

PeopleTools 8.57-8.59 PeopleSoft Update Manager (PUM) and ElasticSearch

Training Agenda

PeopleTools PUM and ElasticSearch Agenda

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

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

Installing Elasticsearch and Configuring PeopleSoft Search Framework

- Explaining the Features of PeopleSoft Search
- Describing the PeopleSoft Search Framework
- Describing Elasticsearch
- Installing Elasticsearch (using DPK)

Managing an Elasticsearch Cluster

- Describing Cluster Setup
- Adding a New Node to the Cluster
- Starting and Stopping the Cluster

Deploying Search Definitions and Building Search Indexes

- Creating a Search Instance (using ACM template)
- Locating Delivered Search Definitions
- Deploying Search Definitions and Search Categories
- Building Search Indexes: Attachment processing (Direct Transfer), partitioning data based on date range, using separate index for SDs with large data, and monitoring/troubleshooting index process.
- Deploying and Indexing Data (using ACM template)
- Working with Incremental Index Updates

Configuring End User Search Options

- Working with Search Framework Search Results
- Enabling Global Search
- Enabling Keyword Search

Monitoring the Elasticsearch Cluster in Health Center

- Understanding Elasticsearch Dashboard
- Viewing the Cluster Dashboard
- Viewing the Cluster Dashboard

Additional Features

- Interacting with Elasticsearch
- Understanding DirectTransfer