

Support Update and Maintenance Strategies for all PeopleSoft Enterprise Applications

Session Goals

At the end of this session, you will:

- Understand the various releases delivered for Enterprise and EnterpriseOne
- Understand your maintenance options
- Be updated on our Support Organization
- Learn where to find your release information
- Complete your environment/product form

Agenda

Maintenance Strategies:

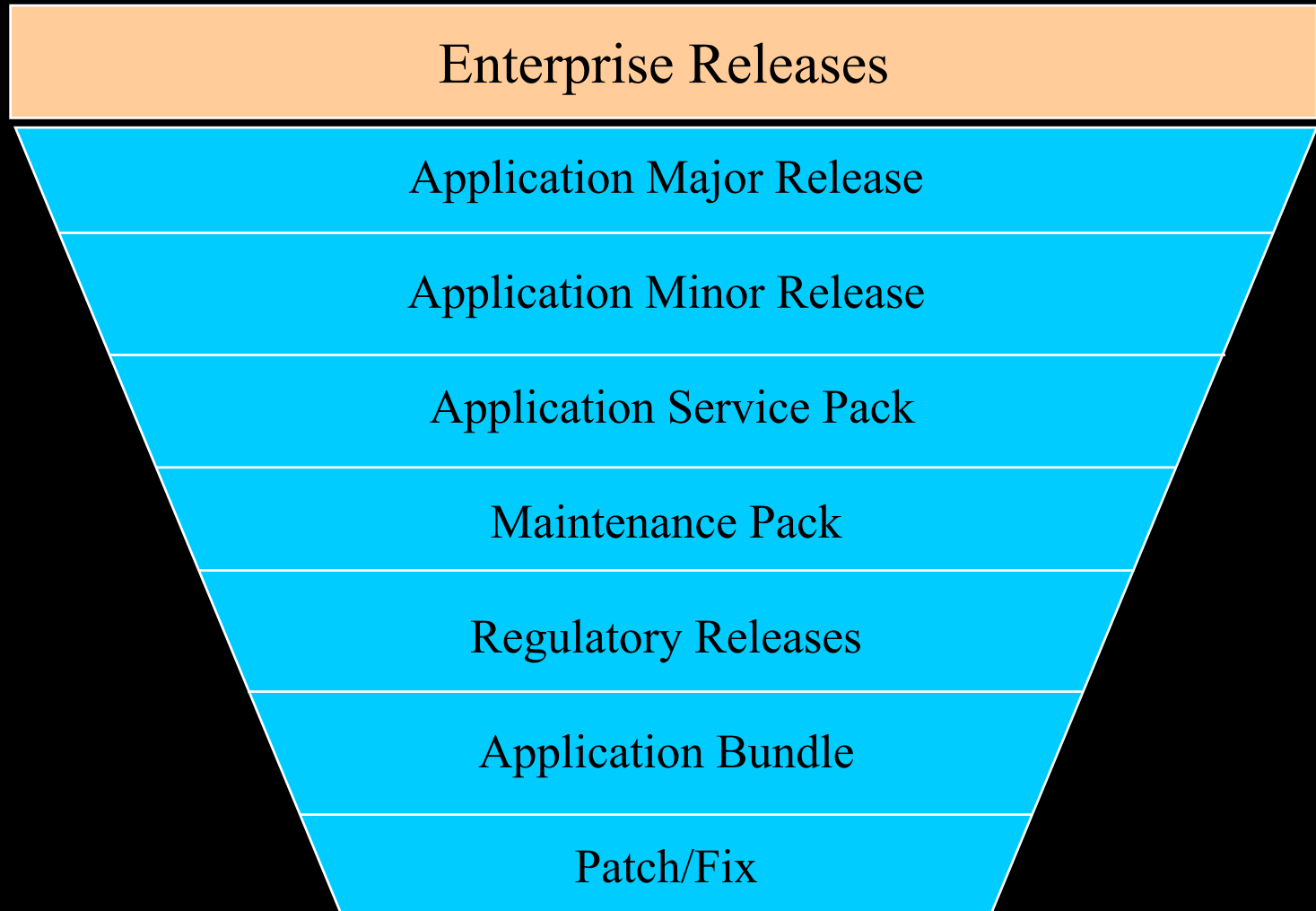
- Release Types
- Changes to Maintenance for New Peoplesoft Releases
- Release Considerations

Support Update:

- Support Highlights
- Product Roadmap
- Activity for you
- Questions

Maintenance Strategies

Enterprise Release Types Overview



Application Release Types

<i>Maintenance Type</i>	<i>Frequency</i>	<i>Contents and Delivery</i>
Major Release <i>(ex. Financials 8, HCM 8)</i>	2-4 years	Content: <ul style="list-style-type: none">• Major enhancements to all products within a Product Line.• New Tools release that delivers significant enhancement Delivery: Available on CD
Minor Release <i>(ex. Financials 8.4, HCM 8.8)</i>	12- 18 months	Content: <ul style="list-style-type: none">• New products, features and enhancements across some products Delivery: Available on CD

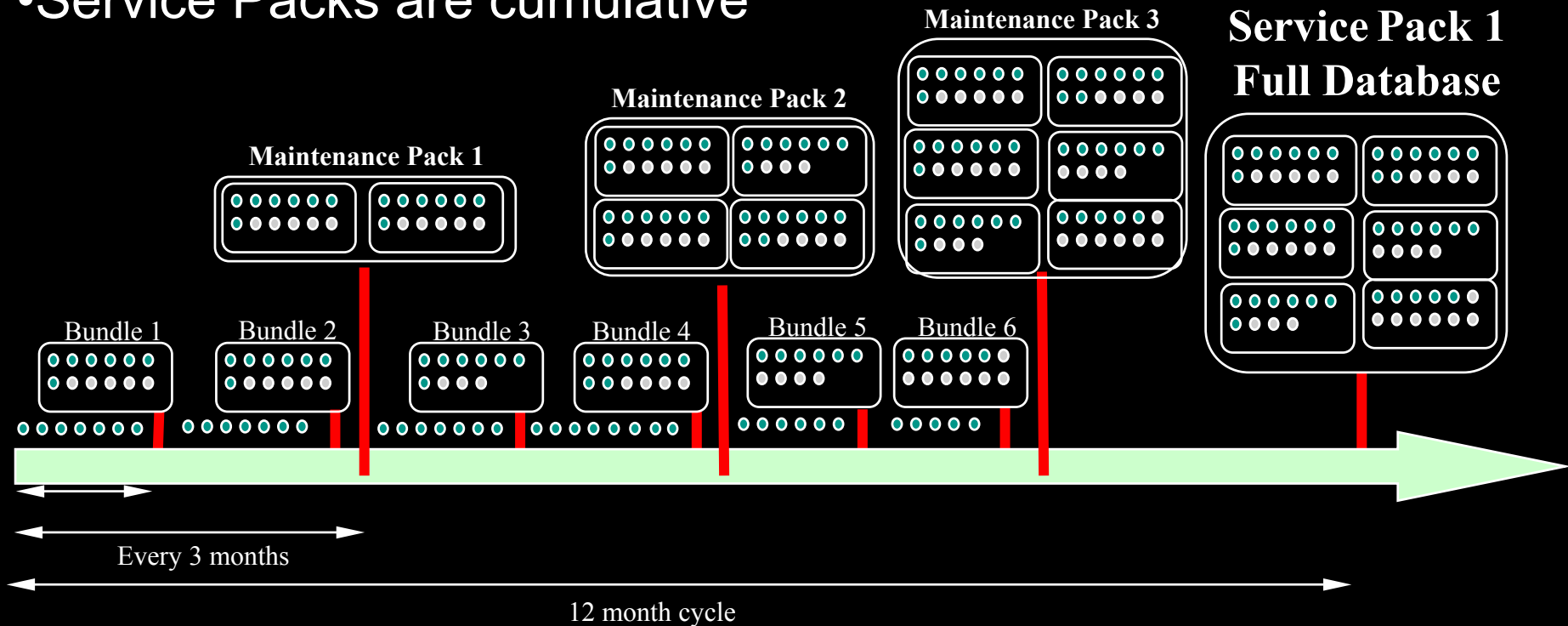
*Major and Minor releases are fully supported for 4 years

Maintenance Release Types

<i>Maintenance Type</i>	<i>Frequency</i>	<i>Contents and Delivery</i>
<i>Patch/Fix or SAR</i>	<ul style="list-style-type: none"> • As needed 	<p>Content:</p> <ul style="list-style-type: none"> • Single fix or small collection of fixes • Critical (P1) and escalated Urgent (P2) incidents <p>Delivery: Available on Customer Connection or Update Gateway (if applicable)</p>
<i>Application Bundle or ESU (ESUs delivered more frequently)</i>	<ul style="list-style-type: none"> • 6 weeks >30 incidents • 12 weeks < 30 incidents 	<p>Content:</p> <ul style="list-style-type: none"> • Collection of fixes for one functional area (ex. Product) • Posted critical (P1) and escalated urgent (P2) incidents plus additional P2 incidents <p>Delivery: Available on Customer Connection or Update Gateway (if applicable)</p>
<i>Maintenance Pack</i>	<ul style="list-style-type: none"> • Quarterly 	<p>Content:</p> <ul style="list-style-type: none"> • All posted maintenance (bundles and individual fixes) • Delta and cumulative content <p>Delivery: Available through Customer Care</p>
<i>Service Pack</i>	<ul style="list-style-type: none"> • 1 – 2 years 	<ul style="list-style-type: none"> • Content: All code changes made after GA release date • Delivery: CD

Rolling Code Line Model

- Bundles are a collection of fixes
- Maintenance Packs are both delta and cumulative
- Service Packs are cumulative



Three Maintenance Options

Enterprise Customers have three avenues to stay current with Application Fixes:

- ***Bundles***
- ***Maintenance Packs***
- ***Service Packs***

Customer Maintenance Strategies

- Proactive
 - Apply all posted fixes/SARS/bundles/ESU's or maintenance packs when available
 - PRO: Faster issue resolution and up-to-date system
 - CON: Higher resource commitment
- Selective
 - Apply only necessary updates
 - PRO: Reduced resource commitment; reasonably current
 - CON: Prerequisites may be an issue for future updates; slower issue resolution
- Reactive
 - Apply an update only after an issue is identified
 - PRO: Minimal resource commitment
 - CON: Slower issue resolution, fix may require many prerequisites

Maintenance Pack

- Name Change
 - Formerly called Fix Packs
- Maintenance Pack
 - Examples: Financials 8.4 SP1 Maintenance Pack 3, HRMS 8.3 SP1 Maintenance Pack 2
 - Latest release and previous release. Gradual introduction
 - Delta and Cumulative version for latest release
 - Delta version only for the previous release
 - Delivered every 3 months
 - Delivered on CD. Order through Customer Care

Maintenance Pack Availability by Release

Product Line	Release
Human Capital Management	8.3 SP1 (limited) 8.8 SP1 8.9
Financials	8.4 SP2 8.8 SP1
Supply Chain Management	8.4 SP2 8.8 SP1
Customer Relationship Management	8.8 SP1 8.9

Note: Multilingual version available for all Maintenance Packs

Regulatory Releases

- Payroll Tax Updates
 - Examples: Tax Update 01-A for E&G, Tax Update 03-D
 - To meet legislative requirements
 - Delivered 6 times per year
 - Posted to Customer Connection Updates & Fixes
- Financial Aid Updates
 - Examples: FA Regs 1 2003/04, FA Regs 2a 2003/04
 - To meet legislative requirements
 - Delivered 5 times per year
 - Posted to Customer Connection Updates & Fixes

Supportability Tools

PeopleTools 8.44 and beyond

Supportability Tools

Major Enhancements to Maintenance Process
provided by PeopleTools 8.44

- Change Packager
- Environment Management Framework
- Update Gateway
- Change Assistant

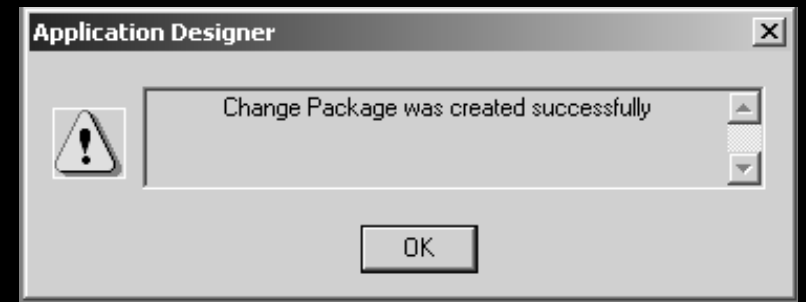
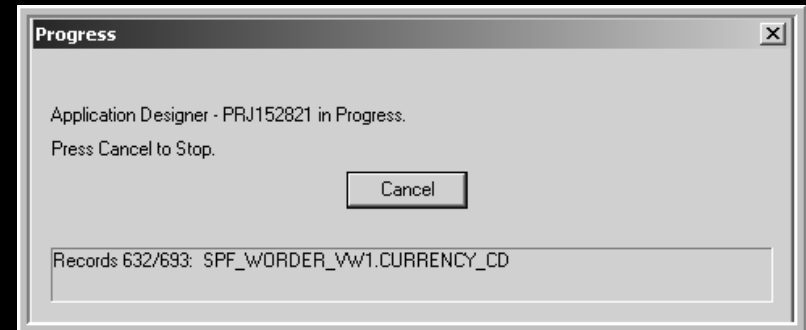
Supportability Tools

Change Packager

- Tool used by Peoplesoft to package fixes
- Automates packaging of fixes
 - Performs “Copy Project To File”
 - Includes batch files and documentation
 - Incorporates Incident Tracking information
- Enforces consistency across all fixes
- Also available to customers to manage and deploy customizations

Supportability Tools

Change Packager



Supportability Tools

Environment Management Framework

- Gathers PS installation and configuration information
- Can identify and view environment data on:
 - File Servers
 - Web Servers
 - Application Servers
 - Batch Servers
- Allows Change Assistant to apply changes to PS servers

Supportability Tools

Update Gateway

- Gathers installation information
 - Licensed products
 - Maintenance History (fixes previously applied)
- Recommends fixes still required for your particular environment
- Provides facility to download list of fixes to spreadsheet for analysis
- Provides ability to filter out fixes

Supportability Tools

Update Gateway

Candidate Updates

1 2 3 4 5

Scope: Find updates that have not yet been installed

Environment: Financials

Date Posted: 2003-07-15 - 2003-07-31

Update Type: All

Applications: eProcurement

Languages:

There are **6** primary updates that have met your search criteria.

There are **0** updates that are requisites of the primary updates.

Candidate Updates

[Customiz](#)

	<u>Update ID</u>	<u>Type</u>	<u>Description</u>	<u>Post Date</u>
EXCLUDE	131055	Primary	ePro 8 SP3: Unsaved requisition lines deleted after return from Direct Merchant	07/31/03 9:09PM
EXCLUDE	128000	Primary	ePro: The country code field value does not follow cXML or ISO standards for PO dispatching	07/30/03 9:02PM
EXCLUDE	130670	Primary	ePro: Denial of requisition workflow by ad hoc approver disrupts subsequent ePro workflow routings	07/30/03 5:29PM
EXCLUDE	129646	Primary	ePro: Wrong status message being reflected in the Manage Requisitions page.	07/22/03 8:14PM
EXCLUDE	129586	Primary	ePro: Special Request Description is only 60 Characters	07/18/03 12:21PM
EXCLUDE	129319	Primary	ePro: Vendor Lookup in ePro special request entry doesn't list states; allow search by city, limit by open for ordering	07/17/03 1:20PM

BACK NEXT CANCEL

Supportability Tools

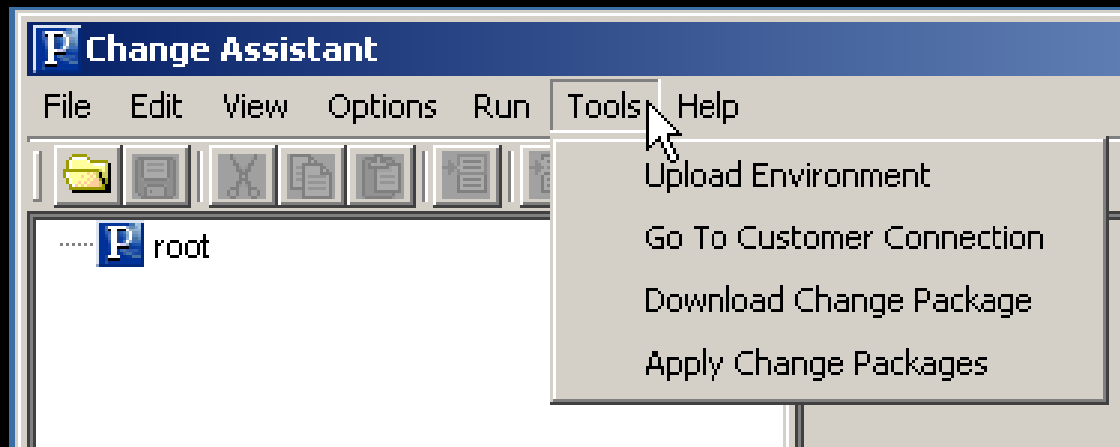
Change Assistant

- Single tool for managing all software updates for your system
- Interfaces with:
 - Environment Management Framework
 - Update Gateway on Customer Connection
- Automates the application of patches to all your Peoplesoft Environments
- Updates the maintenance history of your system

Supportability Tools

Four steps to maintaining your Peoplesoft system with the Supportability Tools:

- Upload Environment Data (to Customer Connection)
- Find Required Updates (using Update Gateway on Customer Connection)
- Download Updates (from Customer Connection)
- Apply Change Packages



Supportability Tools - Recommended by Release

Peoplesoft Enterprise Product Line	Maintenance Level	General Availability
Financials	8.4 SP2	March 31, 2004
Supply Chain Management	8.4 SP2	March 31, 2004
Human Capital Management	8.8 SP1 MP1	May 11, 2004
Customer Relationship Management	8.8 SP1 MP2	June 16, 2004

Why are the Supportability Tools recommended?

- Release was pre-existing when the 8.44 Tools were released in December of 2003
- Peoplesoft does not require customers to upgrade their Tool set.
- Supportability Tools are available if the customer chooses to upgrade to 8.44+ Tools
- Customer applications must be at the maintenance level defined above
- Manual application instructions delivered with Change Package

Supportability Tools - Required By Release

Peoplesoft Enterprise Product Line	Baseline Release or Maintenance Level	General Availability
Financials	8.8	December, 2003
Supply Chain Management	8.8	December, 2003
Customer Relationship Management	8.9	June, 2004
Human Capital Management	8.9	December, 2004

Why are the Supportability Tools required?

- Release developed and distributed with PeopleTools 8.44 and above
- All customers are on PeopleTools 8.44 or above
- Supportability Tools provide high quality maintenance to your systems

Changes to Enterprise Maintenance for New Releases

Which Releases do the Changes Apply?

Peoplesoft Enterprise Product Line	Baseline Release or Maintenance Level	General Availability
Financials	8.8	December, 2003
Supply Chain Management	8.8	December, 2003
Customer Relationship Management	8.9	June, 2004
Human Capital Management	8.9	December, 2004

Changes to Maintenance Strategy

<i>Enterprise – Old Strategy</i>	<i>Enterprise- New Strategy</i>
<p><u>Individual Fixes</u></p> <ul style="list-style-type: none">•Content: P1 and escalated P2 incidents•Frequency: As needed	<p><u>Individual Fixes</u></p> <ul style="list-style-type: none">•Content: P1 and escalated P2 incidents•Frequency: As needed
<p><u>Bundle</u></p> <ul style="list-style-type: none">•Content: All posted P1 and P2 incidents plus additional P2 incidents•Content Level: Product Bundles with the incident list as documentation•Frequency: every 6 weeks or 12 weeks depending on volume	<p><u>Bundle</u></p> <ul style="list-style-type: none">•Content: All posted P1 and P2 incidents plus additional P2 incidents•Content Level: Bundles by Product Group with Release Notes•Frequency: every 6 weeks or 12 weeks
<p><u>Maintenance Pack</u></p> <ul style="list-style-type: none">•Content: All bundles and posted fixes.•Frequency: Quarterly•Delivered in delta and cumulative format	<p><u>Maintenance Pack</u></p> <ul style="list-style-type: none">•Content: All bundles and posted fixes.•Frequency: Quarterly•Delivered in delta and cumulative format
<p><u>Service Pack</u></p> <ul style="list-style-type: none">•Content: All posted changes since GA or last Service Pack	<p><u>Service Pack</u></p> <ul style="list-style-type: none">•Content: All posted changes since GA or last Service Pack
<p>•Frequency: ~Every 12 months</p>	<p>•Frequency: ~Every 12 months</p>

Product Group Bundles

Financials Bundles	SCM Bundles	CRM Bundles	HCM
Financials: GL, AP, AR, Deduction Management, Asset Management, Treasury, eSettlements	SRM: Purchasing, ePro, sPro, Strategic Sourcing, Catalog Management	All products in one bundle	Just announced, changes to start with HRMS 8.9 (no change to CS)
ESA: Contract, Expenses, Projects, Resource Management, Mobil T&E, Pay Bill, Program Management	Customer Fulfillment: Order Management, Billing, Product Configurator, Trade Promotions		
Global Components	Inventory Management		
Staffing Front Office	Planning Products and Manufacturing		

Release Considerations

Maintenance Options – FSCM 8.8

Bundle Approach (Note –bundle includes AM, GL, AP, Cash)

- Bundle 1 (303450) posted 9/9/04
- Bundle 2 (576575) posted 6/30/04

----- 8.8 SP1 -----

- Bundle 1 (572129) posted 11/11/04
- Bundle 2 (583599) posted 12/23/04
- Bundle 3 (590456) posted 2/2/05
- Bundle 4 (597278) posted 3/16/05

Maintenance Options – FSCM 8.8

Bundle Approach cont'd (Note –bundle includes PO)

- Bundle 1 (300008) posted 6/30/04 (pre-req is MP1)

----- 8.8 SP1 -----

- Bundle 1 (586999) posted 11/10/04
- Bundle 2 (593306) posted 12/22/04
- Bundle 3 (599358) posted 2/2/05
- Bundle 4 (603813) posted 3/16/05

Maintenance Options – FSCM 8.8

Maintenance (MP)/Service Pack (SP) Approach

- SP1 (not bundle equivalent)

OR

- MP3 Cumulative (586760)

----- 8.8 SP1 -----

- MP1 (597112) posted 1/21/05
- MP2 planned for 4/18/05

NOTE: FSCM 8.8 SP2 – on 'radar' but no commitment or dates at this time

Maintenance Options HRMS 8.8 SP1

Bundle Approach- by Product

Product	Bundle	Posted Date	Res ID
HR	1	1/19/04	133052
HR	2	3/18/04	146270
HR	3	5/25/04	150053
HR	4	7/7/04	147944
HR	5	8/18/04	300223
HR	6	10/1/04	300225
HR	7	11/9/04	300228
HR	8	12/20/04	300233
HR	9	2/23/05	584244
HR	10	4/5/05	584252
HR	11	5/11/05	Planned

Maintenance Options HRMS 8.8 SP1

Bundle Approach- by Product – Cont'd

Product	Bundle	Posted Date	Res ID
Benefits	1	3/18/04	122965
Benefits	2	7/1/04	152683
Benefits	3	11/2/04	157788
Benefits	4	2/16/05	591773
Benefits	5	4/22/05	Planned
eBenefits	1	2/27/04	142368
eBenefits	2	5/20/04	152706
eBenefits	3	11/24/04	305341
eBenefits	4	2/16/05	581517
eBenefits	5	5/18/05	Planned

Maintenance Options HRMS 8.8 SP1

Bundle Approach- by Product – Cont'd

Product	Bundle	Posted Date	Res ID
BenAdmin	1	3/4/04	135648
BenAdmin	2	9/27/04	152685
BenAdmin	3	6/17/04	Planned
BenAdmin	4	9/7/05	Planned
TL	1	1/14/04	143704
TL	2	4/13/04	149892
TL	3	5/27/04	149893
TL	4	8/8/04	157313
TL	5	12/18/04	304695
TL	6	2/23/05	582771

Maintenance Options HRMS 8.8 SP1

Maintenance (MP)/Service Pack (SP) Approach

- SP1 (not bundle equivalent)

----- 8.8 SP1 -----

- MP4 Cum (596492) posted 2/1/05

Support Update

Support Delivery Commitment: Continuity & Consistency

- Same interfaces: phone numbers & web
- Same people: support engineers, field support staff, management
- Same or better support commitments and policies
- Same systems and infrastructure

Support Scale – PeopleSoft

- 1,000+ support staff
- 350k service requests filed electronically
- 150k service requests over the phone
- 18M web knowledge transfers



Support Scale – Better Together

- 6,000+ support staff
- 1.25M service requests filed electronically
- 450k service requests over the phone
- 110M+ web knowledge transfers



Support Scale – Better Together

	PeopleSoft	Combined Company
Support Staff	1,000+	6,000+
Web Access to Knowledgebase	100,000+ Solutions	400,000+ Solutions
Global Support Centers	6	16
Local Language Support	9	27
Interoperability	Multiple Calls	Single Call
Escalations	Multiple Calls	Single, Integrated Process

ORACLE®

Innovative Support Award,
Software Service Professionals Association (SSPA),
2002 & 2004

WebStar Service Award
Software Service Professionals Association (SSPA),
2003 & 2004

3 Awards at the 2003 IT Services Annual Conference
Most Influential IT Services Brand

Best Customer Service Organization
International Business Awards, March 2004

Best Support Organization
American Business Awards, May 2003



PeopleSoft®



**ISO 9001 Certification for
support worldwide since 1997**

**Rigorous ISO 9001:2001/TickIT
certification achieved in 2002**

**Support Center Practices
certification worldwide in 2004**

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Comprehensive Lifecycle Support

97% of Inquiries Addressed by KnowledgeBase



Award Winning Support Organization

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JDEdwards®
World

JDEdwards®
EnterpriseOne



Increased Resources for Customer Care

Support Integration With Key Third Parties

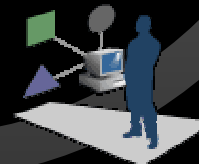


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Collaborative Support



Keep Current With Software Releases



Integration and Improvement: What You Can Expect

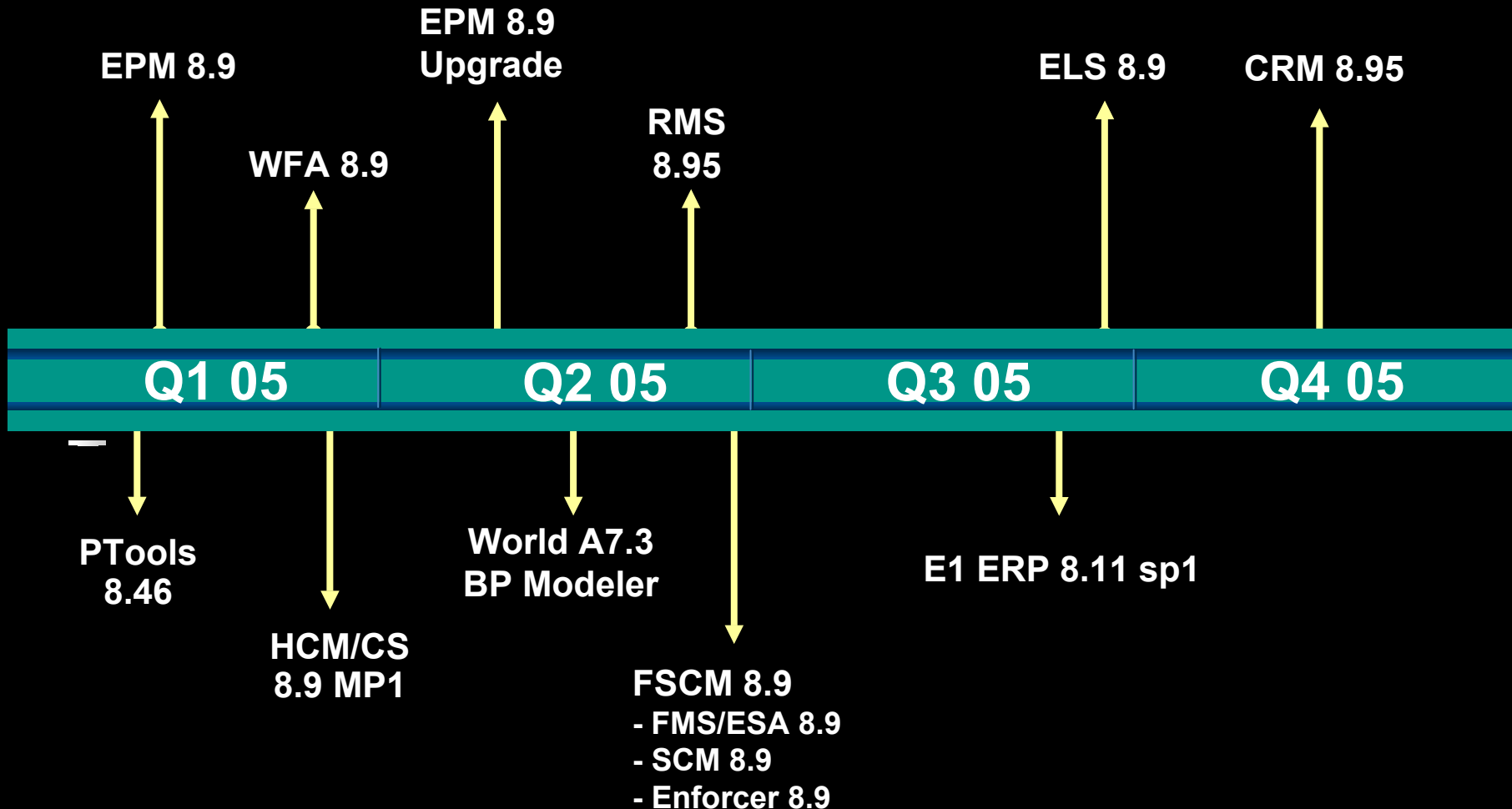
- Gradual integration of the support organizations
 - Maximize incremental customer value, prevent disruption
 - Infrastructure and backend-processes first
- Adopt best practices and capabilities from both organizations
- Continue current investments and roadmaps
- User-group and customer input
- Deliver the best Customer Support experience in the industry

Our Commitment

- No disruption to customer service
 - Continuity
 - Consistency
- Extend industry leadership in support and On Demand
 - Integration
 - Continuous improvement

Product Roadmap

CY 2005 Release Plan



CY 2006 Release Plan

Continue Enhancing Products

PeopleSoft Enterprise 9.0

JD Edwards EnterpriseOne 8.12

JD Edwards World enhancements

Oracle E-Business Suite 12



2006

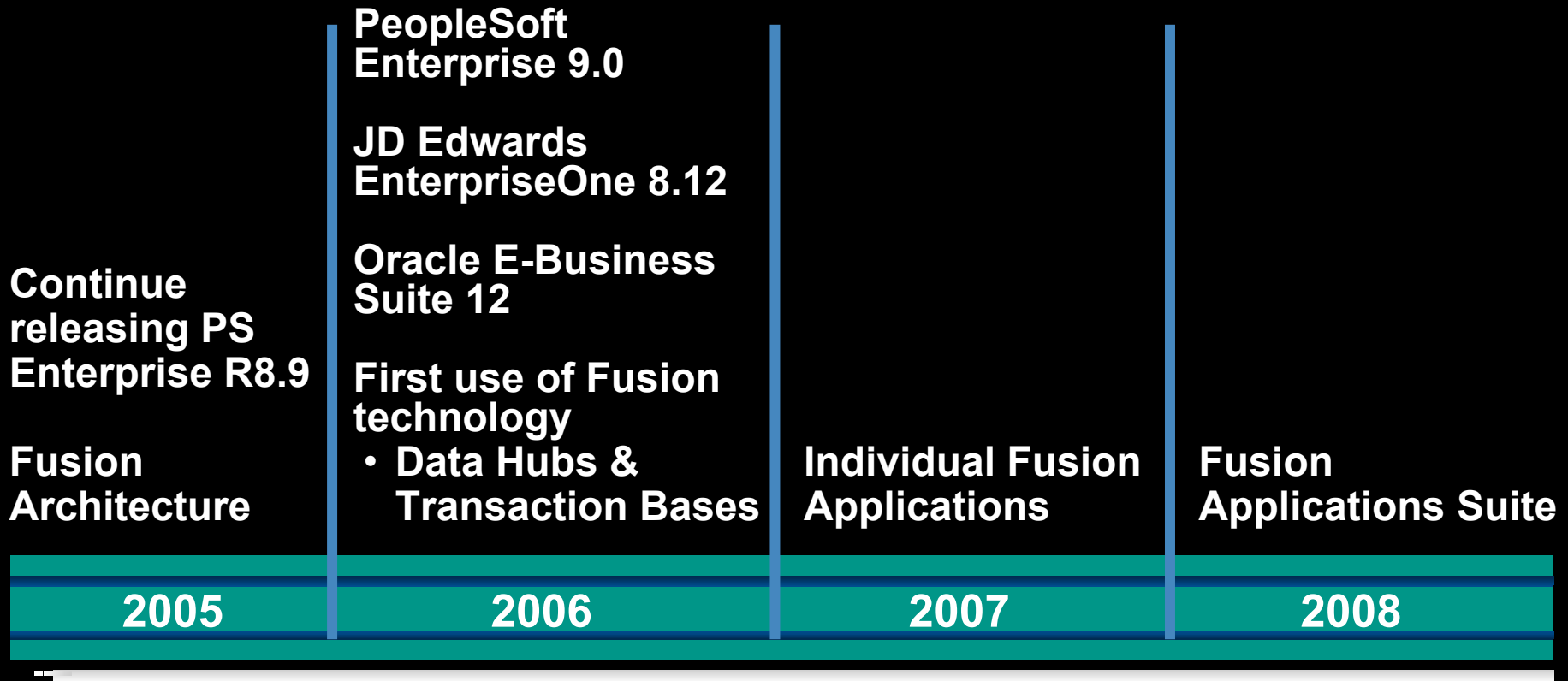
- New versions of PeopleSoft Enterprise, JD Edwards EnterpriseOne, and Oracle E-Business Suite
- Ongoing maintenance and regularly scheduled enhancements for JD Edwards World

Project Fusion

- Next generation of applications and architecture
- Better than the best of E-Business Suite, Enterprise, EnterpriseOne, and World product functionality
- Beginning with product certifications to Fusion Middleware and next releases of each product

Product Roadmap

→ JD Edwards World enhancements →



Oracle Announces Long-Term Support Commitment

- PeopleSoft products supported through 2013
- PSFT 9.0 and JDE 8.12 releases targeted for 2006
- Extension of support announced for
 - JDE EnterpriseOne XE & 8.0 support extended through 2/28/07
 - PSFT HRMS 8.0 SP1 support extended through 3/31/06
 - PSFT HRMS 8.3x support extended through 3/31/06
 - PSFT Financials 8.0 SP1 **upgrade** support extended through 12/15/06
- Other PSFT products will follow dates previously published by PeopleSoft.

Support Commitments

HRMS/Campus Solutions Update

- HR/CS 8.9 Released December 8, 2004
- HRMS/CS 8.9 Maintenance Pack 1 (MP1)
 - 8.9 GA plus MP1 CD (Delivered April 6, 2005)
 - Delta MP1 only CD (Available May 6, 2005)
- Upgrade scripts will require 8.9 MP1 & Tools 8.46
- New PeopleBooks have been created and are delivered with 8.9 MP1 Application
- ERDs and Table Loading Sequence Documents will be available May 18, 2005

HRMS/CS Support Summary by Release

	<i>HRMS 8.0 SP1</i>	<i>HR/SA 8.0</i>	<i>HRMS 8.3</i>	<i>HRMS 8.8</i>	<i>HRMS & CS 8.9</i>
GA Date	12/15/2000	8/31/2001	11/2/2001	12/20/2002	12/8/2004
Patches & Fixes	Until 3/31/2006*	Until 8/31/2007*	Until 3/31/2006*	Until 12/20/2006	Until 12/8/2008
Upgrade Scripts	Until 3/31/2007*	Until 8/31/2007*	Until 11/2/2006	Until 12/20/2007	Until 12/8/2009
Tax & Regulatory Changes	Until 3/31/2007	Until 8/31/2007	Until 11/2/2007	Until 12/20/2008	Until 12/8/2010

*These dates are extensions to support dates, see release definitions for details.

NOTE: Information is accurate as of April 2005. Please refer to Customer Connection for the latest Service Pack/Maintenance Pack level, and support dates for each release.

Support Commitments

Financials & Supply Chain Update

- 8.9 Targeted for August 2005
- JFMIP certified for Financials 8.8
- Upgrade scripts - available Q4-2005
- Upgrade scripts will require Tools 8.46
- Financials 8.9 Statement of Direction, Release Value Proposition and Pre-release Notes have been created and are available on Customer Connection
- Financials 8.9 Release Notes will be available with GA
- New PeopleBooks targeted for delivery with Application Q4-2005

Financials/Supply Chain Support Summary

- Continued and consistent support until at least 2013
- Oracle is adopting PeopleSoft's previously published release retirement policies
 - E&G Financials/SCM 7.5 SP1 and 7.5 SP2 - 12/22/04
 - Financials/ESA/SCM 8.0 SP1 - 12/15/04 with Upgrade to 12/5/06
 - Financials/ESA/SCM 8.0 SP2 & SP3 - 6/29/05
 - Financials/ESA/SCM 8.4, 8.4 SP1, 8.4 SP2 - 3/22/06
 - Financials/ESA/SCM 8.8, 8.8 SP1 - 12/16/07

Note: Dates listed are for support for patches/fixes; in general - upgrades add 1 year; regulatory/tax updates add 2 years. NOTE: Information is accurate as of April 2005. Please refer to Customer Connection for the latest Service Pack/Maintenance Pack level, and support dates for each release.

Support Commitments

CRM Update

- CRM 8.9 Generally Available 6/23/04
- CRM 8.9 MP3 available on 4/14/05
(Both Delta and Cumulative)
- CRM 8.95 Targeted for later this year

CRM Support Summary

- Continued and consistent support until at least 2013
- Oracle is adopting PeopleSoft's previously published release retirement policies
 - CRM 8 – 6/27/05
 - CRM 8.1 - 12/21/2005
 - CRM 8.4 and 8.4 SP1 – 3/22/06
 - CRM 8.8 and 8.,8 SP1 – 12/26/06
 - CRM 8.9 – 6/23/08

Note: Dates listed are for support for patches/fixes; in general - upgrades add 1 year; regulatory/tax updates add 2 years. NOTE: Information is accurate as of April 2005. Please refer to Customer Connection for the latest Service Pack/Maintenance Pack level, and support dates for each release.

Support Commitments

EnterpriseOne Update

- EnterpriseOne 8.11 SP1 targeted for Q3 2005
- EnterpriseOne Tools 8.95 targeted for Q3 2005
- EnterpriseOne 8.12 Targeted for 2006
- EnterpriseOne 8.11 and 8.12 will be paths to Fusion

E1 Support Summary by Release

	<i>Xe</i>	<i>ERP 8.0</i>	<i>8.9</i>	<i>8.10</i>	<i>8.11</i>
GA Date	9/18/2000	6/11/2002	9/18/2003	6/21/2004	12/15/2004
Patches & Fixes	Until 2/28/2007	Until 2/28/2007	Until 9/18/2007	Until 6/21/2008	Until 12/15/2008
Upgrade Scripts	Most current release as of 2/28/2007	Until 6/11/2007	Until 9/18/2008	Until 6/21/2009	Until 12/15/2009
Tax & Regulatory Changes	Years of 2000-2006 until 2/28/2007	Years of 2002-2007 until 6/11/2008	Years of 2003-2008 until 9/18/2009	Years of 2004-2009 until 6/21/2010	Years of 2004-2009 until 12/15/2010

NOTE: Information is accurate as of April 2005. Please refer to Customer Connection for the latest Service Pack/Maintenance Pack level, and support dates for each release.

Activity for You

1. Review the information posted on Customer Connection
 - Access various links related to Upgrade/Pre-release/Release notes on Customer Connection
 - If you are not sure of an answer ask your Application Sales Manager
2. Determine your upgrade plans, engage your Application Sales Manager if needed.
3. Update your customer information with Oracle (use form provided at today's session)
 - Environment/licensed products
 - Upgrade Plans

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