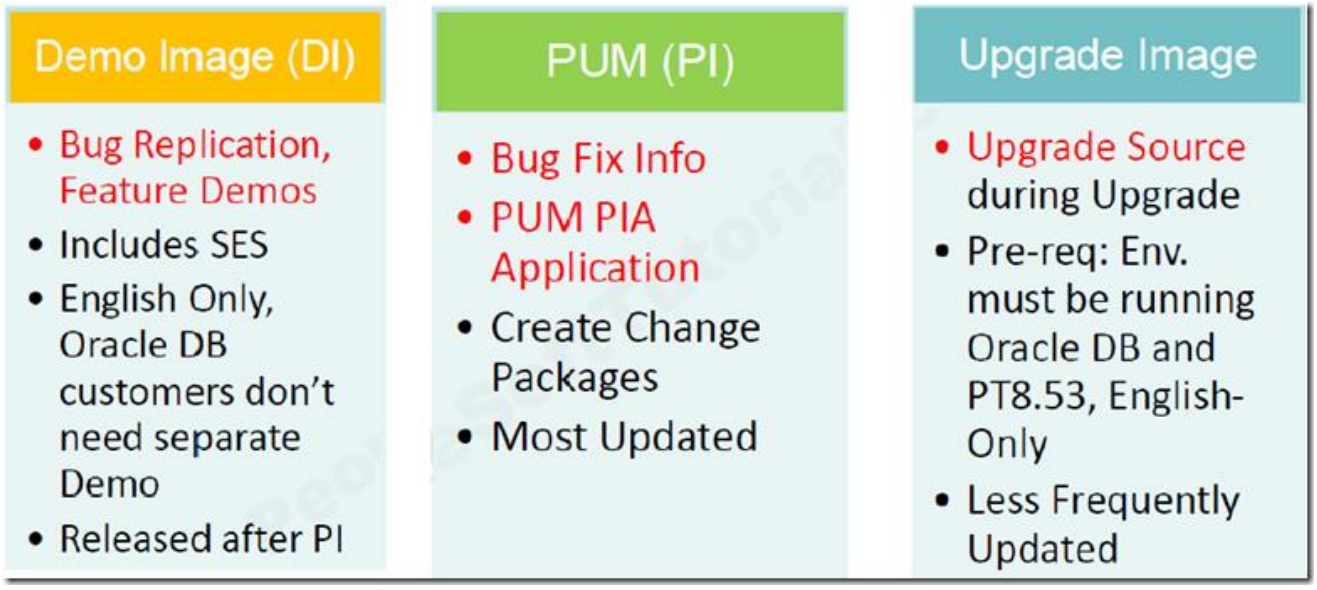
Different Types of PeopleSoft Virtual Images

PeopleSoft Virtual Images can be used for a variety of purposes like Demo, training purposes, applying patches, during upgrade etc. Each PeopleSoft Virtual Image type has a specific purpose. Below are 3 different types of PeopleSoft virtual image release by Oracle initially.

1. Demo Image – No Longer Delivered Separately

Demo Image can be used for doing demonstrations, trainings, bug replications etc. It also includes SES server and hence would be larger in size than other 2 image types. If you're a PeopleSoft customer with Oracle database with English only environment, then you can use this image as your Demo environment and don't need to maintain a separate Demo environment. Customers having DB2/ SQL Server databases still need to create a Demo environment built using classic installation method.

Note: Starting with Image 6, PeopleSoft Demo Image and PUM Image have been combined.



2. PeopleSoft Image (PI)

PeopleSoft Image (PI) is the one you will find yourself using the most with 9.2 applications. PI is part of the PeopleSoft Update Manager (PUM) which is the new maintenance approach for 9.2 applications.

PI is used to get the bug info and generate change packages to apply selected fixes. Advantage of using PI is that, customers have the flexibility of selecting the bug fixes that they want to apply. Once PI is setup with target environment details uploaded in the image, it is very simple to search, review and apply bug fixes. You can select any of the below scope to search for patches.

- **All updates not yet installed**- to apply all the delivered updates.
- **Specific updates** – search by entering the bug numbers.
- **Updates by criteria** – search by product family, installed product, image number, severity, required at install, required at upgrade etc.
- **Updates by object name** – search by object name e.g. record name, field name etc.

As PI is used for performing PeopleSoft maintenance, it will be the most updated of all the image types and schedule for next image release is posted in advance on Oracle support.

Note: PI is the image that we will use for PUM and purpose of this guide.

3. PeopleSoft Upgrade Source:

PeopleSoft Upgrade Source image can be used as a source during the initial upgrade pass. When performing initial pass during application upgrade, you are required to provide the source as new release demo environment. Customer who are on PeopleTools 8.53 and

have English-only environment can use the Upgrade source image during the upgrade. This image is the least frequently updated.

Different Types of PUM Patches

When working with PUM process, you need to understand the different types of patches that can be applied.

Patches extracted from PeopleSoft Image: These are the patches that you search and select in your PUM PIA Application and then apply on your target using CA.

PeopleSoft Release Patchset (PRP): PRP patches are the patches that are released by Oracle between two releases of PeopleSoft Image. PRP patches can be downloaded from Oracle support and are always applied to current PeopleSoft Image (PI). After these are applied to PI, then you can configure PUM to apply those updates to your target. PRP patches are never applied to your target environment directly.

Proof of Concept (POC) Patches: In rare scenarios, POC patches are provided by Oracle to meet specific customer needs. As POC patches are only specific to a customer, so they may or may not be available in the next release of PeopleSoft Image. POC patches are usually provided to address critical issues in Production environments and are considered to be a customization. PUM and PI are not needed to apply POC patches.

PUM Maintenance Strategies

PUM process lets customer apply maintenance to 9.2 applications and provides different scope & criteria that can be used to search and apply updates to the target environment. Though PeopleSoft Image will have all the latest bug fixes but it's up to the customer to decide which one to apply to their environment. Maintenance strategy can fall under 3 categories:

- Proactive

Proactive refers to an approach when you download the latest PI once it's released and **apply all the updates delivered in PI** to your target environment. This strategy makes sure that your environment is up to date and has latest Oracle patches. Implementing this strategy might require additional resources to analyze and review large number of patches.

- Selective

You can be selective when you download the latest PI once it's released and **apply only those patches that are applicable to your current environment**. You can search for patches using different search criteria such as product, severity, image number etc. and various others. You can then review those patches and finally select the ones you want to

apply. This approach enables you to stay reasonably current without high level of resource dedication or scheduling associated with proactive approach.

- Reactive

Maintenance strategy would be referred to as reactive, if you download the PeopleSoft Image but apply patches only when you get issues. This is the least recommended PUM maintenance approach as there is no regular maintenance and any issues that arise could be critical and potentially compromise efficiency and adversely affect your business operations.

If you choose reactive maintenance strategy, at least make sure you download the PI once it's released so that you don't spend time downloading the image files when there is a critical issue going on.

Steps Involved In Deploying PeopleSoft Images

Now that you've gained a basic understanding of new maintenance process i.e. PUM for PeopleSoft 9.2 applications, you can now work on setting up PUM. Below are the steps that are required in order to setup PUM.

1. Install Oracle Virtual Box
2. Download PeopleSoft Image from Oracle Support
3. Extract and Merge PeopleSoft Image Files
4. Enable Virtualization in BIOS
5. Import PeopleSoft Image File into Oracle Virtual Box
6. Finish PeopleSoft Image Configuration
7. Install PeopleSoft Change Assistant Tool
8. Configure PeopleSoft Configuration Manager
9. Configure PeopleSoft Change Assistant for Update Manager
10. Configure environment and upload target database details to PUM application
11. Search patches and generate Change Package using PUM PIA application
12. Apply Change Package Using PeopleSoft Change Assistant

In upcoming chapters you will learn about all of these steps in detail.

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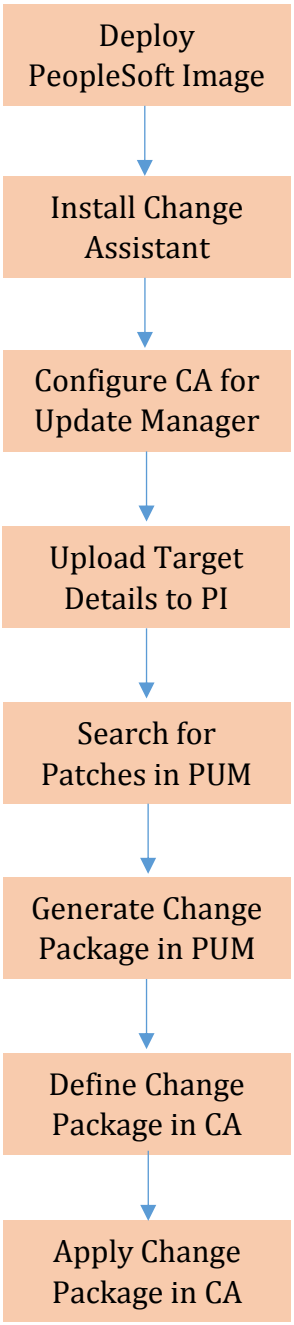


Steps in Applying Patches Using PUM

Chapter 2 – Oracle Virtual Box & PeopleSoft Images

First step in configuring and implementing PUM, is to download and deploy PeopleSoft Image (PI) on your local environment. PeopleSoft Image is a pre-packaged PeopleSoft application that needs virtual machine management software such as Oracle Virtual Box. In order to install Oracle Virtual Box and deploy PI, there are few hardware requirements that need to be reviewed and met.

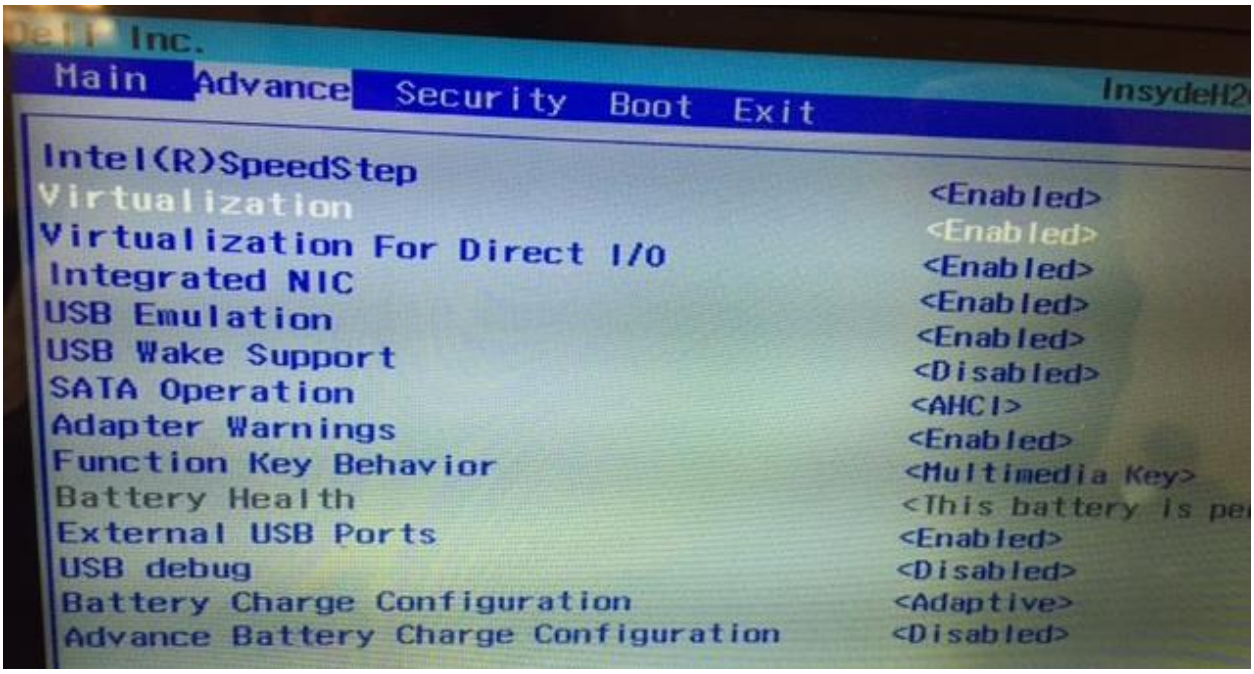
Hardware Requirements for PeopleSoft Virtual Machines

PeopleSoft Virtual Machines have specific hardware requirements which must be met before you can install and configure PeopleSoft Images.

Physical Host System: A physical host system is required for installing Oracle Virtual Box and deploying PeopleSoft Image. You can't install and use PeopleSoft Images on other virtual machines. Additionally these images can't be deployed on cloud environments.

Host Operating System: Host operating system must be a 64-bit Microsoft Windows that meets the certification criteria for PeopleTools.

CPU: Processor must be 64-bit with hardware virtualization enabled. You can enable virtualization from BIOS. Host system must have 64–bit CPUs that support Intel Virtualization Technology or AMD Virtualization Technology hardware virtualization features.



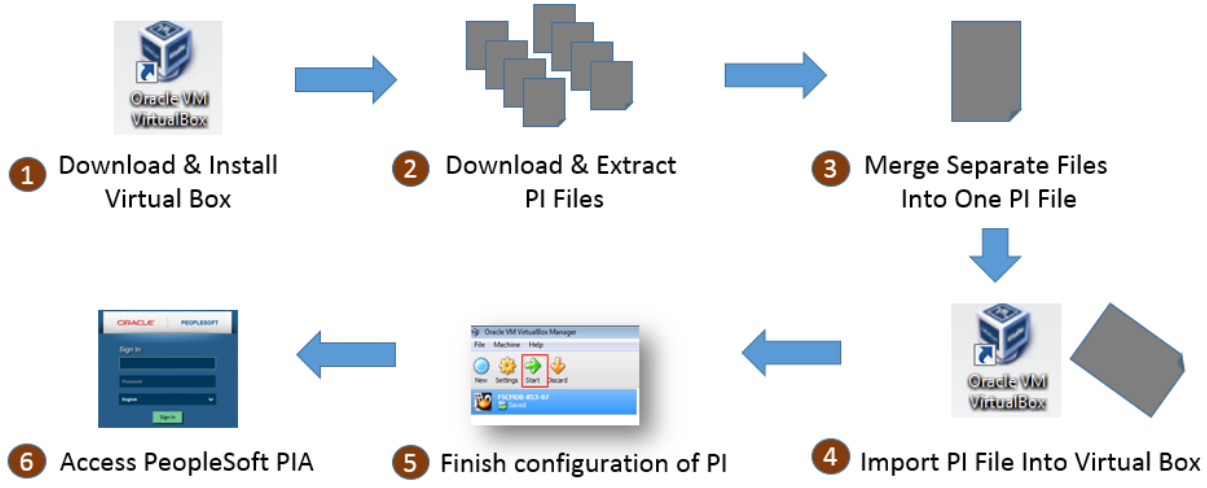
Note: BIOS settings could be different for different manufacturer. Please make sure you follow the correct process to enable virtualization for your platform.

RAM: PeopleSoft Images requires a minimum of 6 GB of RAM. RAM is allocated as soon as Virtual machine is started and it won't be available for host operating system. Though you can make changes to RAM for PeopleSoft Images but having at least 8 GB of RAM is recommended.

Disk Space: You would need to have around 200 GB of free disk space for purpose of downloading image files, merging image files and then initializing PeopleSoft Virtual machine.

After PeopleSoft Image is deployed successfully, you can free up space by deleing the Image files.

Steps in Configuring PeopleSoft Image



CONFIGURING PEOPLESOFT IMAGE (PI)

Here are the steps that are required for deploying and configuring PeopleSoft Image.

1. Download & Install Oracle Virtual Box
2. Download & Extract PeopleSoft Image(PI) Files from Oracle Support
3. Merge PI files into one .OVA file
4. Import PI file into Virtual Box and configure network settings
5. Finish configuration of PeopleSoft Image
6. Access PeopleSoft PIA

What is Oracle VirtualBox?

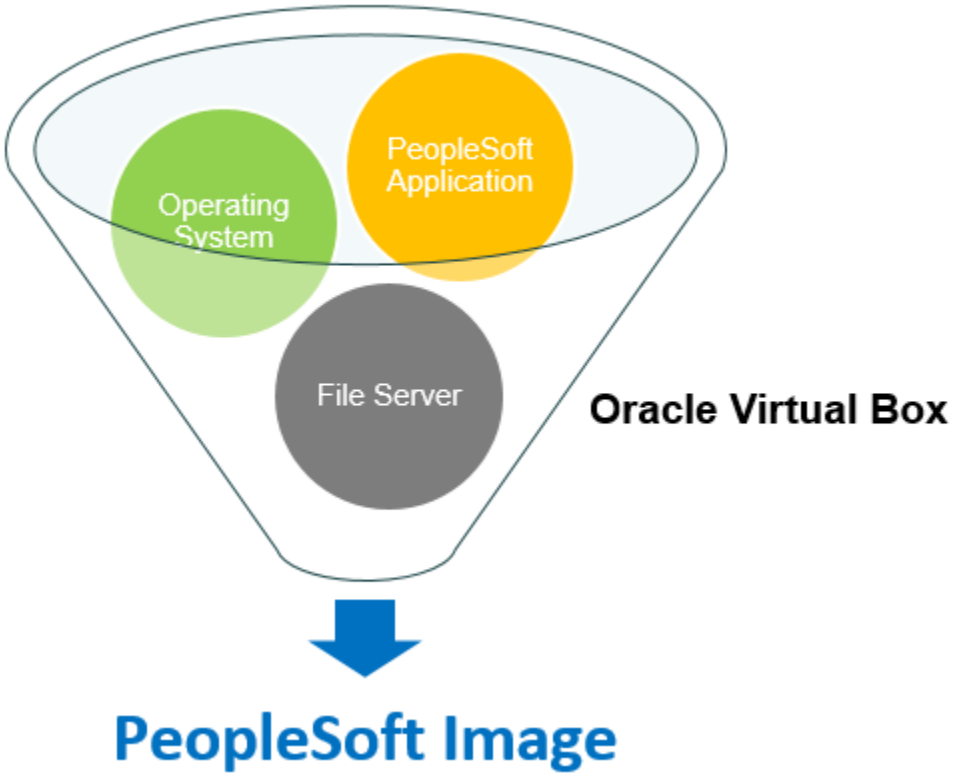
Oracle Virtual Box is a virtualization product from Oracle that allows one or more guest operating systems to be run on and in a single host OS. Oracle VM VirtualBox (formerly Sun VirtualBox, Sun xVM VirtualBox and Innotek VirtualBox) is an x86 virtualization software package, created by software company Innotek GmbH.

Sun Microsystems acquired Innotek in February 2008. Oracle Corporation acquired Sun in January 2010 and re-branded the product as “Oracle VM VirtualBox”.

Oracle created pre-build virtual machines of PeopleSoft products such HCM 9.2, ELM 9.2, CRM 9.2 and FSCM 9.2, which can be deployed in Virtual Machine manager such as Oracle

VirtualBox. These virtual machines enable you to get a PeopleSoft application up and running within few hours without having to install PeopleSoft software.

PeopleSoft Virtual Images delivered by Oracle consists of Oracle Linux Operating System, PeopleSoft Application, PeopleSoft File Server and various other components.



1. Download & Install Oracle Virtual Box

First step in deploying PeopleSoft Virtual Images is to download and install Oracle Virtual Box.

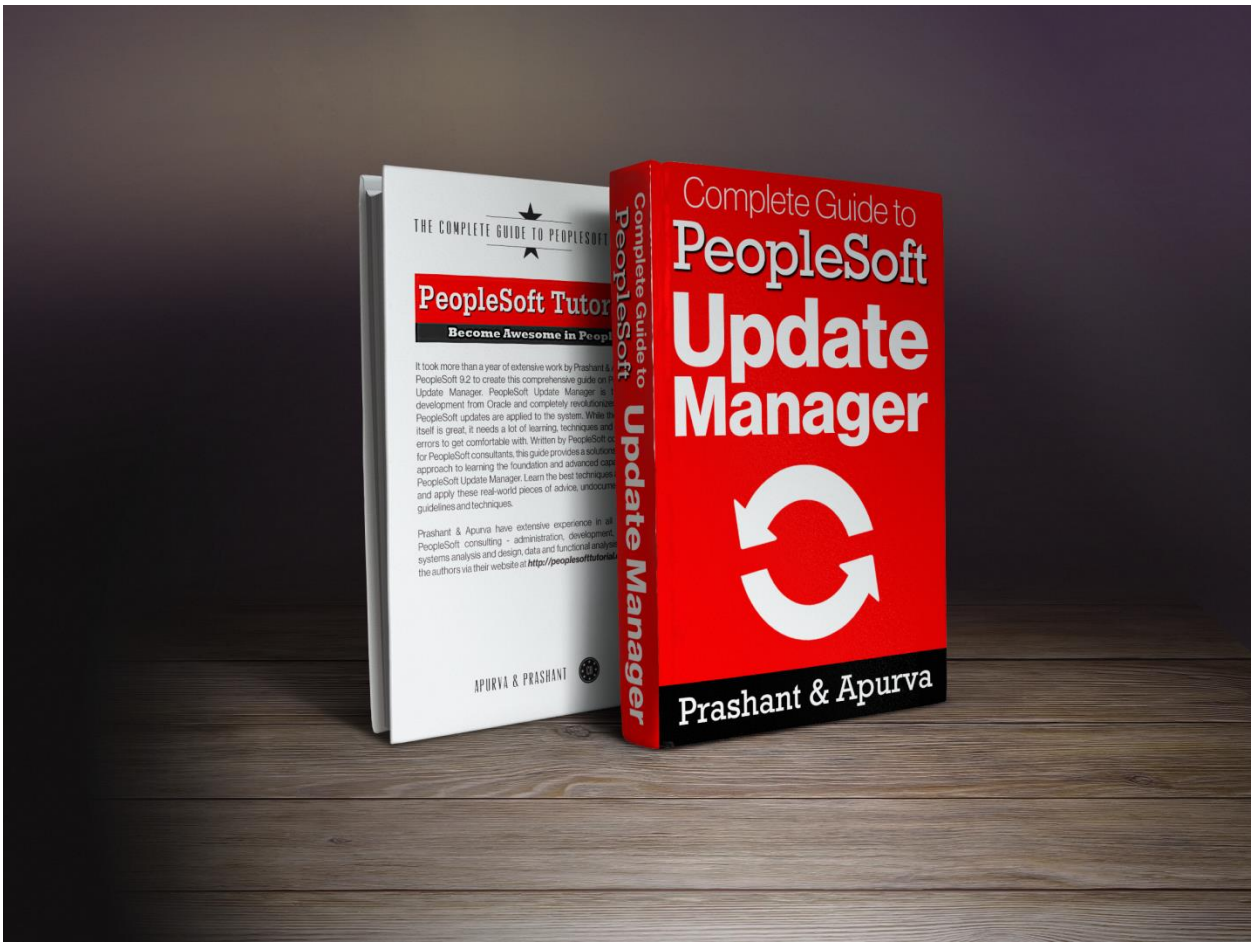
You can download Oracle Virtual Box from https://www.virtualbox.org/wiki/Downloads

Make sure to download the latest version available as newer PeopleSoft Virtual Images require newer version of Oracle Virtual Box. Please see notes section of the PeopleSoft Image download page for minimum supported version of Oracle Virtual Box.

Installation of Oracle Virtual Box requires local admin rights. Installation is very simple and similar to installation of any other software.

2. Download PeopleSoft Image files from Oracle Support

After you finish installing Oracle Virtual Box, next step is to download the PeopleSoft Virtual Image files that need to be deployed. Latest PeopleSoft Image files are available for download on Oracle Support. Simply search for **'PeopleSoft Update Manager'** or directly go to **Doc ID 1641843.2** for PeopleSoft Update Manager (PUM) Home Page.



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