Best Practices for staying current with PUM, PTF and Testing as a Service
Presenter Introductions

Randall Johnson
Vice President
randall.johnson@spearmc.com
(847) 507-7647

Tom Tretter
Managing Director
tom.tretter@spearmc.com
(314) 629-3618

Sneha Lattupally
Senior Consultant
sneha.lattupally@spearmc.com
(732) 210-8711
Agenda

1. Introduction to SpearMC
2. Polling Questions
3. PeopleSoft PUM Strategies
4. PTF Implementation and Deep Dive
5. Demo - PTF and SpearMC Test Evidence Reporting
About SpearMC

Founded in 2004, SpearMC specializes in:

- PeopleSoft FSCM, HCM, SCM, ELM, Grants, Campus Solutions
- Oracle Cloud Infrastructure
- PeopleSoft Managed Services (Technical / Functional Support)
- Training - PeopleSoft, PeopleTools and Hyperion
- PeopleSoft Testing as a Service
- PTF and Test Automation
- Hyperion, PBCS and EPM Cloud
- OBIEE / Oracle Analytics Cloud
- PeopleSoft and Hyperion Resell

© 2020 SpearMC Consulting
15 YEARS of Supporting Clients from Coast to Coast

2004
SAN FRANCISCO
SpearMC launches our first office in Rincon Hill

2010
SEATTLE
SpearMC expands in the Pacific Northwest

2014
DENVER
We celebrate 10 years and a new mile-high office

2007
CHICAGO
Our second location opens in the Windy City

2019
PITTSBURGH
The City of Bridges welcomes our eighth location

2015
PHOENIX
SpearMC grows in the Valley of the Sun

2016
DALLAS
The Lone Star State welcomes our sixth location

2018
WASHINGTON, DC
SpearMC celebrates 15 years with a new office and coast-to-coast presence

© 2020 SpearMC Consulting
Audience Poll
Polling Question #1

How current is your PeopleSoft ERP System?

A.) We are currently on PeopleSoft 9.2
B.) We stay within 1 release of the current version
C.) We are 2 or more releases behind but still on Oracle maintenance and support
D.) We are not current and stopped paying Oracle for maintenance and support
Polling Question #2

If you are on release 9.2 what PUM Image are you on?

A.) Between 1 - 21
B.) Between 22 - 24
C.) Between 26 - 29
D.) PUM 30 or higher
Polling Question #3

How familiar are you with PeopleSoft Test Framework?

A.) Never heard of it until now
B.) Vaguely familiar – I’ve heard of it
C.) My organization has discussed or tried implementing it in the past
D.) I am actively supporting it at my organization
PUM Overview

- **PeopleSoft Update Manager** (PUM) – Lifecycle Management tool to apply application maintenance. Main Menu > PeopleTools > Lifecycle Tools

- **PeopleSoft Update Image** (PI) – Application Maintenance is applied from the PI to a target environment. Oracle releases Images 4 to 5 times a year.

- **PeopleSoft Release Patchset** (PRP) – PRPs are critical fixes that cannot wait until the next image is posted and applied to a specific PI.

- **Proof of Concept** (POC) - Patches created for escalated, critical reasons and posted for a single customer. Applied directly and bypasses the PI.
PeopleSoft Roadmap

The State of PeopleSoft
Strong Customer Adoption Driven by Continued Investment and Long-Term Support

- 2030 support “through at least”
- 4x a year updates are delivered
- 12 – 18 rolling month roadmap
- >80% adoption rate
- ~5,000 customers worldwide
- 1,500+ new features delivered
“Selective Adoption”: Process in which PeopleSoft customers choose the maintenance updates and new features that they want to apply.

**Key Benefits:**

- Provides full control to Oracle customers vs past patch/fix strategies
- Apply what you want and need – supports flexible, Agile approach
- Delivers new features to business and IT more frequently (like Cloud/SAAS)
- Eliminates large scale upgrades (if executed properly)
- Better predictability for organization planning and budgeting
PUM Maintenance, Evaluation and Testing as a service (‘Taas’)

**TAAS Subscription Offerings (customized to your strategy)**

<table>
<thead>
<tr>
<th>Service</th>
<th>Deluxe Subscription</th>
<th>Platinum Subscription</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI Evaluation Report</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>PI Strategy</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>First Time PeopleSoft Update Manager Install</td>
<td>Additional fee</td>
<td>Included</td>
</tr>
<tr>
<td>PI Update Service</td>
<td>Annual</td>
<td>4X/year</td>
</tr>
<tr>
<td>Testing Execution</td>
<td>Included up to 200 Scripts</td>
<td>Included up to 1,000 Scripts</td>
</tr>
<tr>
<td>Test Script Maintenance</td>
<td>Included</td>
<td>Included</td>
</tr>
</tbody>
</table>

* Includes PeopleTools updates every 18 months
PEOPLESOFT ON OCI: CLOUDSHIFT™

SpearMC is the only Oracle Platinum Partner that can offer:

• One-Time PeopleSoft on OCI Sizing, Hosting and Lift-n-Shift OCI Services
• One-Time PeopleSoft Cloud Manager Configuration
• One-Year of PUM Updates and Tools Patching
• One-Year of Oracle University Cloud Learning Subscription
• PeopleSoft on OCI Training and All Access Learning Pass
RECENT SUCCESS STORIES

PUM and PTF/ TaaS Managed Services Clients

Hackensack Meridian Health
Largest Healthcare Provider in NJ

First Financial Northwest Bank
Financial Services Based in Renton, WA

Evergreen Health
Public Sector County Health Organization
PTF Introduction

Why use Test automation for PeopleSoft ERP?

✓ Oracle utilizes PTF to automate their PeopleSoft testing
✓ Cost effectively implement selective adoption and regulatory patches
✓ Enable more frequent PUM applications (additional business value)
✓ Standardize testing and results across all environments and releases
✓ Reduce cost and time for testing Production releases
  o New PUM Image and PeopleTools releases
  o Stage end-to-end data for Unit Testing
  o PeopleSoft Enhancements and Fixes
  o PeopleSoft Configuration changes
  o New PeopleSoft modules
  o Infrastructure Changes
PTF Implementation and Deep Dive into Tool
PTF Introduction

Some Test automation tools

- **PTF**: Part of PeopleTools, does understand PeopleSoft metadata. During application upgrade or customizations to the application PTF makes the related test case maintenance easy and cost effective by reporting the broken scripts. **No additional licensing cost** to use the tool

- **SELENIUM**: Not part of PeopleTools, does **not** understand PeopleSoft metadata. During application upgrade or customizations Selenium can not identify the broken scripts. The only way to identify the broken scripts is to run all scripts in the inventory. **Open source tool, no licensing cost** to use the tool, **built into PTF** - enhances PTF playback

- **QTP**: Not part of PeopleTools, does **not** understand PeopleSoft metadata. During application upgrade or customizations QTP can not identify the broken scripts. The only way to identify the broken scripts is to run all scripts in the inventory. **Licensing costs** are involved in using the tool.
PTF Implementation

1. Validate & Update Test Plans
2. Prep PTF Environment & Clients
3. Validate & Update Test Scripts
4. Validate & Update Shell Tests
5. Execute Test Library & Review Logs
6. Correct Issues & Maintain Test Assets

*Start with SpearMC test libraries for all PeopleSoft modules
Sample Client PTF Plan

- Implement HCM and FSCM PTF Script Library and End-to-End Scripts (~500)
- Upgrade to PeopleTools 8.57 and latest PUMs
- Migrate scrips & shells into new environments
- Outsource regression testing to SpearMC (annually)
- Perform annual ‘get-current’ program to latest images (SpearMC TaaS)
- Maintenance includes migration of scripts to Fluid UI

*Project Duration dependent on complexity and module scope

Total Effort = 10 Weeks
1. Select PTF Test environment (or host on OCI with SpearMC)
2. Configure PTF in Test environment
3. Install PTF client on developer machines (physical or virtual)
4. Ensure proper change controls exist to preserve Test assets
5. Select PUM / Tools upgrade environment for maintenance
6. Backup and migrate PTF test objects across environments
7. Run scripts to reset security and passwords for testing
Dedicated OCI Test Environment Benefits (Optional)

Consider OCI expansion for PUM & Tools Upgrade Preview & Testing

- Leverage PeopleSoft Cloud Manager with OCI
  - Earliest access to released images
  - Rapid Migration Path to stand up latest image
- Centralized Repository for all PTF Test Assets
- Clean Production Copy with latest PeopleSoft Functionality
  - Sensitive data masked with Data Privacy Framework
  - Key data encrypted with PeopleSoft Encryption Technology
- Metered Usage of OCI – Pay as You Go
- Provides a Proof of Concept for additional OCI Environments
  - Non-Prod (Dev, QA, Training)
  - Production
  - Disaster Recovery Backups
PTF Implementation and Deeper Dive into Tool
PTF works by replicating the actions of a single user executing functional tests against the PeopleSoft browser-based application.

Users can record manual test procedures and save them within the framework.

Users can execute those tests against the application to verify whether the application still behaves as expected.
PeopleTools Metadata

- When PTF records a test, it recognizes the metadata, the actual name of a field rather than the position of that field on a page.
- If the field is moved in a subsequent revision, PTF is still able to locate it when the test is executed.
- If field is added/removed/modified, audit reports will identify discrepancies between underlying objects and script metadata.
PTF collaborates with other PeopleTools

PTF tests can run processes and reports through Process Scheduler, as well as queries and Data Mover programs.
PTF Explorer User Interface

- Test Assets appear in a tree structure with collapsible folders for organizing test assets.
- Use of PTF Explorer:
  - Create tests and folders
  - Delete tests and folders
  - Copy and move tests
  - Rename tests and test cases
  - Navigate to and open test assets
  - Associate tests with Application Designer projects
PTF Editor Example

- Record and edit test steps.
- Add, copy, and delete test steps
- Create and edit test cases
- View both test and test case in a single view
- Debug tests.
PTF Shell Tests

- A shell test is a type of test that is meant to be used primarily to call other tests
  - Test.Exec - calling other tests.
  - DataMover.Exec - calling data mover scripts
  - Query.Exec - running queries
  - Variable.Set_Value - manipulating variables

<table>
<thead>
<tr>
<th>Seq</th>
<th>ID</th>
<th>Comment</th>
<th>Active</th>
<th>Scroll ID</th>
<th>Type</th>
<th>Action</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td>Variable</td>
<td>Set_Value</td>
<td>&amp;efft_date</td>
</tr>
<tr>
<td>2</td>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td>Variable</td>
<td>Set_Value</td>
<td>&amp;first_name</td>
</tr>
</tbody>
</table>
Log Details

- Execution Options
- Portal URL Info
- System Info
- Test Info
- Parent Folder
- Test Case Name
- Test Name
- Test Start: 7/31/2013 11:23:17 AM
- Result: Pass
- Message: Information message only.

- Step was successful.
- Step was successful, but with a warning.
- Step failed.
- The test encountered a condition that it was not configured to handle.
Test Report Overview and Objectives:

- SpearMC custom Test Log data reports - viewable as PDF files or online
- Provides test evidence for all PTF tests run in each test Cycle
- Designed to supports organization change control and audit requirements

Test Evidence Reports – Format and details:

1. **Test Summary Report** - Formatted log header & execution details
2. **Test Detail Report** - Log header and execution line details with screenshots
3. **Test Log Report** - Formatted listing of all log data
## Test Cycle Results and Reporting

![Pivot Grid chart](chart.png)

### Result (Count)

<table>
<thead>
<tr>
<th>Result (Count)</th>
<th>(Blanks)</th>
<th>FAILcount</th>
<th>FATALERRORcount</th>
<th>NONEcount</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>\MTAMBKA\PO</td>
<td>100.00%</td>
<td>1.11%</td>
<td>8.65%</td>
<td>31.04%</td>
</tr>
<tr>
<td>P2P_082019\AM</td>
<td>11.97%</td>
<td>0</td>
<td>1.77%</td>
<td>5.99%</td>
</tr>
<tr>
<td>P2P_082019\AP</td>
<td>14.86%</td>
<td>0.67%</td>
<td>2.22%</td>
<td>3.10%</td>
</tr>
<tr>
<td>P2P_082019\E-Pro</td>
<td>11.09%</td>
<td>0</td>
<td></td>
<td>2.22%</td>
</tr>
<tr>
<td>P2P_082019\GL</td>
<td>25.28%</td>
<td>0</td>
<td>2.66%</td>
<td>7.54%</td>
</tr>
<tr>
<td>P2P_082019\NV</td>
<td>12.42%</td>
<td>0.22%</td>
<td></td>
<td>2.00%</td>
</tr>
<tr>
<td>Users\VP1</td>
<td>7.10%</td>
<td>0.22%</td>
<td></td>
<td>4.88%</td>
</tr>
<tr>
<td>Users\VP1\Pavithra</td>
<td>0.44%</td>
<td>0</td>
<td></td>
<td>0.44%</td>
</tr>
</tbody>
</table>

---

© 2020 SpearMC Consulting
### Pivot Grid Drilldown

#### Detailed Data

<table>
<thead>
<tr>
<th>Parent Fld</th>
<th>Test Name</th>
<th>Result</th>
<th>Test Case</th>
<th>Tst Type</th>
<th>Stat</th>
</tr>
</thead>
<tbody>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_CRE A TE_REQUISIT ION</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_CRE A TE_REQUISIT ION</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_SEL_REQ ONLINE_CREATE_PO</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_ENTE R_ACTY_INF O__FOR_REQ</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_REVIE W_PO_CHAN GE_HISTORY</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_VIEW_COMPLETED_CNCL_REQ</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>\MTAMBA KE\PO</td>
<td>IN_PO_SEL_REQ BY_AUTO _REQ_PROC</td>
<td>121</td>
<td>DEFAULT</td>
<td></td>
<td>S</td>
</tr>
</tbody>
</table>
Drilldown to Test Level Details
Drilldown to Test Level Details

Object Not Found on Page
PTF Demonstration:
1. PTF Script Recording
2. SpearMC Test Evidence Reporting
Thank You.
Focus on Healthcare

SpearMC offers products and services that compliment and support Oracle applications.

- Labor Cost Distribution for Funded Research
- Transfer Pricing Agreements
- Effort Reporting for Grants
- Custom Financials Mapper for Growth and Acquisitions
- Billing Integration with Epic, Cerner, Kaufman Hall
- Hyperion Planning and PBCS integration with PeopleSoft
- PeopleSoft Clear Benefits

2018 HIUG Pillar Sponsor
If you are on 9.2, what PeopleTools release are you on?

A.) PeopleTools 8.58
B.) PeopleTools 8.57
C.) PeopleTools 8.56
D.) Below PeopleTools 8.56