

New Baseline Release Strategy

Background

CMS began to review issues regarding our Oracle bundle strategy as a post review of issues encountered with the posting of the HR Super-bundle and Campus Solution bundle 11. The scope of issue expanded to a broader review of the overall baseline release and update & fix strategy. Issues identified during those discussions include:

- Current process has CMS redelivering fixes in individual fixes, post-code freeze updates and baseline releases. This fix release redundancy leads to inconsistencies in the migration of these packages to individual campus environments.
 - Release 8.90.070 saw an increase in release application problems.
- Unordered fixes that lead to a highly variable campus environments leading to an increasingly difficult application support challenge.
 - Fixes do have pre-reqs, but general order and decision to apply fixes is variable campus to campus.
- Generally fewer issues in FIN than HCM.
 - Relatively large number of postings outside of the release for HCM in comparison to FIN (132 for HCM in CY 2007) (so, if had just a small number of fixes, reapplying those fixes, etc doesn't really make for a major issue, but in HCM we have a lot, and those fixes tend to be pretty significant as compared to FIN so we do)
 - FIN fixes are generally less impacting than HCM fixes (CS Bundles, etc)
- Baseline releases and "super bundles" are getting bigger and the time-to-apply requires significant campus downtime.
- Still need to maintain a timely delivery of Oracle CS Bundles to meet FA requirements

Proposed Change

Change approach from current baseline release process that redelivers all fixes released as interim updates to one that delivers changes only. Move into a "maintenance pack" process that is sequential in nature that builds on previous maintenance packs so that we do not need to re-apply changes continuously. Key attributes of the Maintenance Pack approach would be

- Keep the time-to-apply of any one MP to 4 hours (3 hour fix, 1 hour environment start/stop)
- Each Maintenance Pack would have as a pre-requisite the previous Maintenance Pack
- For SA, Maintenance Packs would be based around the major CS bundles (5 per year) and for FIN possibly around calendar/fiscal year-end requirements. These would be called "Scheduled Maintenance Packs" where CMS will predict and publish the posting dates for these 'Scheduled Maintenance Packs'

- Between Scheduled Maintenance Packs, CMS would review and post 'Unscheduled Maintenance Packs' to support any campus requirements outside of the CS Bundles. CMS would publish on Monday if there is intent to post an unscheduled maintenance pack by the Friday of that week to allow for campus planning. Friday posting is proposed date, but not final decision yet.
- Only one Scheduled or Unscheduled Maintenance pack would be posted per week, per application.
- Reported issues requiring fixes will only be delivered in the next Scheduled or Unscheduled Maintenance Pack.

CMS believes that the above approach will

- Eliminate a major cause of fix application issues do to fix redundancy.
- Reduce environment variability to simplify support issues.
- Reduce campus and central resources needed to test and process significantly fewer postings per yet
 - Theoretical max for all Maintenance Pack postings would be 52. This is about a 60% reduction in postings
 - Practical estimates for the number of Maintenance Pack postings would be closer to 40 or so

Proposed Fix flow for HCM based on published Oracle Release Dates

