

BEACON

The Choice of Experience.

Effective Application Management for PeopleSoft

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Agenda

- Introductions
- Current Environment
- Principles of Application Management
- Benefits of an Automated Application Management Strategy
- Case Studies

Is this your current environment?

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PeopleSoft environments are subject to change



Vendor Driven Changes from Oracle

- New Applications
- Patches
- Support Packs
- Upgrades



Compliance and Best Practices

- Compliance (COBIT, ITIL, COSO, IFRS)
- General Audit Requirements
- Federal, Provincial, and Municipal Regulations
- Industry Regulations



Business Process Changes

- Overcome Competition
- Improve Service
- Cost Reduction
- Improve Quality
- M&A

Challenges within the Current Environment

Vendor Driven Changes from Oracle



- Staying current with fixes / bundles
- Embracing and Managing change
- Conducting impact analysis
- Performing sufficient testing
- Performing technical migrations manually

Challenges within the Current Environment

Compliance and Best Practices



- Obtaining audit trail of steps in the change process
- Defining standard change processes
- Enforcing separation of duties in the change process
- Enforcing compliance processes

Challenges within the Current Environment

Business Process Changes



- Taking advantage of useful functionality within the system
- Struggling with performing sufficient testing before finalizing changes
- Having difficulty reaching consensus on what changes to make
- Lack a forum to discuss change

Agenda

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- Current Environment
- **Principles for Application Management**
- Benefits of an Automated Application Management Strategy
- Case Studies

Guiding Principles of Application Management



B E A C O N

1. Simplification
2. Standardization
3. Automation
4. Visibility / Transparency / Communication

Standardization

The screenshot displays the Newmerix Automate!Change application window. The main interface shows a migration path for 'Strong Demo' from 'DH89ODMO' to 'DH89ODEV'. The path consists of several steps: Execute Data Mover, Prepatch Snapshot, App Designer Copy From File, File Server Copy, App Designer Compare, Summary Diff/Amerge, Approval, App Designer Copy Between, File Server, and Execute Data. A yellow callout box points to the 'STR Demo Rev 2' icon in the top toolbar, stating: "Design different processes for patches, customizations, or emergency fixes". Another yellow callout box points to the 'App Designer Compare' step in the migration path, stating: "Visually design your change management processes". An 'Edit Migration Step' dialog box is open, showing the configuration for the 'App Designer Copy Between' step. The dialog includes fields for Tool, Name, and Icon, a description, and a table of arguments.

Name	Location	Value
-CT	source	\${DBTYPE}
-CD	source	\${DBNAME}
-CO	source	\${PSUSERNAME}
-CP	source	\${PSPASSWORD}
-TD	target	\${DBNAME}
-TO	target	\${PSUSERNAME}
-TP	target	\${PSPASSWORD}

Command line:
\${TOOLBIN}\pside.exe -CT \${DBTYPE} -CD \${DBNAME} -CO \${PSUSERNAME} -CP \${PSPASSWORD} -TD \${DBNAME} -TO \${PSUSERNAME} -TP \${PSPASSWORD} -PJC \${PROJ_NAME} -SS NO -SN NO -HIDE -QUIET -LF

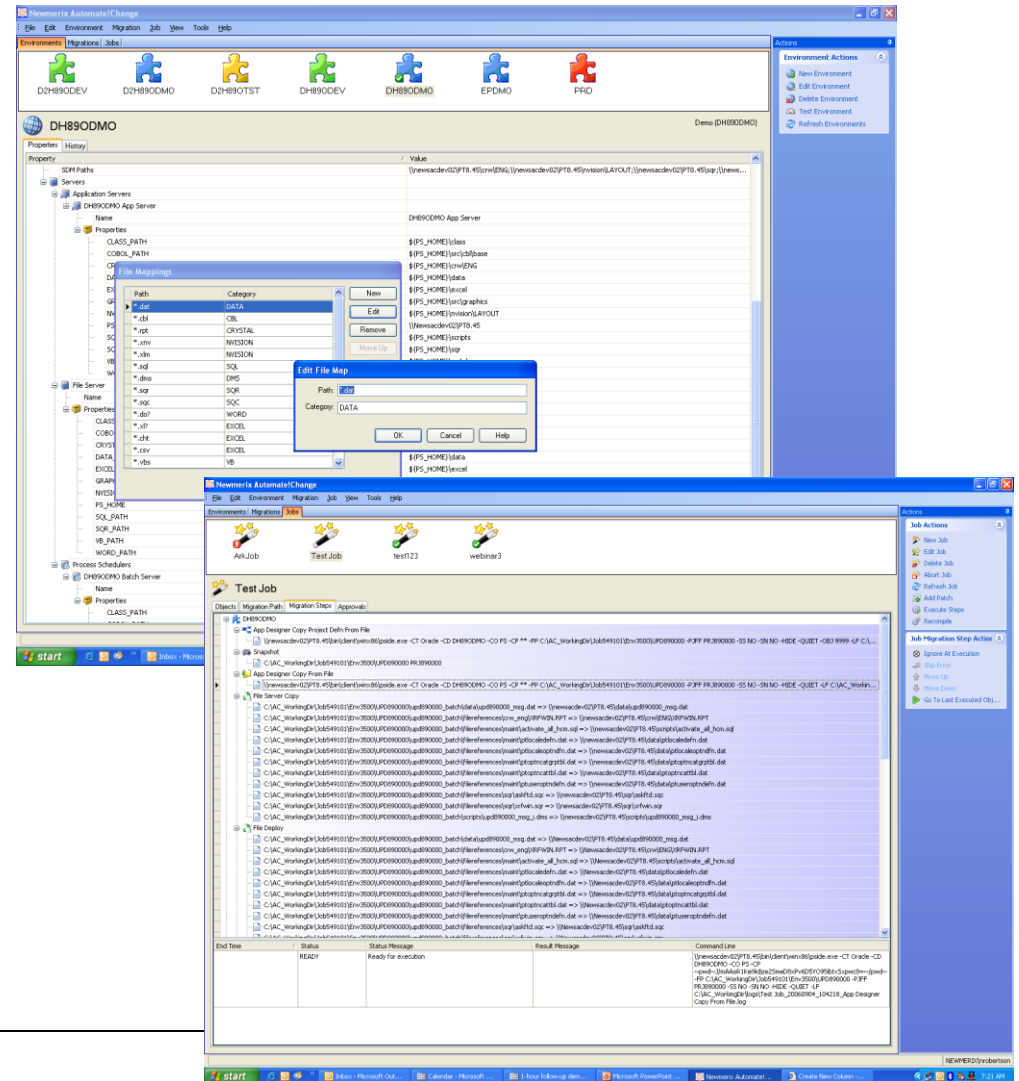
Automation

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- Automatically recognize which objects are in a patch/project and which steps need to be run

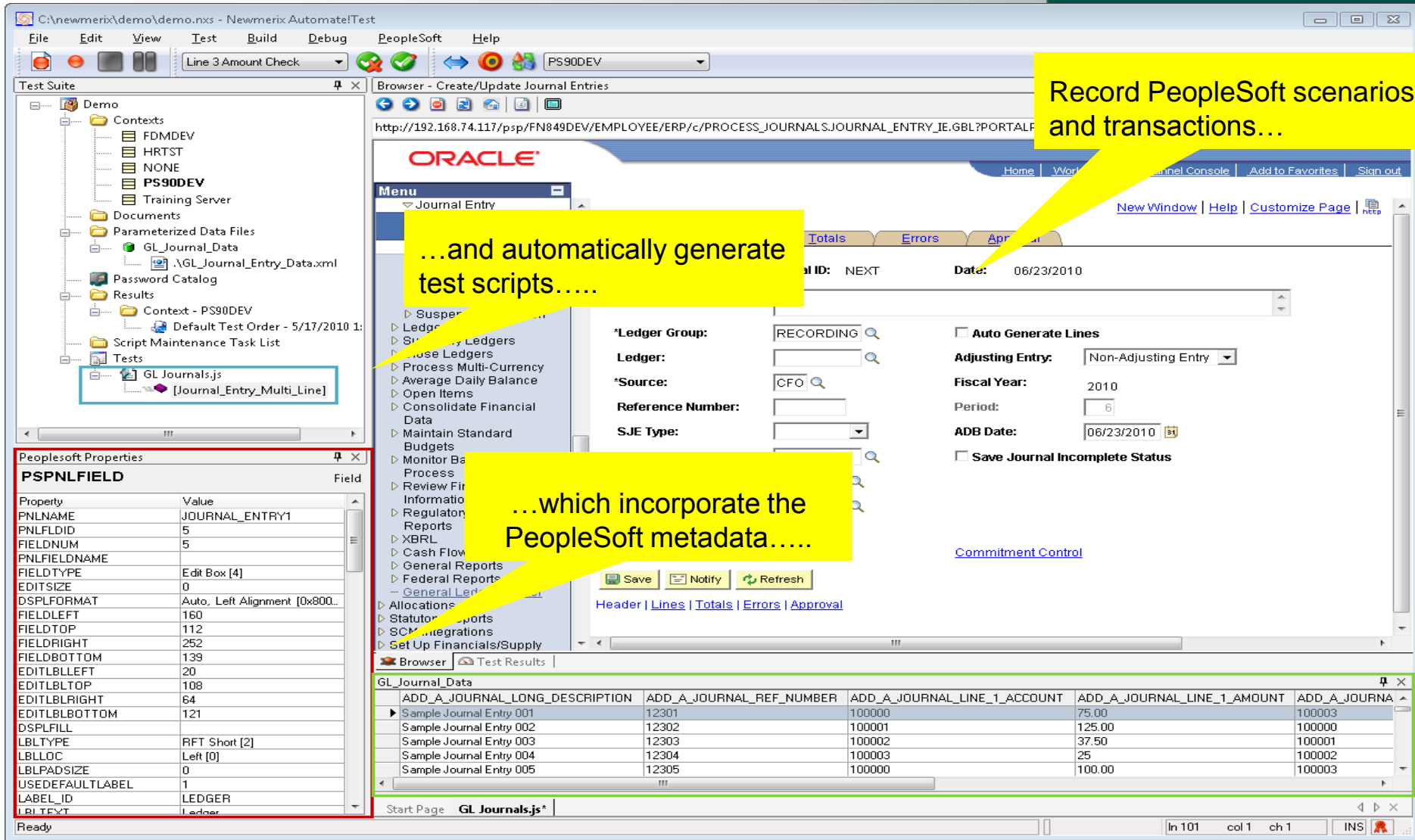
- Take snapshots of files and metadata before moving a patch/project to a new environment.

- Automate the process of deploying files to file servers, process schedulers and application servers.



- Automated testing:
 - Decrease testing time
 - Increase testing efficiency and effectiveness
 - Increase the breadth and frequency of testing
 - Provide auditable results
 - Associate end user documentation to a central location which is mapped to your change request.

Automation



The screenshot displays the Newmerix AutomateTest interface. On the left, a 'Test Suite' tree shows a 'Demo' folder containing a 'Tests' sub-folder with a file named 'GL Journals.js' and a sub-entry '[Journal_Entry_Multi_Line]'. The main window shows a PeopleSoft 'Journal Entry' form with fields for 'Ledger Group' (RECORDING), 'Ledger', 'Source' (CFO), 'Reference Number', and 'SJE Type'. A 'Date' field is set to 06/23/2010. A 'Commitment Control' link is visible at the bottom. A table at the bottom of the browser window displays 'GL_Journal_Data' with columns for 'ADD_A_JOURNAL_LONG_DESCRIPTION', 'ADD_A_JOURNAL_REF_NUMBER', 'ADD_A_JOURNAL_LINE_1_ACCOUNT', 'ADD_A_JOURNAL_LINE_1_AMOUNT', and 'ADD_A_JOURNA'. The 'Peoplesoft Properties' window is open, showing a table of 'PSPNLFIELD' properties.

Property	Value
PNLNAME	JOURNAL_ENTRY1
PNLFLDID	5
PNLFLDNUM	5
PNLFIELDNAME	
FIELDTYPE	Edit Box [4]
EDITSIZE	0
DSPLFORMAT	Auto, Left Alignment [0x800...
FIELDLEFT	160
FIELDTOP	112
FIELDRIGHT	252
FIELDBOTTOM	139
EDITLBLEFT	20
EDITLBLTOP	108
EDITLBLRIGHT	64
EDITLBLBOTTOM	121
DSPLFILL	
LBLTYPE	RFT Short [2]
LBLLOC	Left [0]
LBLPADSIZE	0
USEDEFAULTLABEL	1
LABEL_ID	LEDGER
LBLTEXT	Ledger

Record PeopleSoft scenarios and transactions...

...and automatically generate test scripts.....

...which incorporate the PeopleSoft metadata.....

Automation



C:\newmerix\demo\demo.nxs - Newmerix Automate!Test

File Edit View Test Build Debug PeopleSoft Help

Line 3 Amount Check PS90DEV

Test Suite Demo

- Contexts
 - FDMDEV
 - HRTST
 - NONE
 - PS90DEV
 - Training Server
- Documents
 - Parameterized Data Files
 - GL_Journal_Data
 - Password Catalog
 - Results
 - Context - PS90DEV
 - Default Test Order - 6/23/2010 10:00:30 AM
 - Script Maintenance Task List
 - Tests
 - GL_Journals.is
 - [Journal_Entry_Multi_Line]

Task List

Source: PS90DEV
Target: PS90DEV
Default Test Order - 6/23/2010 10:00:30 AM
Tasks: 0 completed, 0 ignored, 6 total

	Component	Page	Record	Field	Reference	Property	Script	Test
		JOURNAL_ENTR...			PSPNLDEFN	LASTUPDDTTM	GL Journals.js	Journal_Entry_Multi...
		JOURNAL_ENTR...			PSPNLDEFN	LASTUPDOPRID	GL Journals.js	Journal_Entry_Multi...
		JOURNAL_ENTR...			PSPNLDEFN	VERSION	GL Journals.js	Journal_Entry_Multi...
I		JOURNAL_ENTR...	JRNL_PANELS_...	PB_RATE_DETAI...	PSPNLFIELD	LBLTEXT	GL Journals.js	Journal_Entry_Multi...
		JOURNAL_ENTR...	JRNL_PANELS_...	PB_SECONDARY	PSPNLFIELD	LBLTEXT	GL Journals.js	Journal_Entry_Multi...
		JOURNAL_ENTR...	JRNL_HEADER	TRANS_REF_NUM	PSPNLFIELD	FIELDUSE	GL Journals.js	Journal_Entry_Multi...

The fixed text of the label for this page field has changed. If the test script uses this label as an identifier (e.g. searching for it in a text checkpoint) the change may make references to the previous text invalid. If the label is not referenced there should be no effect on replay. View the code referencing this field. If the reference is a findByID or findElement command then the label will not be required in replay as objects are not found by their label. If the reference is a text checkpoint then the searched for value may need to be changed. Load the text checkpoint and compare the value to the new value on the page.

The fixed text of the label for this page field has changed. If the test script uses this label as an identifier (e.g. searching for it in a text checkpoint) the change may make references to the previous text invalid. If the label is not referenced there should be no effect on replay. View the code referencing this field. If the reference is a text checkpoint then the searched for value may need to be changed. Load the text checkpoint and compare the value to the new value on the page.

The setting to show this field as display-only has changed. If replay interacts with this field and it is no longer available, replay may encounter problems. Jump to references to this field and step through replay to ensure all replay steps can complete as intended.

Remove Ignore Mark Done Show Code Save Exit

Browser Test Results GL_Journal_Data Task List

Start Page GL_Journals.js

Script Maintenance comparison process complete. Entering Script Maintenance mode. SCRIPT MAINTENANCE MODE In 101 col 1 ch 1 INS

Tests that are impacted by changes to PeopleSoft are identified....

... and the script changes are presented to the users in easy-to-read descriptions

Visibility / Transparency / Communication



B E A C O N

- Regular status meetings with major stakeholders
- Insight into progress to plan
- Readiness review / sign-off

Visibility / Transparency / Communication



Automate!Control

Welcome Administrator

This Site

Site Actions

Home

- View All Site Content
- Automate!Change for PeopleSoft**
 - PeopleSoft Jobs
 - PeopleSoft Approvals
 - PeopleSoft Audit Report
- Automate!Test for PeopleSoft**
 - Test Results
- Documents**
 - Automate!Control Documentation
- Automate!Control Service Request Lists**
 - HR Service Requests
 - Financial Service Requests
 - PeopleSoft Test Request
- Recycle Bin

Financial Service Requests

Title	Assigned To
Apply Patch UPD890000	Bob
Hide Source field on Jnl Header Page	TIM
AR Aging Report	Bob
eSettlement Buyer Template	Sam
ERS Vouchers Not Creating	Bob
Workflow Approver Type Missing	Sam
External Accounts Error for Canadian Acct	Matt
Updates to Account Conversion and CNV unit test	Sam

Add new item

HR Service Requests

Title	Assigned To
Tax Updated 9e	Sam
Workflow Verifier doesn't add to the grid	Administrator
Error Msg Rcvd for Lack of Approval Amount- that is untrue	Matt
Add long description to PERSON Component.	TIM
Report APY6000 does not bring back any data	TIM
Workflow - Approval component - No prompt table for Res Type	TIM

Add new item

PeopleSoft Test Request

Title	Assigned To
Requisition to Voucher business process	Matt
Project Costing to Asset Management Interface	Bob
Journal Entry to Journal Post	Bob

Add new item

Calendar

- 6/25/2010 12:00 AM [Release Schedule](#)
Move to Production
- 7/2/2010 12:00 AM [Release Schedule](#)
Move to Production
- 7/9/2010 12:00 AM [Release Schedule](#)
Move to Production
- 7/16/2010 12:00 AM [Release Schedule](#)
Move to Production
- 7/23/2010 12:00 AM [Release Schedule](#)
Move to Production
- 7/30/2010 12:00 AM [Release Schedule](#)
Move to Production
- 8/6/2010 12:00 AM [Release Schedule](#)
Move to Production
- 8/13/2010 12:00 AM [Release Schedule](#)
Move to Production
- 8/20/2010 12:00 AM [Release Schedule](#)
Move to Production
- 8/27/2010 12:00 AM [Release Schedule](#)
Move to Production

(More Events...)

Add new event

Links

- PeopleSoft Financials Development Environment

Add new link

Establish central repository for all information based on security

Visibility / Transparency / Communication



Automate!Change: Job Details - Microsoft Internet Explorer

Address: http://vapmdemo/_layouts/nmx/custom/JobDetails.aspx?ID=510564

Automate!Control Administration Help About

Job Details: Job with Warning

newmerix

Go Back

Name: Job with Warning
 Description:
 Status: WARNING
 Start Time: 6/13/2006 3:22:05 PM
 End Time: 6/13/2006 3:36:29 PM

Migration steps


Name	Description	Status	Start Time	End Time	Executed By
Environment: D1H890DMO					
App Designer Copy Project Defn From File	Use App Designer to copy project defn only into DB from file	SUCCESS	6/13/2006 3:22:05 PM	6/13/2006 3:22:21 PM	NEWMERIX\mDavis
Snapshot	Snapshot	SUCCESS	6/13/2006 3:22:21 PM	6/13/2006 3:22:52 PM	NEWMERIX\mDavis
App Designer Copy From File	Use App Designer to copy project into DB from file	SUCCESS	6/13/2006 3:22:52 PM	6/13/2006 3:23:02 PM	NEWMERIX\mDavis
File Server Copy	Copy files from the AIC target environment working directory to the target environment file server	SUCCESS	6/13/2006 3:23:02 PM	6/13/2006 3:23:03 PM	NEWMERIX\mDavis
File Deploy	Deploy Files from the AIC working directory to the target environment application servers and process schedulers	SUCCESS	6/13/2006 3:23:03 PM	6/13/2006 3:23:05 PM	NEWMERIX\mDavis
Execute Data Mover	Execute Data Mover	SUCCESS	6/13/2006 3:23:05 PM	6/13/2006 3:23:07 PM	NEWMERIX\mDavis
SQL*Plus	Execute SQL script	SUCCESS	6/13/2006 3:23:07 PM	6/13/2006 3:23:08 PM	NEWMERIX\mDavis
A Manual Step	Some user interaction is required	WARNING	6/13/2006 3:23:08 PM	6/13/2006 3:28:14 PM	NEWMERIX\mDavis
Environment: D2H890DMO to D2H890DEV					
App Designer Copy Project Defn From File	Use App Designer to copy project defn only into DB from file	SUCCESS	6/13/2006 3:28:14 PM	6/13/2006 3:28:40 PM	NEWMERIX\mDavis
Summary Diff/Merge	Summary Diff/Merge	SUCCESS	6/13/2006 3:28:40 PM	6/13/2006 3:34:03 PM	NEWMERIX\mDavis
Approval	Approvals are required	Approval_Accepted	6/13/2006 3:34:06 PM	6/13/2006 3:34:31 PM	NEWMERIX\mDavis
Snapshot	Snapshot	SUCCESS	6/13/2006 3:34:32 PM	6/13/2006 3:36:28 PM	NEWMERIX\mDavis
App Designer Copy Between DBs	Use App Designer to copy project between DBs	SUCCESS	6/13/2006 3:36:29 PM	6/13/2006 3:36:29 PM	NEWMERIX\mDavis
File Server Copy	Copy files from the AIC target environment working directory to the target environment file server	SUCCESS	6/13/2006 3:36:29 PM	6/13/2006 3:36:29 PM	NEWMERIX\mDavis
Environment: D2H890DEV					
File Deploy	Deploy Files from the AIC working directory to the target environment application servers and process schedulers	SUCCESS	6/13/2006 3:36:29 PM	6/13/2006 3:36:29 PM	NEWMERIX\mDavis

Done Local intranet

Total visibility on all aspects of the process including actions, objects, steps, and users.

Visibility / Transparency / Communication

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 Automate!Control



Audit Report: New Item

Generate change management audit reports automatically.

 Save and Close |  Save |  Go Back

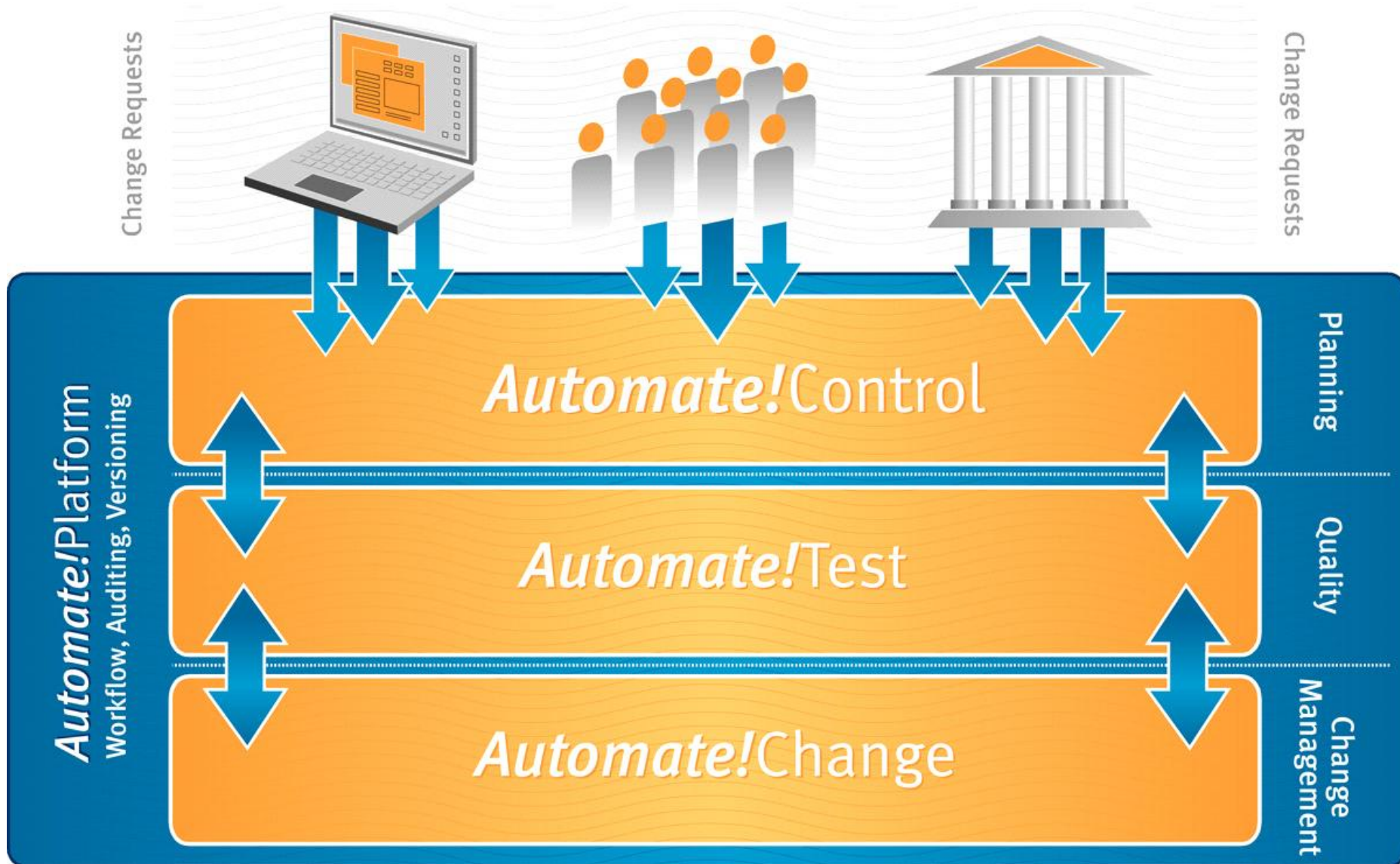
Title *	<input type="text" value="My Audit Report"/>
Category	<input type="text"/>
Environment	<input type="text" value="(None)"/>
Object Type	<input type="text" value="SQR"/>
Filename or Object Name	<input type="text" value="SQR"/> <input type="text" value="COBOL"/> <input type="text" value="PeopleCode"/> <input type="text" value="Component"/> <input type="text" value="Page"/>
PeopleSoft Action	<input type="text" value="Delete"/>
Username	<input type="text" value="(None)"/>

Agenda

- Introductions
- Current Environment
- Principles for Application Management
- **Benefits of an Automated Application Management Strategy**
- Case Studies

The *Automate!* Suite

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Benefits of automating application management

#1: IT/Biz Relationship

#2: Workflow Control

#3: Approvals

#4: Impact Analysis

#5: Separation of Duties

#6: Systematic Testing

**#7: Documentation/
Audit Reporting**

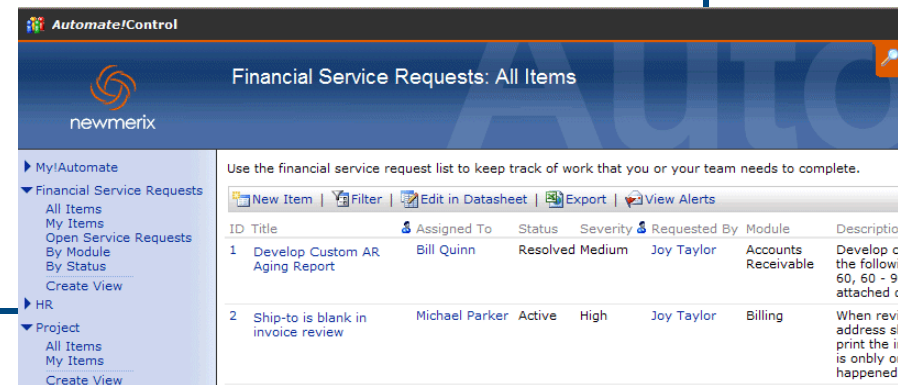
#1: IT/Business Relationship

Before

- Changes are communicated via emails, verbally at change control meetings, etc.—unauditable and unenforceable
- End users' service requests and enhancements enter a "black hole" with no way to track status or progress
- No automated method to centrally collect, categorize, prioritize, organize and track change requests

After

- All change requests routed and prioritized based on predefined policies
- End users can submit and view the status of service requests they've submitted, creating a two-way communication between business users and IT

The screenshot shows the Automate!Control software interface. At the top, it says "Automate!Control" and "newmerix". The main heading is "Financial Service Requests: All Items". Below this is a navigation menu with options like "My!Automate", "Financial Service Requests", "My Items", "Open Service Requests", "By Module", "By Status", "Create View", "HR", "Project", "All Items", "My Items", and "Create View". The main content area displays a table of service requests with columns for ID, Title, Assigned To, Status, Severity, Requested By, Module, and Description. Two requests are visible: 1. "Develop Custom AR Aging Report" assigned to Bill Quinn, status Resolved, severity Medium, requested by Joy Taylor, module Accounts Receivable. 2. "Ship-to is blank in invoice review" assigned to Michael Parker, status Active, severity High, requested by Joy Taylor, module Billing.

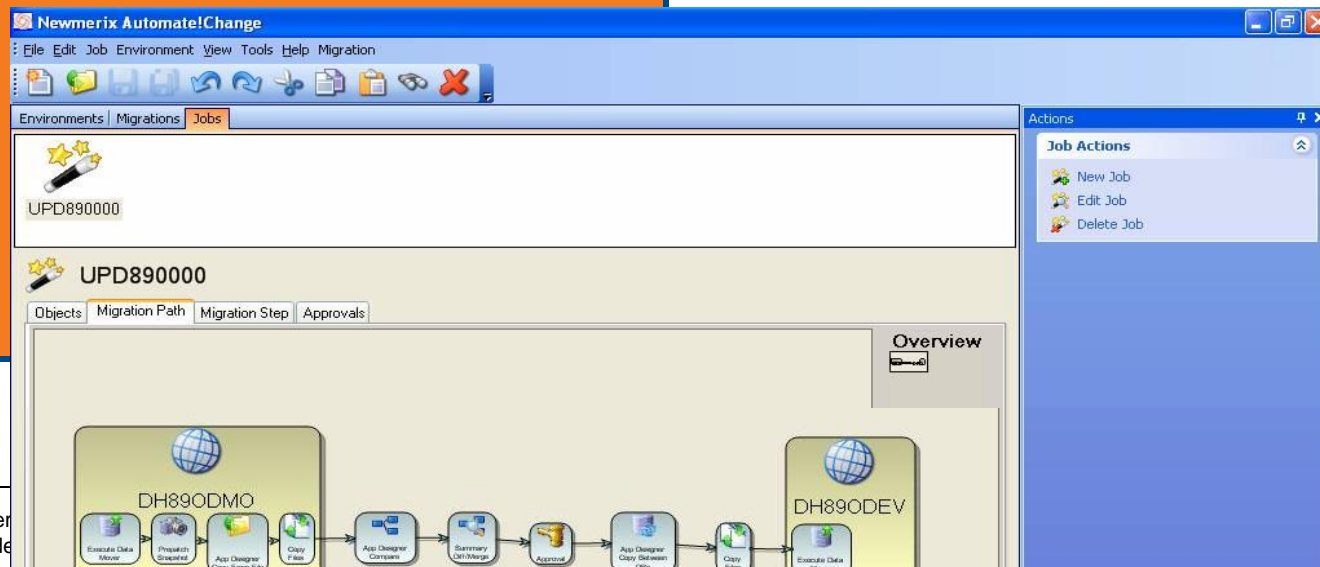
#2: Workflow Control

Before

- Change procedures are maintained via Word/Excel – prone to missed steps
- Change procedures are not enforceable, creating potential compliance issues

After

- Predefined change control workflows manage each step in the change process through each environment
- Different workflows can be established for different types of changes



#3: Approvals

Before	After
<ul style="list-style-type: none">■ Approvals communicated via emails, verbally at change control meetings, or in paper form — unauditible and unenforceable■ Changes can get to production without the required approvals	<ul style="list-style-type: none">■ All approval requests routed and prioritized based on predefined policies■ Changes are “locked down”—unable to complete migration until approvals are formalized with electronic signoffs and authentication

#5: Separation of Duties

Before	After
<ul style="list-style-type: none">■ Separation may be documented, but not enforced■ Each environment maintains separate access control■ Access control changes (new hires, terminations, etc.) must be updated for each environment■ Compliance is difficult to maintain	<ul style="list-style-type: none">■ Secure application enforces who can make changes in each application environment, who approves changes, and who migrates changes■ No overlap between duties

#6: Systematic Testing

Before	After
<ul style="list-style-type: none">■ Takes business users away from their “day jobs” and requires them to test the same business processes time and again■ Failed business processes can be missed due to human error■ Test frequency is limited by resource availability	<ul style="list-style-type: none">■ Tests can be recorded once, and run multiple times■ Automated testing accurately captures error messages, pop-up messages, etc. that may be missed in manual testing■ Over time, a robust test bed can be created that tests multiple data sets and variables■ Consistent testing quality across different testing cycles and resources

#7: Documentation & Auditing

Before

- Documenting changes is done via email, Word documents— is inconsistent and does not meet compliance mandates
- Document version control is usually using a naming convention for documents saved to a server.
- Establishing a change log during an audit means cobbling together database logs. This does not capture *why* the change was made

After

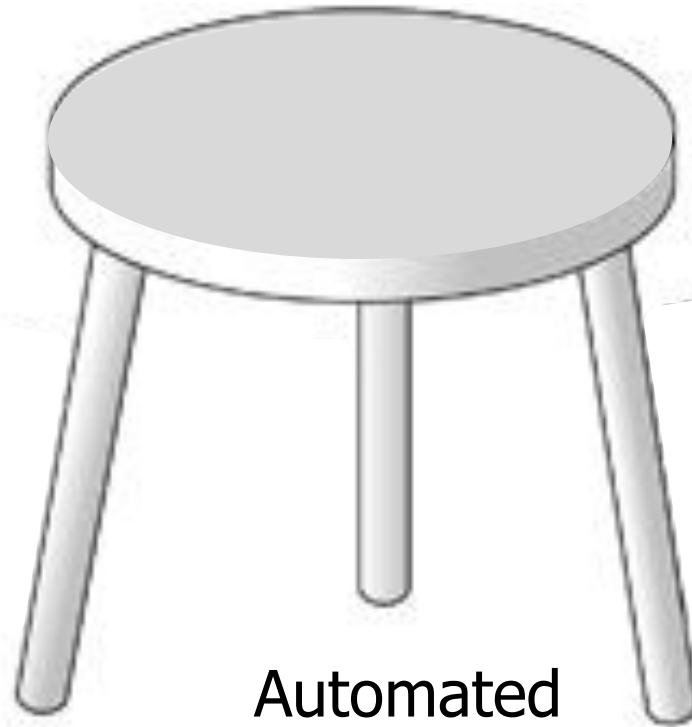
- All documentation gathered and versioned in a central repository
- Audit log tracks what changes were made to the application, when the change was made, who made the change, who approved it, who migrated it to production, etc.

PeopleSoft Object Change History PRD Environment



Object		Object Type			Reason
Version	Date	User	SR	Job	
PTDTWRK.CBL Cobol File					
1.1	6/24/2004	jtrown	SR125	CS Enhancement	enhancement for Customer Service
1.2	7/15/2004	jtrown	SR384	Cust Entry Bug	fixed bug in Customer Entry screen
1.3	8/31/2004	tcollins	SR732	Patch 12345	Apply Patch 12345
PTPSQLGS.CBL Cobol File					
1.1	8/31/2004	tcollins	SR732	Patch 12345	Apply Patch 12345
SYSOFTZN.SQC SQR File					
1.1	7/15/2004	jtrown	SR384	Cust Entry Bug	fixed bug in Customer Entry screen
1.2	8/31/2004	tcollins	SR732	Patch 12345	Apply Patch 12345
DBENCODE.SQC SQR File					
1.1	6/24/2004	jtrown	SR125	CS Enhancement	enhancement for Customer Service
1.2	7/15/2004	jtrown	SR384	Cust Entry Bug	fixed bug in Customer Entry screen

Principles of Managing Change



Commitment

Automated
Tools

Expertise

Agenda

- Introductions
- Current Environment
- Principles for Application Management
- Benefits of an Automated Application Management Strategy
- **Case Studies**

Case Study 1 – Implementation of Automated Testing

Goals

- Prepare for the planned upgrade to 9.1
- Provide a foundation for leveraging a broader usage of system functionality
- Implement a repeatable test process with cross-application/integration testing focused on mission critical processes
- Support centralized issue tracking and documentation

Implementation of Automated Testing

- Utility serving 900,000 customers, most in 2 states
- PeopleSoft HCM and Financials in Production
- Financials: GL, AP, PO, PC, AM, AR, BI, Inv
- Live for 10 years
- Steady state support
- Version 8.8

Case Study 1 – Implementation of Automated Testing

Challenges

- Manual testing procedures
- Inconsistency in the depth and breadth of testing across applications
- Inconsistency in approach, execution and documentation
- Limited cross application testing
- Issue tracking system limited in capability and focused on bug fixes

Case Study 1 – Implementation of Automated Testing

Solution – Implement Automate!Test

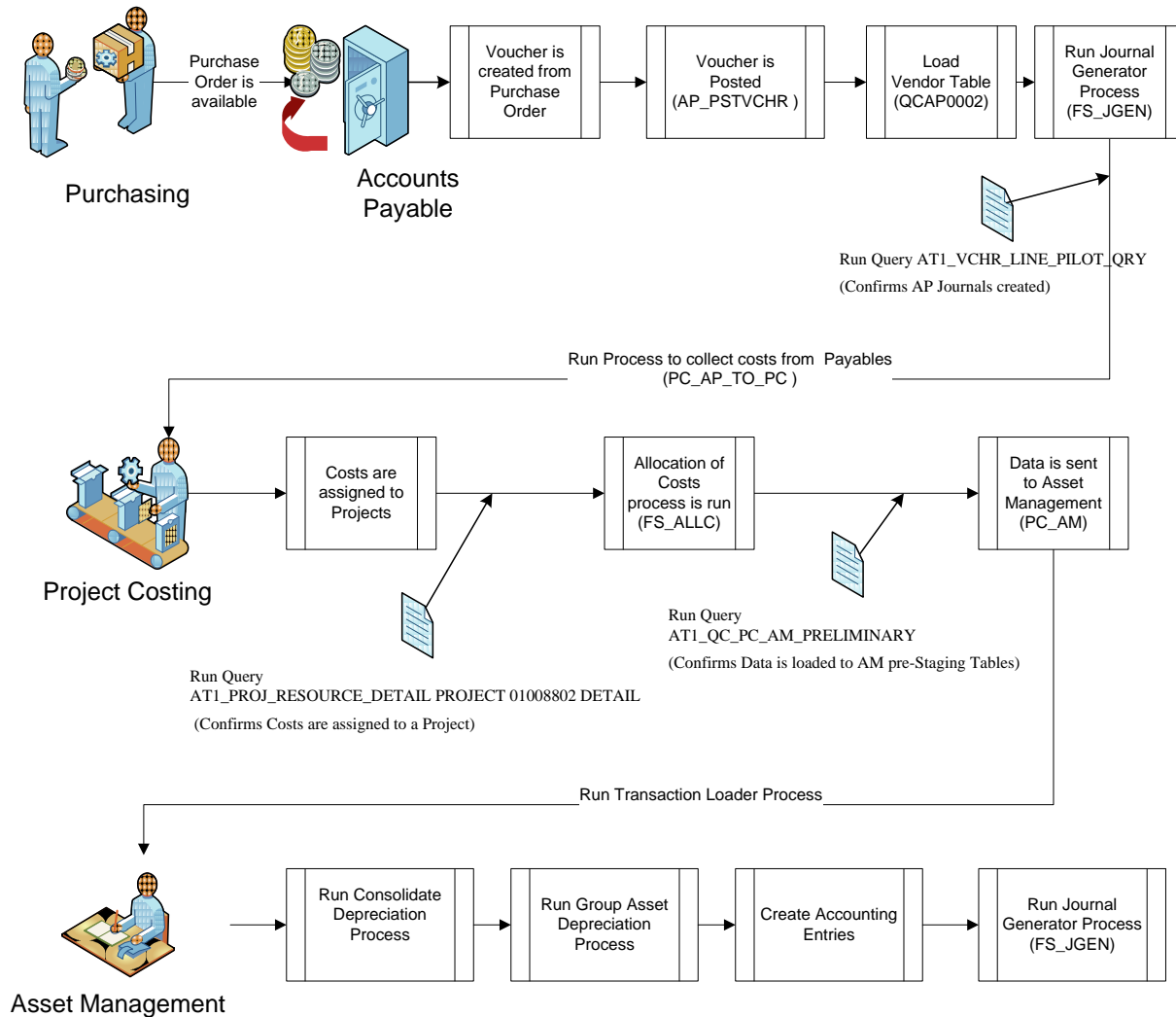
1. Pilot an industry-critical cross-module business process (Capitalizing Assets)
2. Develop scripts for AP and AM
3. Train end users in executing the AP and AM scripts
4. Build out the scripts for remaining modules

Case Study 1 – Implementation of Automated Testing

Solution – Implement Automate!Test

- The pilot established standards, approach, nomenclature and a working model within the client's environment
- This proof of concept established the test foundation

Case Study 1 – Implementation of Automated Testing



Case Study 1 – Implementation of Automated Testing

Solution - Implement Automate!Test

- Developed AP/AM scripts jointly:
 - Beacon provided a template set of test scenarios
 - Client customized scenarios
 - Beacon and client jointly created automated test scripts and tested the process
- Promoted knowledge transfer, self sufficiency through formal/informal training and partnering closely on initial script development

Case Study 1 – Implementation of Automated Testing

Solution – Implement Automate!Control

- Centralized documentation and activity tracking
- Automate!Control provided activity management, tracking and reporting with direct integration to the detailed test results

Automated Testing in an Upgrade

- Financial Services Organization
- PeopleSoft HCM and Financials in production for 15 years
- Prior experience in upgrading the system
- Upgrading from 8.8 to 9.0
- Previous upgrades were technical in nature to remain current with little implementation of new functionality

Case Study 2 – Automated Testing in an Upgrade

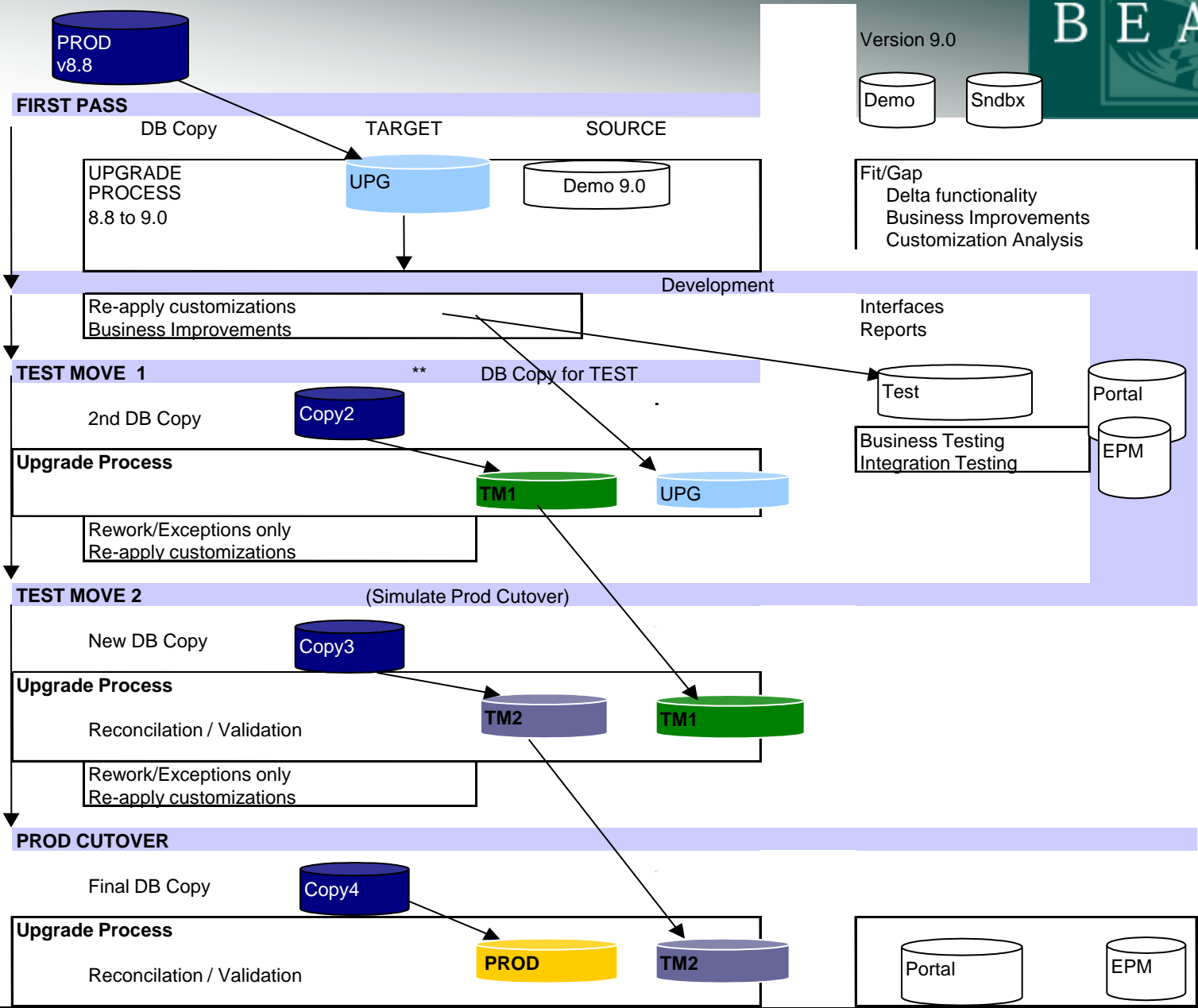
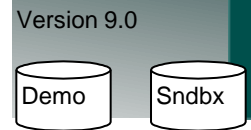
Goals

- User community looking for more business value in exchange for the time and effort expended on an upgrade project
- IT looking to streamline testing and validation and minimize user involvement where possible
- Establish a methodology and platform for future enhancements and improved overall system support
- Provide centralized issue tracking and documentation

Case Study 2 – Automated Testing in an Upgrade

Challenges

- Limited resources for upgrades, system support and enhancement projects
- Manual testing procedures
- Inconsistency in depth and breadth of testing, even within an application in some cases
- Limited cross module testing
- Upgrades require execution of validation processes multiple times



Case Study 2 – Automated Testing in an Upgrade

Solution – Implement Automate!Test and Automate!Change

- Developed and incorporated an automated regression test and quick, repeatable validation process into the upgrade project
- Relieved users of the manual burden of repeated test cycles and provided auditable results
- Consistency across applications in testing approach and documentation

Case Study 2 – Automated Testing in an Upgrade

Solution – Implement Automate!Test and Automate!Change

- Automated the manual configuration tasks
- Provided a test foundation to be leveraged for further enhancements and maintenance
- Automate!Change was implemented to standardize migration and control the production environment

For questions or a copy of the presentation:

David Pace

david_pace@beaconservices.com

Newmerix Account Representative

Beacon Application Services

508-663-4420

Beacon Application Services

Beacon Application Services, one of the original Oracle/PeopleSoft Services Partners, is a leading integrator of PeopleSoft enterprise application software. Over the past seventeen years, Beacon has successfully implemented, upgraded and supported over 300 PeopleSoft systems for organizations of all sizes.

The Newmerix Suite

The Newmerix product suite reduces the cost and complexity of managing the ongoing changes inherent in PeopleSoft ERP. Our solution results in greater visibility and control over the application lifecycle and improved business agility.

