

# PeopleTools PUM and ElasticSearch Workshop

## Training Agenda

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### Day 1 – PeopleSoft PeopleTools & Application Upgrade Strategy

#### Upgrade

- Automation
- Documentation

#### Security Strategy

- Environments
- Upgrade Methods
  - One-time production conversion, maintain in QAT
  - Convert from Production
  - Key into Upgrade Master or configure in MTP target

#### Retrofitting Strategy

- Customizations
  - Bolt-on Customizations
  - Delivered/Modified

#### Cut-Over Plan

- Upgrade
- Customization Migration
- Security
- Manual Steps
- Batch Processes

### Day 2 – PeopleSoft Update Manager

#### PUM Overview

- Types of Patches
- Change Package

#### Architecture Overview

- Oracle Virtual Box
- PeopleSoft Image
  - OS: Oracle Linux
  - Oracle Database
  - WebLogic Web Server
  - Tuxedo Middleware
  - Elastic Search
  - COBOL (not included)
  - Software
- PeopleSoft Environment Management Framework
  - Agents
  - Hub
  - Viewer
- Lifecycle Tools
- Change Assistant

#### PUM Environment Maintenance Strategy

- Initial Pass and MTP Pass
- Customizations and Retrofitting

#### PUM Configuration

- Client Tools
- Change Assistant Configuration
- Target Database Upload
- Use PeopleSoft Environment Management Framework or Copy Files Manually

#### Performing Image Maintenance

- Define Change Package
  - Image Maintenance
  - Tax Updates (Optional)
  - Selective Adoption
  - Patches
- Apply Change Package