
Enterprise PeopleTools 8.48 Upgrade

July 2006

Enterprise PeopleTools 8.48
Upgrade
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Contents

Preface

About This Documentation.....	.xi
Understanding This Preface.....	.xi
Audience.....	.xi
Organization.....	.xii
Typographical Conventions and Visual Cues.....	.xii
Related Information.....	.xiii
Comments and Suggestions.....	.xiii

Chapter 1

Plan Your Upgrade.....	1
Understanding the Planning Process.....	1
Organizing Your PeopleTools Upgrade.....	1
Reviewing Upgrade Step Properties.....	3

Chapter 2

Prepare Your Database.....	5
Understanding the Database Preparation.....	5
Updating Statistics.....	5
Running Initial Audit Reports.....	6
Understanding Running Initial Audit Reports.....	6
Run the Initial DDDAUDIT Report.....	6
Run the Initial SYSAUDIT Report.....	6
Run the Initial Alter Audit.....	7
Review the Initial Audits.....	11
Reporting Row Count for Tables.....	12
Verifying Upgrade User.....	13
Preparing Your Database	13
Understanding Database Preparation.....	14
Verify Database Integrity.....	14
Drop PeopleTools Tables.....	14
Shrink Images.....	15
Purge Message Queues.....	16

Delete Pagelet Wizard Data.....	16
---------------------------------	----

Chapter 3

Install the Software.....	19
Understanding the Installation Files.....	19
Installing the New Release	19
Understanding the New Release.....	20
Shut Down Servers.....	20
Save Customized Configuration Files.....	20
Backup PeopleTools Directories.....	21
Install Software from CD.....	21
Apply PeopleTools Patch.....	21
Set Up Application and Batch Servers.....	22
Set Up the Web Server.....	22
Set Up Pure Internet Architecture.....	23
Installing the Change Assistant.....	24
Creating a Change Assistant Job.....	24
Set Up Change Assistant.....	24
Set Configuration Manager Profile.....	25
Finalize Documentation.....	27

Chapter 4

Apply PeopleTools Changes.....	29
Understanding PeopleTools Changes.....	30
Performing Script Modifications.....	30
Understanding Script Modifications.....	30
Run a DBTSFIX Report.....	30
Edit the DBTSFIX Output Scripts.....	31
Edit the GRANT Script.....	32
Edit the PSLANGUAGES Script.....	32
Edit the TLSUPGNONCOMP Script.....	32
Edit the PTxxxTLS Scripts.....	32
Edit the DDLDB2 Script.....	33
Edit the DDLDBX Script.....	33
Edit the DDLORA Script.....	34
Edit the DDLIFX Script.....	34
Edit the MSGTLSUPG Script.....	34
Edit the Integration Broker Script.....	34

Edit Multilingual Step Properties.....	35
Updating PeopleTools System Tables	36
Understanding Updating PeopleTools System Tables.....	36
Clean Up Message Data.....	36
Update System Catalog Views.....	37
Update PeopleTools System Tables.....	37
Grant Privileges to the CONNECT ID.....	38
Update PeopleTools Patch Information.....	38
Rerun Update Statistics for DB2 zOS.....	38
Rerun RUNSTATS Report for DB2 UNIX NT.....	39
Rerun Update Statistics for DB2 UNIX NT.....	39
Rerun Update Statistics for Informix.....	39
Rerun Update Statistics for Oracle	39
Turning Off Change Control	40
Loading Model Definition Data.....	40
Understanding Model Definition Data Load Process.....	40
Load Model Definitions for DB2 zOS.....	40
Load Model Definitions for DB2 UNIX NT.....	41
Load Model Definitions for Oracle.....	41
Load Model Definitions for Informix.....	41
Load Model Definitions for Microsoft.....	41
Load Model Definitions for Sybase.....	42
Loading Message Data.....	42
Reviewing PeopleTools Objects.....	42
Exporting and Copying Projects	44
Understanding Exporting and Copying Projects.....	44
Export and Copy PPLTLS84CUR Project.....	44
Export and Copy PPLTLS84CURML Project.....	45
Export and Copy PPLTLSML Project.....	46
Export and Copy PPLTLS84CURDEL Project.....	47
Export and Copy PATCH84X Project.....	47
Export and Copy PATCH84XML Project.....	48
Populating Tablespace Data.....	48
Populate Tablespace Data.....	49
Update Tablespace Names.....	49
Building Updated PeopleTools Project.....	50
Generate Updated PeopleTools Script.....	50
Edit the Updated PeopleTools Script.....	50
Run the Updated PeopleTools Script.....	51
Migrating Records to New Tablespaces.....	51

Understanding Migration of Records to New Tablespaces.....	51
Export and Copy the PT84TBLSPC Project.....	51
Build the Tablespace Alter Script.....	52
Edit the Tablespace Alter Script.....	52
Run the Tablespace Alter Script.....	53
Loading Base Data.....	53
Loading Language Data.....	53
Populate Languages.....	54
Load Language Data.....	54
Loading PeopleTools Data.....	54
Load NonComparable Objects.....	54
Load English Messages.....	55
Load English String Data.....	55
Load Stored Statements Data.....	55
Loading PeopleTools Definition Group.....	55
Converting PeopleTools Objects	56
Update REN Server Configuration.....	56
Populate MCF Data.....	57
Convert Portal Objects.....	57
Convert Query Prompt Headings.....	58
Encrypt Connector Passwords.....	58
Load Conversion Data.....	58
Report Conversion Details.....	59
Run Data Conversion.....	59
Complete PeopleTools Conversion.....	59
Creating All Views	60
Converting Integration Broker.....	60
Understanding Converting Integration Broker.....	60
Updating Integration Broker Defaults.....	60
Creating Integration Broker Objects.....	61
Saving Application Messaging Objects.....	61
Exporting Node Transactions.....	61
Preparing Integration Broker Deletes.....	62
Deleting Application Messaging Objects.....	62
Deleting Node Transactions.....	62
Creating All Triggers.....	62
Regenerating Sync IDs.....	63
Updating Object Version Numbers.....	63
Backing Up After PeopleTools Upgrade.....	63

Chapter 5

Complete Database Changes.....	65
Understanding Database Changes.....	65
Updating Language Data.....	65
Understanding Updating Language Data.....	65
Run the TSRECPOP Script.....	65
Bootling Servers.....	66
Setting Up Security.....	66
Understanding Security.....	66
Synchronize CREF Permissions.....	66
Reviewing PeopleTools Functionality.....	68
Running the Final Audit Reports.....	69
Run the Final DDDAUDIT Report.....	69
Run the Final SYSAUDIT Report.....	69
Create the FNLALTAUD Project.....	70
Run the Final Alter Audit.....	70
Review the Final Audits.....	70
Reviewing Change Control.....	71

Chapter 6

Appendices.....	73
Understanding Appendices.....	73

Appendix A

Changing the User Interface.....	75
Change the User Interface.....	75
Change the User Interface for Mobile.....	77

Appendix B

Performance Tips and Techniques.....	79
Understanding Performance Tips and Techniques.....	79
Plan Your Upgrade for Performance.....	79
Improve Performance for Your Platform.....	79
Oracle.....	80
DB2.....	80
Consult the Global Support Center.....	80

Index81

About This Documentation

This preface discusses:

- Understanding This Preface
- Audience
- Organization
- Typographical Conventions and Visual Cues
- Related Information
- Comments and Suggestions

Understanding This Preface

This documentation is designed to direct you through the process of upgrading to your new PeopleSoft release.

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft documentation conventions.

Audience

This documentation assumes you have a basic understanding of the PeopleSoft system. One of the most important components of a successful upgrade of your PeopleSoft installation is your on-site experience.

You should be familiar with your operating hardware environment and have the necessary skills to support that environment. You should also have a working knowledge of:

- SQL and SQL command syntax.
- PeopleSoft system navigation.
- PeopleSoft windows, menus, and pages (and how to modify them).
- The World Wide Web.
- Microsoft Windows or Windows NT graphical user interface.

PeopleSoft recommends that you complete training before performing this upgrade.

See PeopleSoft Customer Connection (Oracle University).

Organization

This documentation is divided into chapters, each containing tasks that represent major milestones in the upgrade process. The chapter names are noted below:

- Plan Your Upgrade
- Prepare Your Database
- Install the Software
- Apply PeopleTools Changes
- Complete Database Changes

This documentation may also contain Appendices. When additional information is required to complete an upgrade task, you will be directed to the appropriate appendix.

Typographical Conventions and Visual Cues

To help you locate and understand information easily, PeopleSoft uses a few simple conventions in describing your interaction with the upgrade process.

Convention	Description
Monospace	Indicates messages you may receive during the upgrade process. Monospace also indicates examples of SQL scripts or queries you run during the upgrade, for example: <code>select distinct DDLSPACENAME from PSRECDEFN.</code>
<i>Italics</i>	Indicates a PeopleSoft or other book-length publication. We also use italics for <i>emphasis</i> and to indicate specific field values. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or panel.
ALL CAPS	File or directory names are represented with all caps; for example, BAT, BIN, CBLBIN.
Menu, Panel	Commas (,) between menu and panel references indicate that the panel exists on the menu. For example, select Use, Process Definitions indicates that you can select the Process Definitions panel from the Use menu.

Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press W.
Cross-references	See sections found at the end of a task or step refer you to additional documentation that will help you implement the task at hand. We highly recommend you reference this documentation. See Also sections refer you to additional documentation where there is more information regarding the subject. The title and section of the PeopleBook are separated by commas; the title of the PeopleBook is in <i>italics</i> .
Topic list	Contains a list of all topics in the section.

Note. Text in this format indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by Important!, the note is crucial and includes information that you need to perform for the system to function properly.

Related Information

PeopleSoft provides additional information that may help with your upgrade. The following information (as well as updates to our upgrade) is available on PeopleSoft Customer Connection:

- *Release Notes.* Read the release notes, prior to starting your upgrade, to determine what has changed in the system and to familiarize yourself with the new features. The release notes also indicate whether you need to upgrade any other portions of your system, such as your relational database management system (RDBMS) software or batch files.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

- *Updates and Fixes Database.* The updates and fixes database (Patch Fix Search page) on PeopleSoft Customer Connection will have other information posted after shipment of this release that may not be included in these instructions. If you find any items categorized as required at upgrade or installation, you should detach any associated files and be ready to implement them at the appropriate time.

See PeopleSoft Customer Connection (Update + Fixes, Required at Install or Upgrade).

Important! Before upgrading, it is imperative that you check the updates and fixes database on PeopleSoft Customer Connection for updates to the upgrade. We continually post new updates there.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleTools Product Documentation Manager, PeopleSoft, Inc.

4460 Hacienda Drive

Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Plan Your Upgrade

This chapter discusses:

- Understanding the Planning Process
- Organizing Your PeopleTools Upgrade
- Reviewing Upgrade Step Properties

Understanding the Planning Process

In this chapter, you will plan your upgrade and review step properties for the upgrade process.

Task 1-1: Organizing Your PeopleTools Upgrade

In this task, you gather documentation you will need for your PeopleTools upgrade.

Important! You should apply this upgrade to your Demo database before applying it to other environments. This ensures that your Demo database is up to date with the current PeopleTools release and provides an environment for additional testing.

Before you begin, review the following information to organize your Upgrade process:

- Review the PeopleTools Release.

Make sure to download the most recent version of the PeopleTools document.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts).

- Have your *PeopleTools Installation Guide* for your relational database management system (RDBMS) nearby.

The Installation guide contains useful information that can help you with your upgrade process.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes).

- Review the PeopleTools Release Notes.

Read the PeopleTools Release Notes, prior to starting your upgrade, to determine what has changed in the system and to familiarize yourself with the new features. The Release Notes also indicate whether you need to upgrade any other portions of your system, such as your RDBMS software or batch files.

Make sure you have the most current version of the Release Notes. We strongly encourage you to read the entire document before beginning the upgrade process. It is important to be aware of any new support policies as well as any new features.

Note. If you skipped any PeopleTools maintenance releases, download and read the Release Notes corresponding to the release(s) you skipped in addition to the Release Notes for this PeopleTools release.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

- Review Supported Platform information.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Implementation Guide, Supported Platforms).

Make sure your entire environment is still supported by PeopleSoft. Check all categories that apply to your workstations, servers, third-party software, and language preferences. Our support policies evolve to incorporate the newest releases of database software and third-party software. In some cases, when we move to support the most recent version of a particular product, we drop support for a previous version. Always make sure you are on a supported environment prior to beginning an upgrade.

- Download Required for Upgrade Fixes.

Before you start applying this upgrade, check the list of required fixes. It is very important that you download all fixes in the “required for upgrade” view for PeopleTools.

See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).

- Freeze Development.

Freeze development on your production database during this upgrade.

- Workstation Requirements

For the upgrade workstation, the suggested minimum RAM is 256 MB.

Important! You will need to use a supported Windows client workstation for your new PeopleTools release to upgrade.

- Performance Recommendations

Plan for performance issues before beginning your upgrade.

See Appendix: “Performance Tips and Techniques.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 1-2: Reviewing Upgrade Step Properties

When you open the upgrade template using PeopleSoft Change Assistant, you will see various properties for each step. PeopleSoft includes several of those properties in this upgrade documentation. At the end of each upgrade step, you will see a description of the properties used during that step. The following graphic provides an example of the information you will see in the upgrade documentation:

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Example of properties information

There are three possible descriptions of Database Orientation: *Source*, *Target*, and *Copy of Current Demo*.

- *Source* indicates that the step runs on the Source database. This is not applicable for PeopleTools-only upgrades.
- *Target* indicates that the step runs on the Target database. This is your upgrade database.
- *Copy of Current Demo* indicates that the step runs on the Copy of Current Demo database. This is not applicable for PeopleTools-only upgrades.

There are three possible descriptions you will see for Initial or MTP: *Initial* (Upgrade), *MTP* (Move To Production), or *Both*.

- *Initial* indicates that this step runs in the Initial pass of the upgrade only. This is not applicable for PeopleTools-only upgrades.
- *MTP* indicates that this step runs only in Move to Production upgrade passes. The step is not applicable to the Initial pass. This is not applicable for PeopleTools-only upgrades.
- *Both* indicates that this step runs in both the Initial and Move to Production upgrade passes.

Two descriptions can be seen for Products: *All* and specific product names.

- *All* indicates that you run the step regardless of which products you are upgrading.
- Specific product name(s) indicates that you run the step only if you are upgrading the product(s) specified. You will specify which products you are upgrading when you set up your Change Assistant job configuration.

The two possibilities for Platform descriptions are *All* and specific platform names.

- *All* indicates that you run the step regardless of which platform your database uses.
- Specific platform name(s) indicates that you run the step only if your database uses the specified platform(s). You specified which platform you are using when you set up your Change Assistant job configuration. The following are platform names that will appear:
 - DB2 z/OS
 - DB2 UNIX/NT
 - Informix
 - MS SQL Server

- Oracle
- Sybase

Note. For the sake of brevity, this documentation sometimes refers to DB2 UDB for UNIX, Linux, and Windows as DB2 UNIX/NT. In addition, DB2 UDB for z/OS is abbreviated as DB2 z/OS.

There are two possible descriptions you will see for Languages: *All* and specific language names.

- *All* indicates that you will run this step regardless of which language your database uses.
- Specific language name(s) indicates that you will run this step only if your database uses the language(s) specified. You specified which languages are installed on your database when you set up your Change Assistant job configuration.

For more information about properties, refer to the Enterprise PeopleTools PeopleBook documentation.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 2

Prepare Your Database

This chapter discusses:

- Understanding the Database Preparation
- Updating Statistics
- Running Initial Audit Reports
- Reporting Row Count for Tables
- Verifying Upgrade User
- Preparing Your Database

Understanding the Database Preparation

In this chapter, you start preparations for the technical portion of the upgrade. Preparation tasks include updating statistics, cleaning audits, and running and reviewing pre-upgrade reports. These tasks do not use the new installed version of PeopleSoft. Use your current codeline and PeopleTools version to perform these tasks.

Task 2-1: Updating Statistics

Run this task to improve performance of your compare and copy processes. Have your database administrator update statistics on your database before proceeding with your upgrade. Later in the upgrade, you will update your statistics again due to changes in the database structure.

See Appendix: “Performance Tips and Techniques.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-2: Running Initial Audit Reports

This section discusses:

- Understanding Running Initial Audit Reports
- Run the Initial DDDAUDIT Report
- Run the Initial SYSAUDIT Report
- Run the Initial Alter Audit
- Review the Initial Audits

Understanding Running Initial Audit Reports

In this task, you run and review your initial DDDAUDIT, SYSAUDIT, and Alter Audit reports. Running these reports ensures that your database is as clean as possible for the remainder of the upgrade.

Task 2-2-1: Run the Initial DDDAUDIT Report

DDDAUDIT is an SQR script that compares your production SQL data tables with the PeopleTools record definitions to identify inconsistencies.

Using SQR from your current (old) release of PeopleSoft, run the DDDAUDIT against the Target Database to ensure that you are starting with a clean database. You can find this SQR script in the PS_HOME\SQR directory. For instructions on how to run DDDAUDIT, refer to the reference below.

You will review the output from the report in a later step.

See Review the Initial Audits.

See Enterprise PeopleTools PeopleBook: System and Server Administration for your current release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-2-2: Run the Initial SYSAUDIT Report

SYSAUDIT is an SQR script used to identify “orphaned” PeopleSoft objects. For example, SYSAUDIT can identify a module of PeopleCode that exists but does not relate to any other objects in the system. SYSAUDIT also identifies other inconsistencies within your database.

Using SQR from your current (old) release of PeopleSoft, run SYSAUDIT against the Target Database to ensure that you are starting with a clean database. You can find this SQR script in the PS_HOME\SQR directory. For instructions on how to run SYSAUDIT, refer to the reference below.

You will review the output from the report in a later step.

See Review the Initial Audits.

See Enterprise PeopleTools PeopleBook: System and Server Administration for your current release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

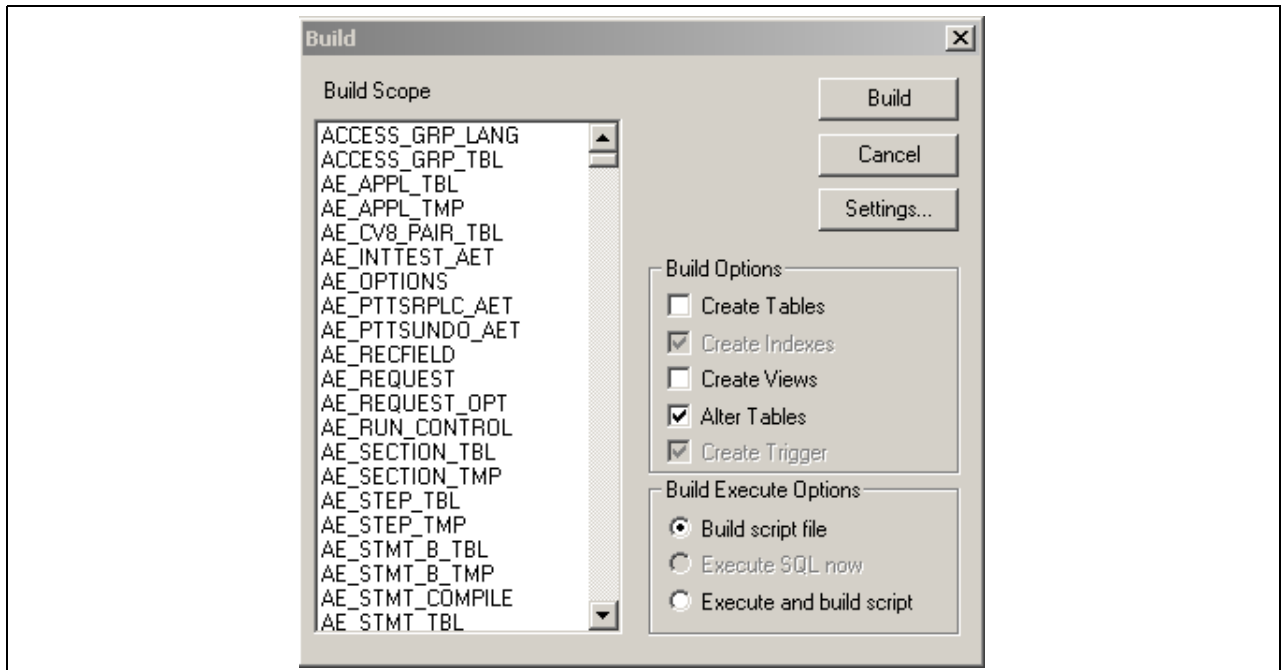
Task 2-2-3: Run the Initial Alter Audit

To verify that the PeopleTools definitions are synchronized with the underlying SQL data tables in your database, run the PeopleTools alter record process on all records in your system. This process, called an Alter Audit, compares the data structures of your database tables with the PeopleTools definitions to identify inconsistencies. Alter Audit then creates SQL scripts with the data definition language (DDL) changes that are required to synchronize your database with the PeopleTools definitions.

To run Alter Audit:

1. Launch PeopleTools and sign on to the Target database.
2. From Application Designer, select File, New...
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project...
5. Select Records from the Definition Type drop-down list box.
6. Select Table from the Type drop-down list box.
7. Click Insert, and then click Select All.
8. Click Insert, and then click Close.
9. Select File, Save All.
10. Enter a project name of your choice.
11. Click OK.
12. Select Build, Project...

The Build dialog box appears:



Build dialog box

13. Under Build Options, select Alter Tables.

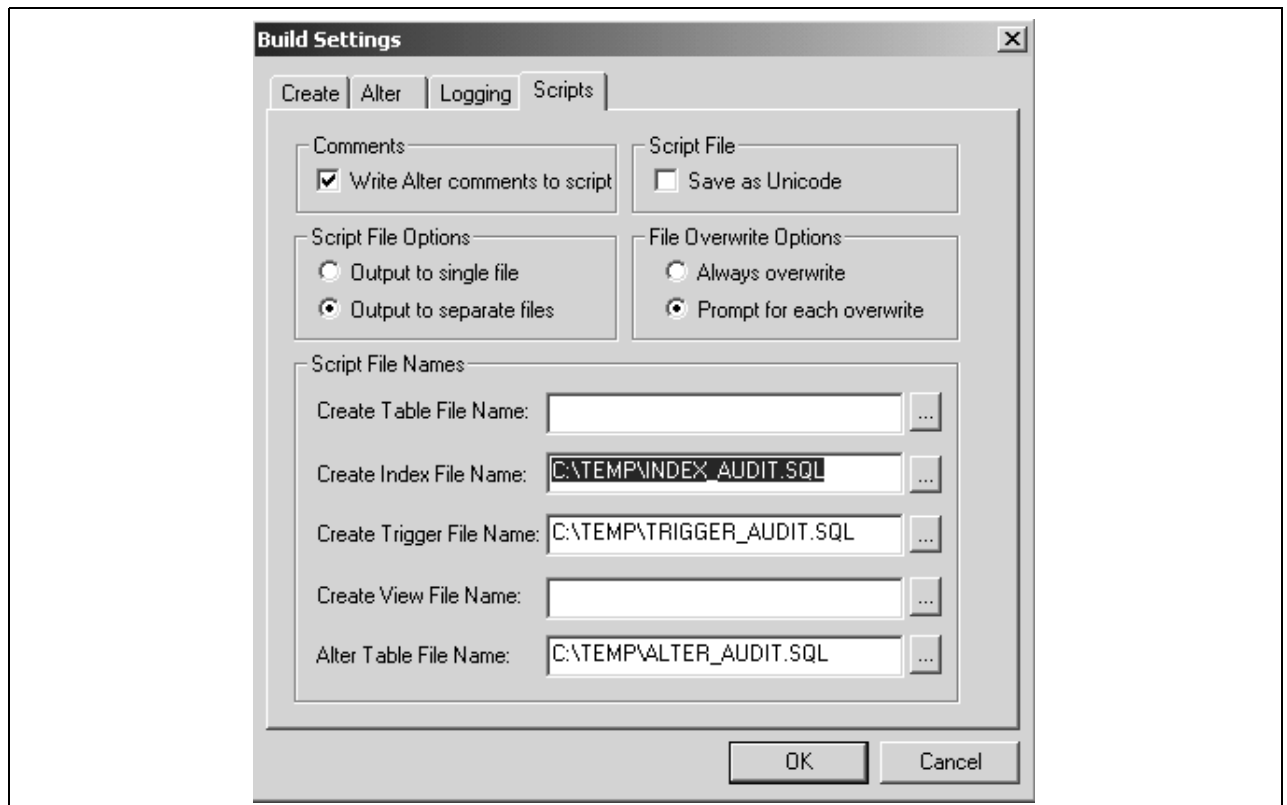
Create Indexes and Create Trigger are automatically selected.

14. Under Build Execute Options, select Build script file.

15. Click Settings...

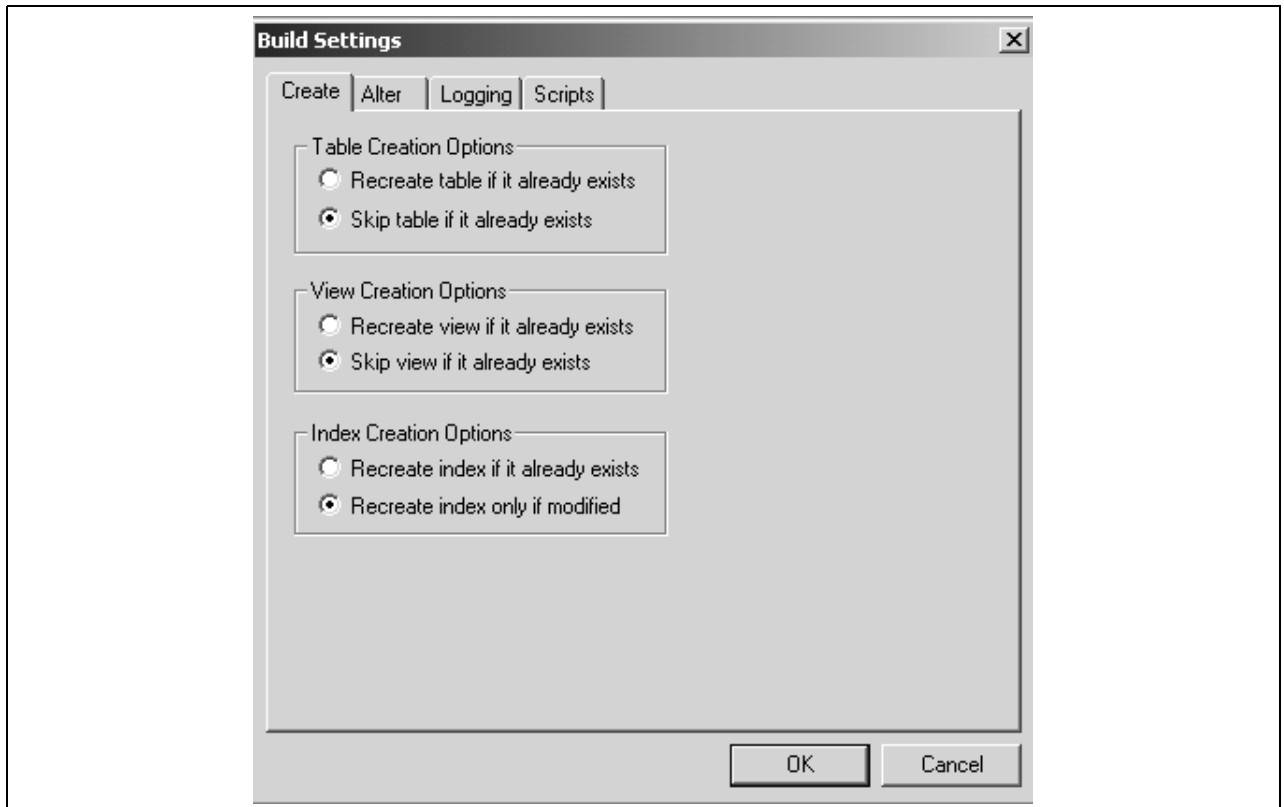
The Build Settings dialog box appears.

16. Select the Scripts tab.



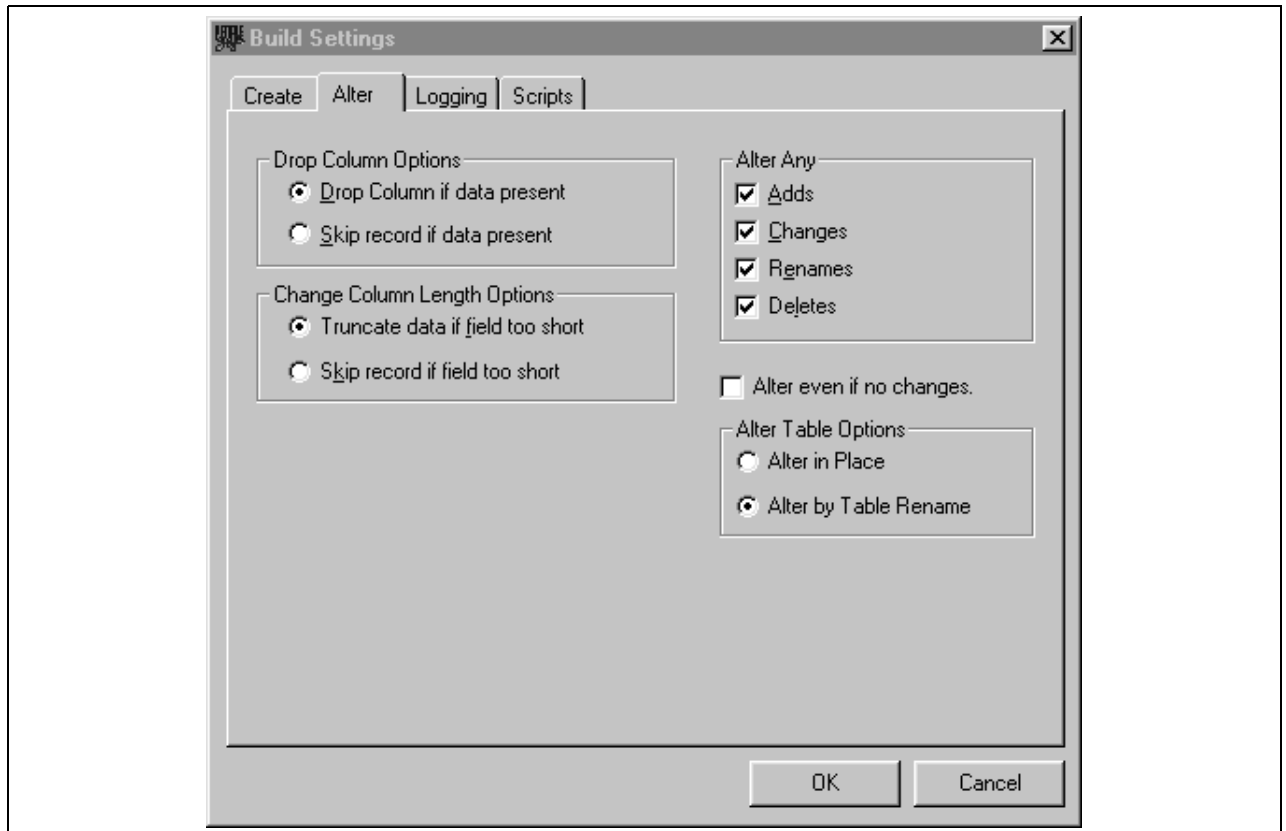
Build Settings dialog box: Scripts tab

17. Under Comments, select Write Alter comments to script.
18. Under Script File Options, select Output to separate files and enter script names.
19. Select the Create tab.



Build Settings dialog box: Create tab

20. Under Index Creation Options, select Recreate index only if modified.
21. Select the Alter tab.



Build Settings dialog box: Alter tab

22. Ensure that the following fields are set correctly:

- Under the Alter Any option section, the Adds, Changes, Renames, and Deletes check boxes should be selected.
- Drop Column Options should be set to Drop Column if data present.
- Change Column Length Options should be set to Truncate data if field too short.

23. Click OK.

The Build dialog box reappears.

24. Click Build on the Build Dialog.

25. Click Close when complete.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-2-4: Review the Initial Audits

In this step, you review the audits you performed earlier in this task. Review the audits before proceeding with the upgrade.

Review the output from the SYSAUDIT and DDDAUDIT reports and correct any discrepancies. When application tables are deleted from the Application Designer, they are not automatically deleted from the system tables. PeopleSoft takes this precaution in case you have customized information that you want to preserve. When you review your DDDAUDIT listing, these tables are listed as a discrepancy between the PeopleSoft application and the database.

Now you must decide whether to drop these tables or retain them. In most cases, you will want to drop the tables, using your SQL tool to drop the tables from the system catalogs. If you have customized information or processes that access these tables, you may want to retain them in the system tables even though they will no longer be accessed or updated by PeopleSoft. Drop any unnecessary deleted tables now so that your future DDDAUDIT reports will be as clean as possible.

The Alter Audit produces your named scripts from the previous step. These scripts contain SQL that corrects any discrepancies between your PeopleTools Record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies.

Note. Triggers are always dropped and re-created during the alter process and will always show up in the generated Alter Audit script. You can ignore the generated script for triggers.

Note. For Microsoft SQL Server and DB2 UNIX/NT platforms, if your database has tables containing the MSSCONCATCOL or DBXCONCATCOL column, you will see SQL alter the tables and re-create their associated indexes, even though the underlying tables and indexes may not have changed.

See Enterprise PeopleTools PeopleBook: System and Server Administration for your current release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-3: Reporting Row Count for Tables

You may find it helpful to run a report that identifies any table without rows, that is, any table not used in your production database. This information can help you determine whether to accept a change from the New Release Demo database. The UPGCOUNT process reports the row counts of all PeopleSoft tables in your database. You can find the resulting report (UPGCOUNT.LIS) in your C:\TEMP directory.

Using your current (old) release of PeopleSoft, run the Application Engine program UPGCOUNT from the command line on your client workstation against the Target database. The command line command is as follows:

```
\PS_HOME\bin\client\winx86\psae -CT dbtype -CS server -CD dbname -CO oprid -CP =>
oprpswd -R UPG -AI UPGCOUNT
```

Note. The -CS option applies to Informix and Sybase installations only.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-4: Verifying Upgrade User

In this task, you verify that the user performing the upgrade steps has proper permissions to complete the upgrade.

Ensure that your upgrade user has PeopleSoft administrator privileges. This allows access to the PeopleSoft portal to make necessary security changes for the upgrade and to run the Portal Application Engine upgrade program. You use this ID to update the security setting for your other users so they can sign on after the upgrade.

Warning! You must perform this step now using your old version of PeopleTools. If you skip this step, or if your user has insufficient PeopleSoft administrator privileges, you will not be able to complete your upgrade. You cannot complete this step later in the upgrade process. Perform the following steps to grant administrator privileges now.

To grant your upgrade user PeopleSoft administrator privileges:

1. From the browser, select PeopleTools, Security, User Profiles, User Profiles.
2. Select the user ID for your upgrade user.
3. Select the Roles tab.
4. Add the role *PeopleSoft Administrator* if it is not already granted to your upgrade user.
5. Save the User Profile.

See Enterprise PeopleTools PeopleBook: Security Administration for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-5: Preparing Your Database

This section discusses:

- Understanding Database Preparation
- Verify Database Integrity
- Drop PeopleTools Tables

- Shrink Images
- Purge Message Queues
- Delete Pagelet Wizard Data

Understanding Database Preparation

In this task, you perform a variety of steps in preparation for the PeopleTools upgrade. These steps prevent errors in tasks later in the upgrade.

Task 2-5-1: Verify Database Integrity

Use the command specific to your database platform environment to perform a database consistency check on your Target database to ensure that it is clean and to minimize any potential upgrade errors due to possible database corruption.

Platform	Command
Microsoft SQL Server	DBCC CHECKDB
Sybase	DBCC CHECKDB

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server Sybase	All

Task 2-5-2: Drop PeopleTools Tables

In this step, you drop PeopleTools tables to ensure the successful completion of your upgrade. You will drop the following tables, if they exist in your database, using the SQL tool of your choice.

Drop the following tables:

- PS_PSMCFQUEUESLANG

Note. The table, PS_PSMCFQUEUESLANG, contains no data and can be safely dropped. Do *not* drop the table PSMCFQUEUESLANG.

- PSOPTSTATUS

The table, PSOPTSTATUS, will be converted into a view and can be safely dropped. Do not drop the view PSOPTSTATUS.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-5-3: Shrink Images

If you have customized images stored in your database, you may need to shrink these images before updating PeopleTools system tables later in the upgrade. Large image fields could cause that step to fail because it is not possible to bind long raw data that is longer than 32 KB.

To shrink images using a PeopleTools release later than 8.44.14:

1. Launch Configuration Manager and select the Profile tab.
2. Select the profile for the upgrade database and click Edit.
3. Select the Common tab.
4. Select the radio button Convert DIB and BMP images to JPG.
5. Click OK.

Note. If you re-shrink images, select Don't Convert, but Shrink Images to Image Size Limit. Specify the number of bytes for the image size limit.

6. Launch Application Designer.
7. Select Tools, Upgrade, Convert Images...
8. Select Convert Static Images in Image Catalog.
9. Click Start to convert or shrink images.
10. Select Tools, Upgrade, Convert Images...
11. Select Convert Dynamic Images for fields. Select the box for all of the fields listed.
12. Click Start to convert or shrink images.

If you are using a PeopleTools release earlier than 8.44.15, you will need to manually save and temporarily remove any custom images greater than 32 KB. Using your SQL query tool, run the following SQL to identify images greater than 32 KB:

```
-- CREATE A TABLE TO HOLD THE CONVERTED IMAGE
CREATE TABLE PS_CONVIMG (CONTNAME VARCHAR2(30), IMAGE_SIZE BLOB);
-- LOAD CONVERTED DATA INTO THE TABLE
INSERT INTO PS_CONVIMG SELECT CONTNAME, TO_LOB(ContData) FROM PSContDefn;
-- RETRIEVE IMAGES OVER 32K
SELECT CONTNAME, DBMS_LOB.GETLENGTH(IMAGE_SIZE) IMAGE_SIZE FROM PS_CONVIMG WHERE⇒
  DBMS_LOB.GETLENGTH(IMAGE_SIZE) > 32768;
```

To manually save images greater than 32 KB:

1. In Application Designer, insert your images into a project. Select Insert, Definitions into Project.
2. Save the project.

3. Copy the images to file. Select Tools, Upgrade, Copy Project to File.
4. Delete the rows for the images in your project from the PSCONTDEFN table.
5. When you are finished with the upgrade, copy the project from file to restore your custom images. Select Tools, Upgrade, Copy Project from File.

See “Apply PeopleTools Changes,” Updating PeopleTools System Tables.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 2-5-4: Purge Message Queues

Ensure that all your message transactions are complete before starting the upgrade. Message functionality and structure changed in the new release, which will prevent old messages from processing successfully.

Run the following Data Mover script, found in the %PS_HOME\SCRIPTS directory of your old release codeline, on your Target database to purge your message queues:

```
APPMSGPURGEALL.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 2-5-5: Delete Pagelet Wizard Data

This step is only applicable if you have already upgraded your production application to PeopleTools 8.46 or greater.

In this step, you run a script to delete the common components Pagelet Wizard (PW) data to ensure that when the UPGPT846PP conversion program is run subsequently, the old existing common components Pagelet Wizard data is not re-entered into the PeopleTools Pagelet Wizard tables. If you do not run the script, then items that were removed from the PeopleTools version of Pagelet Wizard, but still exist in the common components version of Pagelet Wizard, will be copied back into the PeopleTools version when the UPGPT846PP conversion program is run.

The script also updates the common component portal option tables with the existing values in the PeopleTools portal options tables. If you do not run the script, then changes made to the current PeopleTools options tables may be overwritten with values from the common components portal options when the UPGPT846PP conversion program is run. The affected values include the default registry prefix, default owner ID, and the default style sheet.

Run the script *only* if both of the following conditions are met:

- Your current production application release database is *already* on PeopleTools 8.46 or greater.
- The PS_EOPPB_LINKPATHS table exists on the target database.

If *both* of the above conditions are met, then run the following script:

```
PTPPB_EOPPB.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 3

Install the Software

This chapter discusses:

- Understanding the Installation Files
- Installing the New Release
- Installing the Change Assistant
- Creating a Change Assistant Job

Understanding the Installation Files

In this task, you will install the software required for this upgrade. You will download the *PeopleTools 8.4x Installation Guide* for your database platform from PeopleSoft Customer Connection. At this time, we recommend you download and apply all files and objects from the Upgrade page on PeopleSoft Customer Connection. These fixes will bring you up-to-date with any changes made to the upgrade process.

You will also install the PeopleSoft Change Assistant on any workstation you plan to use during the remainder of the upgrade. You must install the PeopleSoft Change Assistant at this time. The written documentation will not make sense from this point forward without the use of the PeopleSoft Change Assistant. In order to properly use the PeopleSoft Change Assistant, you also need to download the appropriate template for your upgrade from PeopleSoft Customer Connection.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release.

Task 3-1: Installing the New Release

This section discusses:

- Understanding the New Release
- Shut Down Servers
- Save Customized Configuration Files
- Backup PeopleTools Directories
- Install Software from CD
- Apply PeopleTools Patch
- Set Up Application and Batch Servers

- Set Up the Web Server
- Set Up Pure Internet Architecture

Understanding the New Release

Download the Enterprise PeopleTools Installation Guide, for your platform on your new release.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes).

Using PeopleSoft Customer Connection is an essential part of a successful PeopleSoft application installation. The updates and fixes database (Patch Fix Search page) on PeopleSoft Customer Connection contains an up-to-date record of any modifications and fixes you will need to be aware of for the upgrade. If you find any items categorized as required at upgrade or installation, you should detach any associated files and be ready to implement them at the appropriate time.

See PeopleSoft Customer Connection (Update + Fixes, Required at Install or Upgrade).

Task 3-1-1: Shut Down Servers

Shut down any application servers, web servers, and process scheduler servers. Make sure there are no lingering threads from any application server domains. Such threads can interfere with successfully installing new application server files. If there are any threads remaining after you shutdown the domains, you need to manually remove them.

Note. AIX: Run the slibclean utility as the root user to remove unused shared libraries from memory.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-2: Save Customized Configuration Files

If you have any customized configuration files (such as psappsrv.cfg, psconfig.sh, pspt, pscbl.mak, psrun.mak, \$ORACLE_HOME/opmn/conf/opmn.xml, and so on), copy them to another directory so that they are not overwritten during the upgrade process. This enables you to preserve any tuned variables.

Configuration files are typically overwritten when you install the new release using the PeopleSoft Installer.

Note. You may want to print the old configuration files, so that you can easily refer to them in subsequent steps.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-3: Backup PeopleTools Directories

Backup your existing PeopleTools directories. Clone your existing directories and place them in a separate area on your application server, web server, batch server, and file server.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-4: Install Software from CD

This step must be performed for all your PeopleSoft servers, which include the application server, batch server, web server, and file server. Install the PeopleTools software to all your PeopleSoft servers from the PeopleTools CD-ROM. Run the PeopleSoft Installer and install the software to the same PS_HOME directory where you installed the previous PeopleTools 8.4x software, where x represents the PeopleTools release level from which you are upgrading.

Note. If you customized your existing PeopleTools files, the customizations are overwritten with the new PeopleTools files when you install the software.

Windows based Servers only: If you are installing PeopleTools in languages other than English, select *PeopleTools Language Pack* and/or *PeopleTools Language Pack Development Kit* from the CD-ROM Installation.

Note. DB2 z/OS: In order to transfer files to the Batch Server, run Server Transfer (PSTRANS.EXE). This will transfer the files from the file server to the batch server then recompile and relink COBOL.

See the Enterprise PeopleTools installation guide, “Using the PeopleSoft Installer,” for your database platform on your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-5: Apply PeopleTools Patch

As part of the PeopleTools upgrade, you may incorporate the application of a PeopleTools patch into the upgrade process. Apply the PeopleTools patch for the new PeopleTools release you are installing; do not apply a PeopleTools patch for a different PeopleTools release. If you are applying a PeopleTools patch, you need to apply the changes to all your servers at this time.

The patches are located on PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Patches and Fixes). Review the documentation delivered with the patch to fully understand the fixes.

Run \PA84XXX\setup.XXX, provide the same license code that was used to install the PeopleTools 8.4X CD, and install the patched components to all of the appropriate PeopleSoft servers (application server, batch server, database server, file server, web server) on top of your existing high level PeopleSoft directory.

Note. If the patch includes database changes, you will apply the database changes later during this upgrade.

Note. DB2 z/OS: To transfer files to the batch server, run Server Transfer (PSTRANS.EXE). This will transfer the files from the file server to the batch server then recompile and relink COBOL.

See the Enterprise PeopleTools installation guide, “Using the PeopleSoft Installer,” for your database platform on your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-6: Set Up Application and Batch Servers

Re-create your application server and batch server domains. A PeopleTools-only upgrade may contain revised application server and batch server templates with new parameters. You will not be able to benefit from the new parameters if you do not recreate the domain(s). Use the appropriate PSADMIN template (small, medium, or large), and specify the values contained in your previous configuration files so that you can retain your tuned variables. If you have not tuned the domain, keep the defaults. Do not boot your application and batch servers at this time.

Note. Oracle platforms do not need to regenerate the shared libraries with PeopleTools-only upgrades.

Note. If you are upgrading PeopleTools and you have PeopleSoft application COBOL modules, you must recompile all COBOL. Ensure that the following COBOL runtime files in your client and server bin directories match those of your NetExpress installation: cblints.dll, cblrtss.dll, cblvios.dll, and COB32API.DLL.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-7: Set Up the Web Server

Be sure to uninstall any previous Oracle’s PeopleSoft Pure Internet Architecture installations on the web server. After you uninstall any previous PeopleSoft Pure Internet Architecture installations (and *before* you reinstall), reboot the server. This will ensure that any previous files are removed from the system.

Depending on your web server platform, complete the following steps to uninstall previous PeopleSoft Pure Internet Architecture sites for either UNIX or Windows:

- Shut down WebLogic and delete the contents of one of the following directories:
 - For PeopleTools 8.43.x or earlier: *weblogic_home\peoplesoft_domain**
 - PeopleTools 8.44.x or later: *PS_HOME\webserv\peoplesoft_domain**
- Shut down WebSphere and delete the contents of *websphere_home\AppServer\installedApps\peoplesoft_app**.
- For Oracle Application Server (OAS), perform the following steps:
 - Remove the OC4J component. In case of single component deployment, the OC4J component that has the application name needs to be removed. In case of multi-component deployment, 3 OC4J components – PIA_<app-name>, PSOL_<app-name>, PSEMHUB_<app-name> – need to be removed. The OC4J component can be removed from the Application Server Control by selecting the OC4J component and clicking "Delete OC4J Instance." Or, remove the OC4J component by using the command line `$ORACLE_HOME/dcm/bin/dcmctl removecomponent -co <component-name>`.
 - If you are upgrading from an older OAS version to a newer OAS version, shut down OAS and follow the uninstall instructions in the Enterprise PeopleTools installation guide for your database platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-1-8: Set Up Pure Internet Architecture

In this task you set up Oracle's PeopleSoft Pure Internet Architecture.

See the Enterprise PeopleTools installation guide for your database platform on your new release.

Note. Make sure you stop the server before performing the PeopleSoft Pure Internet Architecture install or uninstall and, to be safe, reboot the machine between the uninstall and the reinstall.

If you are using Oracle Application Server (OAS) and have customized your OAS installation, run the following commands after setting up Oracle's PeopleSoft Pure Internet Architecture:

```
$ORACLE_HOME/opmn/bin/opmnctl reload
$ORACLE_HOME/dcm/bin/dcmctl updateconfig
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-2: Installing the Change Assistant

Now that PeopleTools is installed, you need to install the PeopleSoft Change Assistant for your new release on any workstation that you will use to perform portions of the upgrade.

Follow the instructions in the *Enterprise PeopleTools 848 Installation Guide for your database platform: Installing PeopleSoft Change Assistant* to install PeopleSoft Change Assistant. Review the *Enterprise PeopleTools PeopleBook for your release: Software Updates* for information on how to navigate through the Change Assistant, how to set up your upgrade templates, and how to run your upgrade process.

Once Change Assistant has been installed, open it by selecting Start, Programs, PeopleSoft 8.4, Change Assistant.

Note. If an older version of Change Assistant is already installed on the workstation, remove the older version. Then install the new Change Assistant.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-3: Creating a Change Assistant Job

This section discusses:

- Set Up Change Assistant
- Set Configuration Manager Profile
- Finalize Documentation

On the PeopleSoft Customer Connection upgrade documentation page for the new release, you will find the PeopleSoft upgrade templates. Using PeopleSoft Change Assistant, you can open the appropriate template and create a job for your initial upgrade pass.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release.

Task 3-3-1: Set Up Change Assistant

In order to run an upgrade using Change Assistant, you need to configure Change Assistant and create an upgrade job.

To set up Change Assistant:

1. Launch Change Assistant.
2. Configure the Change Assistant options:
 - a. Select Tools, Options.
 - b. On the Change Assistant tab, select the Perform PeopleTools Only Upgrade mode.

- c. Fill in the rest of the information on this tab and the other active tabs.
- d. Click OK.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates, “Installing and Configuring Change Assistant,” for your new release.

3. Import the upgrade template into Change Assistant:
 - a. Select File, Import Template.
 - b. Enter or browse to the directory containing the upgrade template and select PeopleTools_Only_Upgrade.xml.
 - c. Click Import.
4. Define the upgrade environment information for the upgrade:
 - a. Select File, New Environment.
 - b. Name the environment for this upgrade pass.
 - c. Click OK.
 - d. Then, fill in all the required information on each screen.

See PeopleSoft Customer Connection, (Updates + Fixes, Documentation Updates, Enterprise, PeopleTools, Change Assistant, Using Change Assistant for Application Upgrades).

5. Create the upgrade job for the initial upgrade pass.

The upgrade job contains all steps specific to your upgrade environment.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates, “Configuring Change Assistant for Upgrades,” for your new release.

6. Set the documentation directory in Change Assistant:
 - a. Left click on the upgrade job title and select Set Documentation Directory.
 - b. Enter or browse to the directory containing the HTML documentation for this upgrade and click OK.

Change Assistant displays the HTML upgrade documentation in the documentation pane.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates, “Configuring Change Assistant for Upgrades,” for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

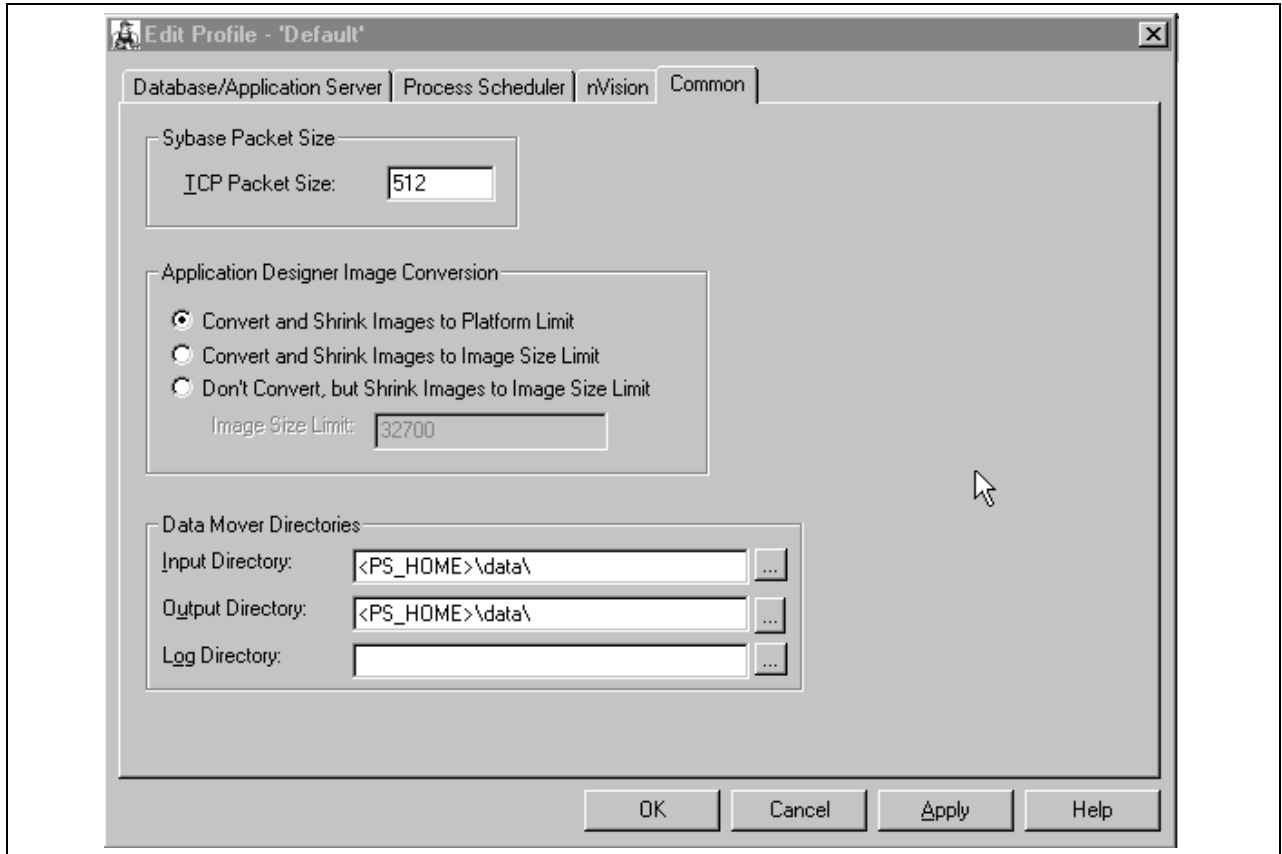
Task 3-3-2: Set Configuration Manager Profile

When you created your Change Assistant job, some of the workstation Configuration Manager profiles were edited by Change Assistant. Now you need to verify the other settings that are used during the upgrade. These are settings on the workstation and you will need to do this for each workstation you may use during the upgrade.

To set the profile:

1. Open Configuration Manager.
2. On the Profile tab, select the Default Profile, and click on Edit.
3. In the Edit Profile - 'Default' dialog box, select the Common tab.

On the Profile tab, select the Default profile, click on Edit and go to the Common tab.



Edit Profile - Default: Common tab

4. Verify that the Input Directory is *PS_HOME\data*, substituting *PS_HOME* with your directory. The Output Directory must be the same.
5. The Log Directory is set by Change Assistant and should be left as is.
6. Select the Process Scheduler tab and verify your SQR settings. Change Assistant will use these settings to launch SQR.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 3-3-3: Finalize Documentation

Since Change Assistant filters the steps of the upgrade to be specific to your environment, you will want to finalize the filtered documentation via Change Assistant. If you try to follow the delivered nonfiltered version of the upgrade documentation, you will see steps interspersed that do not pertain to your specific upgrade environment.

To save filtered documentation:

1. Select Edit, Finalize Documentation.
2. Click OK.

A dialog box appears stating that finalizing was completed and displaying the final document name.

3. PeopleSoft Change Assistant loads the documentation into the HTML browser that you previously specified in the Change Assistant Options Dialog box. It saves the documentation file to the same folder that was set as your documentation directory.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 4

Apply PeopleTools Changes

This chapter discusses:

- Understanding PeopleTools Changes
- Performing Script Modifications
- Updating PeopleTools System Tables
- Turning Off Change Control
- Loading Model Definition Data
- Loading Message Data
- Reviewing PeopleTools Objects
- Exporting and Copying Projects
- Populating Tablespace Data
- Building Updated PeopleTools Project
- Migrating Records to New Tablespaces
- Loading Base Data
- Loading Language Data
- Loading PeopleTools Data
- Loading PeopleTools Definition Group
- Converting PeopleTools Objects
- Creating All Views
- Converting Integration Broker
- Creating All Triggers
- Regenerating Sync IDs
- Updating Object Version Numbers
- Backing Up After PeopleTools Upgrade

Understanding PeopleTools Changes

In order to implement a successful upgrade, you must apply the necessary PeopleTools changes. This involves updating PeopleTools system tables, copying and building PeopleTools projects, loading PeopleTools seed data, and converting PeopleTools objects. From this point forward, you run all steps using your newly installed version of PeopleTools.

Note. Unless otherwise indicated, all scripts can be found in your new release PeopleSoft codeline PS_HOME\SCRIPTS directory. The actual script name is indicated in the description of each step in uppercase letters.

Task 4-1: Performing Script Modifications

This section discusses:

- Understanding Script Modifications
- Run a DBTSFIX Report
- Edit the DBTSFIX Output Scripts
- Edit the GRANT Script
- Edit the PSLANGUAGES Script
- Edit the TLSUPGNONCOMP Script
- Edit the PTxxxTLS Scripts
- Edit the DDLDB2 Script
- Edit the DDLDBX Script
- Edit the DDLORA Script
- Edit the DDLIFX Script
- Edit the MSGTLSUPG Script
- Edit the Integration Broker Script
- Edit Multilingual Step Properties

Understanding Script Modifications

In this task, you perform preparation steps and make manual modifications to scripts delivered with your new PeopleSoft release. You must make the following modifications before proceeding with the remainder of your upgrade.

Task 4-1-1: Run a DBTSFIX Report

The DBTSFIX.SQR script aligns the tablespaces in the delivered release scripts with the Target database used during the upgrade. This process generates new release scripts, conforming to the RELxxxDBTSFIX.SQL naming convention that you run in a later task. Run this script to preserve your existing table-to-tablespace mapping in the Target database. The result of this task will be a RELxxxDBTSFIX.SQL script in which xxx represents a release number (for example, 800, 810, 811, 812, and so on) associated with your particular path.

Note. Before running this step, verify that the PS_HOME values are set correctly in the Change Assistant environment for your upgrade job. Change Assistant uses the PS_HOME information to determine which scripts need to be generated.

Important! Do not run the new release script at this point. You will be instructed to run this script later in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 4-1-2: Edit the DBTSFIX Output Scripts

Edit the generated RELxxxDBTSFIX scripts according to the comments within each script. Verify that the data definition language (DDL) is accurate for your environment for tablespaces, database names, owner IDs, and so forth. The scripts can be found in your Change Assistant output directory for this upgrade path.

Warning! Do not run output scripts at this time. At this point in the upgrade process, you must only review the DBTSFIX output scripts.

Note. For DB2 z/OS customers only: When upgrading from one PeopleSoft release to the next, it is possible to move tables from a tablespace using a 4-KB buffer pool to one using a 32-KB buffer pool. The tablespaces PSIMAGE and PSIMGR use 32-KB buffer pools in PeopleSoft-delivered applications. To maintain the tablespace schema used at your site, the DBTSFIX.SQR script will revise the upgrade scripts with the database and tablespace information from your database (the Target database). Tables assigned to tablespaces PSIMAGE or PSIMGR in the upgrade scripts are the exception to this approach. Note that PeopleSoft has reassigned some tables to PSIMAGE or PSIMGR because they now require a 32-KB buffer pool. You must manually edit the “Create Table” statements in the upgrade scripts to replace the tablespace name PSIMAGE or PSIMGR with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool. The database name must also be replaced with the value corresponding to the tablespace you are using.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 4-1-3: Edit the GRANT Script

Edit PS_HOME\SCRIPTS\GRANT.SQL and make the necessary modifications as documented in the script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-1-4: Edit the PSLANGUAGES Script

Edit PS_HOME\SCRIPTS\PSLANGUAGES.DMS and make the necessary modifications as documented in the script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-1-5: Edit the TLSUPGNONCOMP Script

Edit PS_HOME\SCRIPTS\TLSUPGNONCOMP.DMS and make the necessary modifications as documented in the script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-1-6: Edit the PTxxxTLS Scripts

This step applies only if you are running on a DB2 z/OS platform.

To edit the PTxxxTLS scripts:

1. Edit all the scripts in the PS_HOME\SCRIPTS directory on the file server that conform to this file naming convention:

```
PTxxxTLS.DMS
PTxxxTLSyyy.DMS
```

The xxx represents a PeopleTools release greater than your current PeopleTools release and yyy represents the three-letter language code.

2. Uncomment and modify the set owner ID command within each script, as in the following example:

```
set execute_sql set current sqlid = 'OwnerId In Upper Case';
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-1-7: Edit the DDLDB2 Script

Edit PS_HOME\SCRIPTS\DDLDB2.DMS. At the bottom of this script, you will see an insert into PSDDLDEFPARMS. This insert contains default information used when creating a table, an index, a unique index, or a tablespace. Verify with your database administrator that the last value for each row is appropriate for your environment by checking the values currently stored in your PSDDLDEFPARMS table. Otherwise, the values will be reset to the default values delivered by PeopleSoft in this script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-1-8: Edit the DDLDBX Script

Edit PS_HOME\SCRIPTS\DDLDBX.DMS. At the bottom of this script, you will see an insert into PSDDLDEFPARMS. This insert contains default information used when creating a table, an index, a unique index, or a tablespace. Verify with your database administrator that the last value for each row is appropriate for your environment by checking the values currently stored in your PSDDLDEFPARMS table. Otherwise, the values will be reset to the default values delivered by PeopleSoft in this script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-1-9: Edit the DDLORA Script

Edit `PS_HOME\SCRIPTS\DDLORA.DMS`. At the bottom of this script, you will see an insert into `PSDDLDEFPARMS`. This insert contains default information used when creating a table, an index, a unique index, or a tablespace. Verify with your database administrator that the last value for each row is appropriate for your environment by checking the values currently stored in your `PSDDLDEFPARMS` table. Otherwise, the values will be reset to the default values delivered by PeopleSoft in this script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-1-10: Edit the DDLIFX Script

Edit `PS_HOME\SCRIPTS\DDLIFX.DMS`. At the bottom of this script, you will see an insert into `PSDDLDEFPARMS`. This insert contains default information used when creating a table, an index, a unique index, or a tablespace. Verify with your database administrator that the last value for each row is appropriate for your environment by checking the values currently stored in your `PSDDLDEFPARMS` table. Otherwise, the values will be reset to the default values delivered by PeopleSoft in this script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 4-1-11: Edit the MSGTLSUPG Script

Edit `PS_HOME\SCRIPTS\MSGTLSUPG.DMS` and make the necessary modifications as documented in the script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-1-12: Edit the Integration Broker Script

Edit `PS_HOME\SCRIPTS\PTIBUPGRADE.DMS` and make the necessary modifications as documented in the script. User level node security and transactional security have been added as of PeopleTools 8.48. Service namespace information, a low-level user on the node, and a low-level permission list for service operations, need to be specified. Consult with your Integration Broker specialist for assistance.

Note. If you are upgrading from PeopleTools 8.48 or later, this step and all of the steps in the task “Converting Integration Broker” do not need to be run since the Integration Broker conversion has already been performed. You may mark all of these steps as “Complete” in your upgrade job. If you don’t mark these steps as complete, the upgrade will try to unnecessarily reconvert your objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-1-13: Edit Multilingual Step Properties

In this step, you will edit the Change Assistant step properties for the multilingual PeopleTools project copy step (or steps). Copy only the translated objects for the languages you license. This prevents the translated objects for unlicensed languages from copying over. You will copy any multilingual projects later in the upgrade process.

Depending on which languages you license, you will need to complete the following instructions once or twice. If you license any of these languages, Arabic, Czech, Danish, Finnish, French, Hebrew, Hungarian, Norwegian, Polish, Russian, or Turkish, perform the following instructions for the step “Export and Copy PPLTLSML Project.” If you license any of these languages, Canadian French, Dutch, German, Greek, Italian, Japanese, Korean, Malay, Portuguese, Simplified Chinese, Spanish, Swedish, Traditional Chinese, or Thai, perform the following instructions for the step “Export and Copy PPLTLS84CURML Project.”

To edit multilingual step properties:

1. In Change Assistant, select the step.
2. Open the Step Properties dialog box.
3. Click the Upgrade button, and then click the Options button.
4. On the Copy Options tab, deselect any languages that you do not license.
Common and English should remain deselected.
5. Click OK three times.
6. Save the template in Change Assistant.

See Export and Copy PPLTLS84CURML Project.

See Export and Copy PPLTLSML Project.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All Non-English

Task 4-2: Updating PeopleTools System Tables

This section discusses:

- Understanding Updating PeopleTools System Tables
- Clean Up Message Data
- Update System Catalog Views
- Update PeopleTools System Tables
- Grant Privileges to the CONNECT ID
- Update PeopleTools Patch Information
- Rerun Update Statistics for DB2 zOS
- Rerun RUNSTATS Report for DB2 UNIX NT
- Rerun Update Statistics for DB2 UNIX NT
- Rerun Update Statistics for Informix
- Rerun Update Statistics for Oracle

Understanding Updating PeopleTools System Tables

In this task, you update your PeopleTools system tables by running various scripts.

Important! From this point forward, run all steps using the new release of PeopleTools unless otherwise indicated.

Task 4-2-1: Clean Up Message Data

If you are upgrading from PeopleTools 8.48 or later, mark this step as “Complete” in your upgrade job and continue with the rest of the upgrade. Do NOT perform any deletes in this step as you will wipe out current valid data that is needed for your system to function properly.

If you are upgrading from PeopleTools 8.47 or earlier, perform this step to clean out obsolete message data. Message functionality and structure changed as of PeopleTools 8.48 and the old data is obsolete. Edit PS_HOME\SCRIPTS\PTUPGIBDEL.SQL to delete data from the tables that only exist in the old PeopleTools release. Open the script and make the following modifications:

1. Search for the string “--- End of PT8.xx ---” in which xx represents the last two digits of the PeopleTools release you are upgrading from.
2. Delete the entire portion of the script below this string.
3. Save the script as PS_HOME\SCRIPTS\PTUPGIBDEL8xx.SQL in which xx represents the last two digits of the PeopleTools release you are upgrading from, as determined in Step 1.

Important! Save the script using the naming convention shown above. This will preserve the original script for use in updating other databases at different PeopleTools releases, and assist in running the script automatically.

Follow this procedure to edit your template so the script can run automatically:

1. Select this step and open the Step Properties dialog box.
2. Change the Script/Procedure value from PTUPGIBDEL8xx to the specific name you used in Step 3 without the .SQL extension.
3. Change the Type from ManualStop to SQLScript, and click OK.
4. In your upgrade job, mark the step as Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-2-2: Update System Catalog Views

This step runs the UPDOBJ.SQL script, which re-creates system catalog views that both DataMover and PeopleTools use.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Microsoft	All

Task 4-2-3: Update PeopleTools System Tables

Release scripts are SQL scripts that modify the underlying table structure of a database so that it is compatible with a more recent PeopleTools release. They are located in the PS_HOME\SCRIPTS directory. Release scripts can be identified by their common naming standard, RELxxx.SQL, in which xxx designates a PeopleTools release number.

These release (REL) scripts alter and update your PeopleTools tables to the current release. Change Assistant determines which RELxxx scripts to run based on the PeopleTools release of your upgrade database.

If you created RELxxxDBTSFIX (in which xxx is a PeopleTools release) earlier in your upgrade, the procedure will look at your Output folder and will know to run RELxxxDBTSFIX. If you did not run DBTSFIX, Change Assistant will run RELxxx.

Note. Before running this step, verify that the PS_HOME values are set correctly in the Change Assistant environment for your upgrade job. Your new release PS_HOME/SCRIPTS directory should contain all scripts that will be run during this step. This step runs at least one script. Do not proceed to the next step until these scripts run successfully.

See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-2-4: Grant Privileges to the CONNECT ID

This step runs the GRANT.SQL script. This script grants select access to the connect ID for tables necessary for sign on.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-2-5: Update PeopleTools Patch Information

In this step, you update your database with the version of the PeopleTools patch being applied.

Note. You only need to run this step if you are applying a PeopleTools patch as part of the upgrade process.

Log on to Data Mover in user mode and run the %PS_HOME\SCRIPTS\PTPATCH.DMS script.

Review the PeopleTools patch instructions and perform any additional database upgrade instructions that may be listed prior to the copy of the patch project. The patch project will be copied later during the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-2-6: Rerun Update Statistics for DB2 z/OS

Earlier in the upgrade process, you updated your statistics for DB2 z/OS. Due to changes in the database structure, you must update statistics again to improve the performance of your compare and copy. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-2-7: Rerun RUNSTATS Report for DB2 UNIX NT

This script creates the RUNSTATS.DAT file for the script to update the statistics for DB2 UDB on UNIX, Linux, or Windows.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-2-8: Rerun Update Statistics for DB2 UNIX NT

Earlier in the upgrade process, you updated your statistics for DB2 UDB on UNIX, Linux, or Windows. Due to changes in the database structure, you must update statistics again to improve the performance of your compare and copy. This step runs RUNSTATS .SQL to update statistics on your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-2-9: Rerun Update Statistics for Informix

Earlier in the upgrade process, you updated your statistics for Informix. Due to changes in the database structure, you must update statistics again to improve the performance of your compare and copy. This step runs UPDATESTATS to update statistics on your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 4-2-10: Rerun Update Statistics for Oracle

Earlier in the upgrade process, you updated your statistics for Oracle. Due to changes in the database structure, you must update statistics again to improve the performance of your compare and copy. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-3: Turning Off Change Control

This task executes a SQL statement that turns off the Change Control feature to improve performance for the upgrade copy. One of the tasks for completing database changes will remind you to turn this feature on again, if you want to use it.

See “Complete Database Changes,” Reviewing Change Control.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-4: Loading Model Definition Data

This section discusses:

- Understanding Model Definition Data Load Process
- Load Model Definitions for DB2 zOS
- Load Model Definitions for DB2 UNIX NT
- Load Model Definitions for Oracle
- Load Model Definitions for Informix
- Load Model Definitions for Microsoft
- Load Model Definitions for Sybase

Understanding Model Definition Data Load Process

In this task, you load model definition scripts for your database platform and populate DDL model definitions. This step runs the DDL model definition script applicable to your database platform. If required by your database platform, you modified this script in the task “Performing Script Modifications,” to use your site-specific information.

See Performing Script Modifications.

Task 4-4-1: Load Model Definitions for DB2 zOS

This step runs the DDLDB2.DMS script to populate DDL model definitions for the DB2 z/OS platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-4-2: Load Model Definitions for DB2 UNIX NT

This step runs the DDLDBX.DMS script to populate DDL model definitions for DB2 UDB on UNIX, Linux, or Windows.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT	All

Task 4-4-3: Load Model Definitions for Oracle

This step runs the DDLORA.DMS script to populate DDL model definitions for the Oracle platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle	All

Task 4-4-4: Load Model Definitions for Informix

This step runs the DDLIFX.DMS script to populate DDL model definitions for the Informix platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Informix	All

Task 4-4-5: Load Model Definitions for Microsoft

This step runs the DDLMSS.DMS script to populate DDL model definitions for the Microsoft SQL Server.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	MS SQL Server	All

Task 4-4-6: Load Model Definitions for Sybase

This step runs the DDLSYB.DMS script to populate DDL model definitions for the Sybase platform.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Sybase	All

Task 4-5: Loading Message Data

This step loads system messages in the message catalog.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-6: Reviewing PeopleTools Objects

Run this step to identify any PeopleTools objects that you have customized. This step only identifies the customized PeopleTools objects. You still must overwrite the customized objects with the new PeopleTools definitions when you copy the project.

During the upgrade process, you copy PeopleTools objects into your database. PeopleTools functionality, such as Security, is built using PeopleTools objects and it is possible that you could have modified the PeopleTools objects that make up a product like Security.

Warning! Do not change the delivered PeopleTools objects. The delivered objects are integral to the smooth operation of your system, and the modification of these objects could cause system instability.

When you perform the copy of the PeopleTools projects during the upgrade, you may overwrite modifications you have made. Excluding any PeopleTools-delivered objects from the upgrade may result in instability due to dependencies on specific objects.

Note. If you are applying this PeopleTools-only upgrade to your Demo database, you do not need to run this task. You will need to run this task when you are applying this upgrade to other environments.

To review PeopleTools objects:

1. Apply the PeopleTools-only upgrade to your Demo database before applying it to other environments.
You will use this Demo database as the source database in the compare process.
2. Open the PPLTLS84CUR project on your Source database.
 - a. Launch Application Designer and sign on to the Demo (Source) database.
 - b. Select File, Open...
 - c. In the Definition field, select Project and click Open to display a list of projects.
 - d. Select the PPLTLS84CUR project and click Open.
3. On your Source database, make a copy of the PPLTLS84CUR project and name it PPLTLS84CURCOMP. You will use this project for the compare process.
 - a. If the PPLTLS84CUR project is not open, open it now.
 - b. Select File, Save Project As...
 - c. Name the project PPLTLS84CURCOMP.
4. On your Source database, perform a project compare of the PPLTLS84CURCOMP project against your Target database.
 - a. If the PPLTLS84CURCOMP project is not open, open it now.
 - b. Select Tools, Compare and Report...
 - c. Sign on to the Target database.
 - d. Verify that all object types are selected.
 - e. Select Options...
 - f. On the Compare Options tab, select Compare Type of Project.
 - g. Select a value for Target Orientation.
 - h. For Comparison by Release, select the highest release in the list.
 - i. Under Compare Languages, select Common and English.
 - j. If you have non-English languages loaded, select the other language(s) loaded into your database.
 - k. Click the Report Filter tab and click Default.
This will cause only customizations to appear on the compare reports.
 - l. Click OK.
 - m. Click Compare to start the compare process.

Note. To preserve the PPLTLS84CURCOMP compare reports, you must perform one of the following actions: 1) rename the reports, 2) move the reports to a different folder, or 3) reset the Compare Report Output Directory: Within Application Designer, select Tools, Options. On the General tab, change the path specified for the Report Output Directory.

5. Evaluate the compare reports to identify whether the delivered objects conflict with any of your customizations.

You will overwrite the customized objects with the new PeopleTools definitions when you copy the PeopleTools projects in a later task. You must not make any modifications that will affect PeopleTools objects when re-implementing your customizations after the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7: Exporting and Copying Projects

This section discusses:

- Understanding Exporting and Copying Projects
- Export and Copy PPLTLS84CUR Project
- Export and Copy PPLTLS84CURML Project
- Export and Copy PPLTLSML Project
- Export and Copy PPLTLS84CURDEL Project
- Export and Copy PATCH84X Project
- Export and Copy PATCH84XML Project

Understanding Exporting and Copying Projects

In this task, you export and copy projects.

PeopleSoft recommends that you verify the results of all copied projects. After a project has been copied, each object is identified with a checkmark in the Done column. You can view these results from the Upgrade tab in Application Designer. It is also recommended that you copy the PeopleTools projects with the take action flags set as they originally were set when the database was delivered.

Note. If you are running Sybase, check the configuration parameter for “open objects.” If this parameter is set too low, you may encounter the following error: `ct_connect(): network packet layer: internal net library error` during the compare or copy process. If you encounter this error, you will need to increase your parameter accordingly.

See Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer for your new release.

Task 4-7-1: Export and Copy PPLTLS84CUR Project

This process copies specified objects to the database that are necessary for the proper operation of PeopleTools. The PPLTLS84CUR project contains all PeopleTools objects that have been created or updated since PeopleTools 8.40 was released.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. PeopleSoft delivers the PPLTLS84CUR project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following examples:

```
Changed Action from CopyProp to Copy, definition does not exist on target.
Definition Name: OBJECTNAME not copied, entire definition already opied.
```

These warnings occur because the PeopleTools project contains fields along with their field label. This is necessary so the software does not overwrite any customized field labels on PeopleSoft field objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-2: Export and Copy PPLTLS84CURML Project

This process copies language-specific PeopleTools objects to the database that are necessary for the proper operation of PeopleTools.

Before the copy of records and fields, the upgrade process detects if the object definition exists or not. PeopleSoft delivers the PPLTLS84CURML project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels. When the upgrade process detects that a given field does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following example:

```
Changed Action from CopyProp to Copy, definition does not exist on target.
Definition Name: OBJECTNAME not copied, entire definition already copied.
```

This warning occurs because the PeopleTools project contains fields along with their field label. This is necessary so the software does not overwrite any customized field labels on PeopleSoft field objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	Canadian French Dutch Greek German Italian Japanese Korean Portuguese Simplified Chinese Spanish Swedish Traditional Chinese Thai Malay

Task 4-7-3: Export and Copy PPLTLSML Project

This process copies language-specific PeopleTools objects to the database that are necessary for the proper operation of PeopleTools.

Before copying records and fields, the upgrade process detects whether the object definition exists. PeopleSoft delivers the PPLTLSML project with an Action of `CopyProp` to prevent the possible overwrites of custom field labels and recfields. When the upgrade process detects that a given field or record does not exist, it changes that action so that the entire definition can be copied. You can ignore any errors you may receive at this time similar to the following examples:

```
Changed Action from CopyProp to Copy, definition does not exist on target.
Definition Name: OBJECTNAME not copied, entire definition already copied.
```

These warnings occur because the PeopleTools project contains fields along with their field labels. This is necessary so PeopleSoft does not overwrite any customized field labels on PeopleSoft field objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	Arabic Czech Danish Finnish French Hebrew Hungarian Norwegian Polish Russian Turkish

Task 4-7-4: Export and Copy PPLTLS84CURDEL Project

This process deletes specified PeopleTools objects from your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-5: Export and Copy PATCH84X Project

This process copies specified objects to the database that are necessary for the proper operation of PeopleTools.

Note. Perform this process only if you are applying a PeopleTools patch that includes a database project. Check the patch documentation to verify whether a database project was delivered with the patch.

See “Install the Software,” Installing the New Release.

Use Application Designer to perform the following steps.

To export and copy the project:

1. Log on to your Target database as a valid user.
2. Select Tools, Copy Project, From File...
3. In the Import Directory field, enter *PS_HOME\PROJECTS*.
4. Select the PATCH84X project from the list, where 84X corresponds to the PeopleTools release of the patch project. This should correspond with the PeopleTools release to which you are upgrading.

- Click Copy.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-7-6: Export and Copy PATCH84XML Project

This process copies language-specific PeopleTools objects to your database that are necessary for the proper operation of PeopleTools.

Note. Perform this process only if you are applying a PeopleTools patch that includes a database project. Check the patch documentation to verify whether a multilingual database project was delivered with the patch.

See “Install the Software,” Installing the New Release.

Use Application Designer to perform the following steps.

To export and copy the project:

- Log on to your Target database as a valid user.
- Select Tools, Copy Project, From File...
- In the Import Directory field, enter *PS_HOME\PROJECTS*.
- Select the PATCH84XML project from the list, where 84X represents the PeopleTools release of the patch project. This should correspond to the PeopleTools release to which you are upgrading.
- Click Options, and then select the Copy Options tab and verify that only the non-English languages that are installed are selected.

Note. The languages English and Common should not be selected.

- Click OK.
- Click Copy.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All Non-English

Task 4-8: Populating Tablespace Data

This section discusses:

- Populate Tablespace Data

- Update Tablespace Names

Task 4-8-1: Populate Tablespace Data

This step populates all tablespace information in the PSRECTBLSPC table. This step runs the SETSPACE.SQR script, which ensures that the correct tablespace information is populated for tasks later in the upgrade process.

The values stored in the DDLSPACENAME field are updated with current values found in the system catalog for tables already defined in your database. If you modified tablespace names from the PeopleSoft-delivered names, this step makes those same changes in the PeopleSoft record definition.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	Oracle Informix DB2 UNIX/NT DB2 z/OS	All

Task 4-8-2: Update Tablespace Names

The SETSPACE.SQR script identifies the tables with an invalid database name/tablespace combination. However, the PeopleTools Metadata tables in your Target database contain the database/tablespace values from the Demo (Source) database. This also occurs if your Demo and Target databases are in the same DB2 subsystem after the upgrade/copy is completed. SETSPACE.SQR corrects these values for those tables defined in DB2. For those tables that are defined in the PeopleTools metadata tables, but have not been defined in DB2, you need to review the SETSPACE.SQR script for those tables that are reported as not defined in the database, but where the database/tablespace combination is valid. If the report shows an invalid database/tablespace combination, or shows your Demo (source) database and tablespace names instead of your Target database and tablespace names, you can correct the database and tablespace names using one of the following options:

- Generate the alter/create scripts and globally edit the scripts, changing the database/tablespace values to those of your Target.
- Directly update the PSRECTBLSPC table with your Target database names before generating the alter/create scripts. This will ensure that the database name/tablespace names in the generated alter/create scripts will be correct. The syntax to update the PSRECTBLSPC table is as follows:

```
UPDATE PSRECTBLSPC SET DBNAME = dbname, DDLSPACENAME = tablespace name WHERE⇒
DDLSPACENAME = tablespace identified in SETSPACE OUTPUT AND DBNAME = database⇒
identified in SETSPACE OUTPUT;
```

If you are using the PeopleSoft-delivered tablespaces, you can omit the references to DDLSPACENAME in the SQL statement above.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS	All

Task 4-9: Building Updated PeopleTools Project

This section discusses:

- Generate Updated PeopleTools Script
- Edit the Updated PeopleTools Script
- Run the Updated PeopleTools Script

Task 4-9-1: Generate Updated PeopleTools Script

This step generates the SQL script to create and alter records of the type table that are delivered in the PPLTLS84CUR project. The tables are altered to add new columns, rename existing columns, and change columns that have modified properties, such as length, and delete columns. The script will also create new indexes, re-create modified indexes, and create triggers. The script name is:

PPLTLS84CURTABLES.SQL

Note. For DB2 z/OS sites, if this step takes an exceptionally long time, performing a RUNSTATS on the system catalog tablespace SYSDBASE may improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-9-2: Edit the Updated PeopleTools Script

In this step, you edit the PPLTLS84CURTABLES.SQL script that was generated in the previous step for tablespace names and sizing. If you are running on a relational database management system (RDBMS) platform that uses tablespaces, and you are *not* using the PeopleSoft tablespace names, have your database administrator review this script and modify the tablespace names appropriately. The script can be found in your Change Assistant output directory for this upgrade path.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 4-9-3: Run the Updated PeopleTools Script

This step runs the script you generated in this task to create all records of the type table. This creates new table structures, alters existing PeopleSoft table structures, creates new indexes, re-creates modified indexes, and creates triggers.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-10: Migrating Records to New Tablespaces

This section discusses:

- Understanding Migration of Records to New Tablespaces
- Export and Copy the PT84TBLSPC Project
- Build the Tablespace Alter Script
- Edit the Tablespace Alter Script
- Run the Tablespace Alter Script

Understanding Migration of Records to New Tablespaces

In this task you migrate the tables delivered in the PT84TBLSPC project to the correct tablespaces.

Task 4-10-1: Export and Copy the PT84TBLSPC Project

This process copies the records that moved to different tablespaces in the new release of PeopleTools. The upgrade copy options are set to “Copy From Source” for record DDL to pick up the new tablespace information.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 4-10-2: Build the Tablespace Alter Script

This step generates the SQL script to alter records of the type table that are delivered in the PT84TBLSPC project. The tables are altered to move them to the correct tablespaces for the new release of PeopleTools. The script name is:

TABLESPACEALERTABLES.SQL

Note. For DB2 z/OS sites, if this step takes an exceptionally long time, performing a RUNSTATS on the system catalog tablespace SYSDBASE may improve performance.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 4-10-3: Edit the Tablespace Alter Script

In this step, you edit the TABLESPACEALERTABLES.SQL script for tablespace names and sizing. If you are running on an RDBMS platform that uses tablespaces, and you are *not* using the PeopleSoft tablespace names, you need to review and modify the scripts above. Have your database administrator review these scripts and modify the tablespace names appropriately. The script can be found in your Change Assistant output directory for this upgrade path.

Note. If you are a DB2 z/OS customer, you must edit the scripts for database name regardless of whether you are using the delivered PeopleSoft tablespace names.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 4-10-4: Run the Tablespace Alter Script

This step runs the TABLESPACEALTERTABLES.SQL script to move the tables to the new tablespaces.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 z/OS DB2 UNIX/NT Oracle Informix	All

Task 4-11: Loading Base Data

These Data Mover scripts (DMSs) initialize and modify the data in various PeopleTools tables required for the system to execute properly. This step runs scripts conforming to the PTxxxTLS.DMS and PTxxxTLSyyy.DMS naming conventions that are greater than your current PeopleTools release, where xxx represents a PeopleTools release number and yyy represents a three-letter language code. For some upgrades, no data scripts are required. In this case, Change Assistant continues to the next step without producing a log file.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-12: Loading Language Data

This section discusses:

- Populate Languages

- Load Language Data

Task 4-12-1: Populate Languages

This step runs the PSLANGUAGES.DMS script. This script populates the PSLANGUAGES table with Verity Locale data and other language-specific data.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-12-2: Load Language Data

If your database has languages installed in addition to English, you must populate the PSLANGUAGES table.

To load language data:

1. From the DMS that was created for your PeopleSoft 8.x database installation, find the UPDATE to PSLANGUAGES. The statement should look similar to the following:

```
UPDATE PSLANGUAGES SET INSTALLED=1 WHERE LANGUAGE_CD = 'xxx' ;
```

2. Run the SQL command identified above using your SQL tool.

Your database is now updated with the language data.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All Non-English

Task 4-13: Loading PeopleTools Data

This section discusses:

- Load NonComparable Objects
- Load English Messages
- Load English String Data
- Load Stored Statements Data

Task 4-13-1: Load NonComparable Objects

This step runs the TLSUPGNONCOMP.DMS script. This script loads the TLSUPGNONCOMP project and all PeopleTools-owned object definitions that cannot be delivered using Copy Project to File.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	All

Task 4-13-2: Load English Messages

This script loads English messages into your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	English

Task 4-13-3: Load English String Data

This step runs the PTSTRENG.DMS script, which loads English string data into the STRINGS_TBL table.

Note. The non-English language data was loaded in the task “Loading Base Data.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-13-4: Load Stored Statements Data

Loading the stored statements ensures that the dynamic SQL statements will work correctly with the delivered COBOL programs.

This script loads the dynamic SQL used by the PeopleTools-delivered COBOL.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-14: Loading PeopleTools Definition Group

This task runs the PTDEFNSEC.DMS script that loads the PeopleTools definition security group. This ensures that the definition security group is updated with the PeopleTools objects introduced in this release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15: Converting PeopleTools Objects

This section discusses:

- Update REN Server Configuration
- Populate MCF Data
- Convert Portal Objects
- Convert Query Prompt Headings
- Encrypt Connector Passwords
- Load Conversion Data
- Report Conversion Details
- Run Data Conversion
- Complete PeopleTools Conversion

Task 4-15-1: Update REN Server Configuration

This step runs the Application Engine program UPGMCF843, which converts real-time event notification (REN) server configuration information to the new format. REN servers run in the application server domain. They are used for the PeopleTools MultiChannel Framework (MCF) and Reporting Window output option. The program converts standard REN server configurations to the new format, including MCF cluster information. All REN server configuration information is now stored within the database. You must upgrade old REN server configurations before attempting to boot with the new version of PeopleTools. If you did not have any REN servers configured prior to starting the upgrade, then the UPGMCF843 program does not make any changes. If one of your configurations cannot be converted, error messages will be written in the Application Engine message log.

After running this step, you should also check the PSRENCONFIG.TXT file located in each application server domain that started an old REN server. (The file will not exist in domains that did not start a REN server.) Each old file should be replaced with the new template file located at PS_HOME/APPSEV/REN/PSRENCONFIG.TXT. Old template files cannot be used with the new version of REN server. If you customized your old configuration files, manually edit the new files and update them with your customizations.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-2: Populate MCF Data

This step runs the Application Engine program MCF_UPGR_SND, which populates the PS_MCFEM_MAIL_DSCR table with data. In PeopleTools 8.44, the REPLY_TO header functionality was added. The field PS_MCFEM_MAIL_DSCR.MCF_REPLY_TO is populated with the values stored in PS_MCFEM_MAIL_MAIN.MCF_EMAIL_SENDER.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-3: Convert Portal Objects

This step runs the Application Engine program UPG844PORTAL, which splits PSPRSMDEFN.PORTAL_URLTEXT into segments and stores them in separate columns: PORTAL_URI_SEG1, PORTAL_URI_SEG2, PORTAL_URI_SEG3, and PORTAL_URI_SEG4. This is performed for PeopleSoft Component URLs to extract values for Menu, Component, and Market. Values for Record, Field, Event, and Function Names are extracted from Iscript URLs.

You may see some errors or messages in your log. Following is a list of some of the errors and what to do about them:

- Not authorized CRef: *Portal Object Name* (95,5032).

This means that you do not have proper privileges to run this conversion. You need to grant the user ID that you are using to upgrade Portal Administrator permissions.

- Security synchronization failed for Portal Object: *Portal Object Name* (96,61).

This is not a fatal error. It may be caused by a content reference that contains invalid URL text and indicates that there was an internal error writing to the security table. The invalid URL text may be pointing to a component or script that does not exist in the database. You need to fix the content reference and then rerun the UPG844PORTAL process.

- Cref *Portal Object Name* points to Menu: *Menu Name*, Component *Component Name* which doesn't exist. (96,80).

The content reference is pointing to an invalid Menu/Component combination. You need to fix the content reference so that it points at a valid Menu/Component combination and then rerun the UPG844PORTAL process.

- Duplicate key. Portal: *Portal Name*, Obj Name: *Portal Object Name*, Nodename: *Node*, URL: *URL* (133,4).

This Portal object has the same URL as another Portal object. Delete or modify this object to remove the conflict and then rerun the UPG844PORTAL process.

See Enterprise PeopleTools PeopleBook: Internet Technology for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-4: Convert Query Prompt Headings

This step runs the Application Engine program UPGQRYDUPHED, which searches for duplicate prompt headings in the table PSQRYBIND and appends numbers onto the text. For example, *Item ID* would become *Item ID 2*. When you run Crystal 9 through the process scheduler, it cannot handle queries with two or more prompts that have the same heading. These duplicates are also not legal in Query. You need to alter any old queries that have duplicate prompt headings so that they work with Crystal 9.

If you find a duplicate heading that exceeds the length of the field HEADING, you need to manually change the heading. In these cases, the following error is written to the log file:

```
The prompt heading HEADING for Query QUERY is duplicated. Please manually correct.⇒
(108, 1108)
```

See Enterprise PeopleTools PeopleBook: PeopleSoft Query for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-5: Encrypt Connector Passwords

This step runs the Application Engine program UPGRDPASSWDS, which encrypts the password property field for the POP3Target, FTPTarget, GetMailTarget, and JMSTarget connectors.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-6: Load Conversion Data

This step imports PeopleTools data conversion Application Engine driver data into your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-7: Report Conversion Details

This step runs the PTUCONV.SQR script. It details which sections will be called by the Upgrade Driver program and what they are doing. Each of the upgrade data conversion sections contains comments that describe the processing done by the section. The information contained in the report is used to evaluate the conversions run in the next step and any actions that are required as a result of the conversion.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-8: Run Data Conversion

The Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with the group number of 01 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. After running PTUPGCONVERT, review the output data generated in the previous step for more details.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-15-9: Complete PeopleTools Conversion

The PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with a group number of 02 and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-16: Creating All Views

In this step, you will run the CREATEVW.DMS script to re-create all of your views.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17: Converting Integration Broker

This section discusses:

- Understanding Converting Integration Broker
- Updating Integration Broker Defaults
- Creating Integration Broker Objects
- Saving Application Messaging Objects
- Exporting Node Transactions
- Preparing Integration Broker Deletes
- Deleting Application Messaging Objects
- Deleting Node Transactions

Understanding Converting Integration Broker

If you are upgrading from PeopleTools 8.48 or later, this task does not need to be run since the Integration Broker conversion has already been performed. You may mark all of the steps in this task as “Complete” in your upgrade job. If you don’t mark these steps as complete, the upgrade will try to unnecessarily reconvert your objects.

Task 4-17-1: Updating Integration Broker Defaults

This step runs the PTIBUPGRADE.DMS script. This script populates the default values specified earlier in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17-2: Creating Integration Broker Objects

The PeopleTools Upgrade Driver Application Engine program, PTUPGCONVERT, runs additional PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with a group number of 03 and ordering them by the row sequence number. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the sequence number order. Review the report generated by PTUCONV.SQR for details on the conversions run in this step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17-3: Saving Application Messaging Objects

This step copies the PTUPGIBCLONE project to the *PS_HOME*projects directory. This project was created by the UPGPT848IBUG Application Engine program and contains objects that were successfully converted. The objects are copied to file as a precautionary measure since they will be deleted from the upgrade database.

After running this step, save the exported project in a permanent location where it can be accessed post-upgrade in case there is a need to review or import the old objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17-4: Exporting Node Transactions

This step runs PTUPG_TRX_EXPORT.DMS to save out the old pre-conversion node transaction data. The generated .dat file is written to the DataMover output directory defined in Configuration Manager, which should be your *PS_HOME*data directory.

After running this step, save PTUPG_TRX_EXPORT.DAT in a permanent location where it can be accessed post-upgrade in case there is a need to review or import the old objects.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17-5: Preparing Integration Broker Deletes

This step copies the PTUPGIBDELETE project to your *PS_HOME\projects* directory in preparation for deleting the obsolete pre-conversion object definitions from the upgrade database. This project was created by the UPGPT848IBUG Application Engine program and contains the same objects as PTUPGIBCLONE.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17-6: Deleting Application Messaging Objects

This step copies the PTUPGIBDELETE project definition from file. Since the actions in the project are set to Delete, this will delete the obsolete pre-conversion object definitions from the upgrade database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-17-7: Deleting Node Transactions

This step runs PTUPG_TRX.dms, which removes obsolete node transaction data associated with the obsolete objects in the PTUPGIBDELETE project. This script was generated by the UPGPT848IBUG Application Engine program.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-18: Creating All Triggers

This task uses a DMS to create all triggers. Database triggers are database objects that are used to update tables with version information for PeopleSoft Mobile and Optimization functionality.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-19: Regenerating Sync IDs

This task executes the AE_SYNCIDGEN Application Engine program to regenerate synchronization IDs. PeopleTools uses synchronization IDs to give each row a unique identifier.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-20: Updating Object Version Numbers

In this task, you run the VERSION Application Engine program. This ensures that all of your version numbers are correct and, if not, resets them to 1.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 4-21: Backing Up After PeopleTools Upgrade

Back up your upgrade database now. This enables you to restart your upgrade from this point, in case you experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 5

Complete Database Changes

This chapter discusses:

- Understanding Database Changes
- Updating Language Data
- Booting Servers
- Setting Up Security
- Reviewing PeopleTools Functionality
- Running the Final Audit Reports
- Reviewing Change Control

Understanding Database Changes

You made various changes in the previous chapters, and now it is time to complete these changes and test your upgraded database. You will run reports to audit your database and then turn Change Control back on.

Task 5-1: Updating Language Data

This section discusses:

- Understanding Updating Language Data
- Run the TSRECPOP Script

Understanding Updating Language Data

In this task, you run scripts to modify data in PeopleTools related language tables.

Note. For DB2 z/OS customers, PeopleSoft recommends that you run RUNSTATS against the system catalog tables at this time.

Task 5-1-1: Run the TSRECPOP Script

In this step, the TSRECPOP script initializes and modifies the data in PeopleTools related language architecture tables.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-2: Booting Servers

Clear your client workstation browser cache and boot your application servers, web servers, and process scheduler servers.

See the Enterprise PeopleTools installation guide for your database platform on your new release.

Note. After applying this release, the Help, About dialog box will show the version of PeopleTools to which you upgraded.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-3: Setting Up Security

This section discusses:

- Understanding Security
- Synchronize CREF Permissions

Understanding Security

In this task you perform steps to set up security, grant access to the user ID, set up permissions lists, and grant access to navigation and homepages.

Task 5-3-1: Synchronize CREF Permissions

This section discusses:

- Understanding Content Reference Permissions
- Running the Portal Security Synchronization Process

Understanding Content Reference Permissions

As part of the PeopleTools 8.4x Portal architecture, Portal Registry Structures reference permission lists. At this point, however, the Portal Registry Structures copied from the PPLTLS84CUR project do not reference any permission lists on the Upgrade database. This synchronization program will match the existing permission lists to the appropriate Registry Structures and update it.

Note. The user ID that invokes this process must have the security role Portal Administrator. Otherwise, the process may terminate abnormally.

Note. Your Process Scheduler must be running in order to perform this task.

Running the Portal Security Synchronization Process

Follow the steps below to run the Portal security synchronization process.

To run the security synchronization process:

1. From your browser, sign on to your Target database.
2. Select PeopleTools, Portal, Portal Security Sync.
3. Select Add a New Value.
4. Enter the run control ID *UPG_PORTAL_SYNC_BOTH*.
5. Click Add.
6. Keep the default value for the default portal registry name in the Portal Name field (for example: *EMPLOYEE*, *CUSTOMER*, or *SUPPLIER*).
7. Click Save.
8. Click Run.
9. In the Process Scheduler page, check that you set your parameters correctly.
10. Click OK.
11. Click the Process Monitor link to monitor the program's process.
12. Repeat steps 6 through 11 for each Portal name used in the database for your specific applications. With each repeat, in step 6 change the Portal Name field to one of the following: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, *MOBILE*, and so on.
13. Review any messages received during the running of this process with your Portal Administrator.

See Enterprise PeopleTools PeopleBook: Internet Technology for your new release.

Note. If the permission lists for your upgrade user do not allow you access to a component, you will encounter this error when running the security synchronization process for that page: *Security synchronization failed for Portal Object*. This error may indicate other problems with the component or folder, but you should check your security first.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-4: Reviewing PeopleTools Functionality

The PeopleBooks detail the current PeopleTools functionality. There are many new features delivered in the new release that you may wish to use. You should now review the PeopleSoft Enterprise PeopleBooks and PeopleTools Installation Guide in order to configure your environment properly. This may include, but is not limited to, configuring and starting a process scheduler, report server, and reviewing portal settings.

See the Enterprise PeopleTools installation guide for your database platform on your new release.

See PeopleSoft Customer Connection (Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes).

- If you applied a PeopleTools patch earlier in the upgrade, review the patch documentation and run any steps that you have not already performed during the upgrade. Check your Change Assistant output directory if you do not know whether a script was already run during the upgrade process.
- PeopleTools has updated the styles that define the look of the user interface. The classic (old) style sheet, as well as two new styles, are delivered with this release of PeopleTools. PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. After the PeopleTools portion of the upgrade, PeopleSoft sets the classic style as the default, but you can update to one of the new user interface styles.

See Appendix: “Changing the User Interface.”

Note. The new user interface styles are supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If you are using any other browser or release, the system defaults to the classic style.

- PeopleTools uses Verity release 5.0 to implement free text search. Verity 5.0 is not compatible with the version of Verity that was used in previous PeopleTools releases. Check the necessary application patches that may be required in order to use the new version of Verity.

See PeopleSoft Customer Connection (Updates + Fixes, Required for Install or Upgrade).

- Integration Broker was rewritten in PeopleTools 8.48. If you use Integration Broker, you will need to perform setup configuration and review the explanation of metadata mapping.

See Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Integration Broker.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5: Running the Final Audit Reports

This section discusses:

- Run the Final DDDAUDIT Report
- Run the Final SYSAUDIT Report
- Create the FNLALTAUD Project
- Run the Final Alter Audit
- Review the Final Audits

Task 5-5-1: Run the Final DDDAUDIT Report

DDDAUDIT is an SQR that compares your production SQL data tables with the PeopleTools record definitions to uncover inconsistencies. You can expect some errors from this report. You will review the output from the report in another step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-2: Run the Final SYSAUDIT Report

SYSAUDIT is an SQR that identifies *orphaned* PeopleSoft objects. For example, SYSAUDIT will identify a module of PeopleCode that exists but does not relate to any other objects in the system. SYSAUDIT also identifies other inconsistencies within your database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-3: Create the FNLALTAUD Project

In this step, you create the FNLALTAUD project and use it to run your final Alter Audit. Creating this new project now ensures that all the records in your system are audited, including SQL tables and temp tables. This project also includes any custom records that you have created in your system.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-4: Run the Final Alter Audit

Run the PeopleTools alter record process on all tables in your system to check whether the PeopleTools definitions are synchronized with the underlying SQL data tables in your database. PeopleSoft calls this process an Alter Audit. Alter Audit compares the data structures of your database tables with the PeopleTools definitions to uncover inconsistencies. Alter Audit then creates an SQL script with the DDL changes needed to synchronize your database with the PeopleTools definitions.

The Alter Audit script is built using the FNLALTAUD project created in the previous step.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-5-5: Review the Final Audits

The Alter Audit process creates SQL scripts that correct any discrepancies between your PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies noted by running the generated scripts with your platform-specific SQL tool. The script names are:

```
FNLALTAUD_ALTTBL.SQL
FNLALTAUD_CRTIDX.SQL
```

Note. The Alter Audit process also creates the script FNLALTAUD_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, since all database triggers were created in a previous task.

Note. For Informix sites, if your database has Application Functions, you use SQL to drop and re-create these functions and their associated indexes, even though the underlying tables and indexes have not changed.

Note. For Microsoft SQL Server and DB2 UNIX platforms, if your database has tables containing the MSSCONCATCOL or DBXCONCATCOL column, you will see SQL alter the tables and re-create their associated indexes, even though the underlying tables and indexes may not have changed.

Review the output from the SYSAUDIT and DDDAUDIT reports and correct any discrepancies.

Your DDDAUDIT listing shows some expected discrepancies. Tables and views deleted from the Application Designer are not automatically deleted from the system tables. PeopleSoft takes this precaution in case you have customized information that you want to preserve. Therefore, the report lists any tables and views that the new release does not have. Review these tables to verify that you do not wish to preserve any custom data, and then drop the tables and views.

Your SYSAUDIT report may have some errors due to references to obsolete PeopleSoft-owned objects. For instance, if PeopleSoft deletes a Permission List, and you have a Role that still refers to that Permission, then it will appear on the SYSAUDIT report.

See Enterprise PeopleTools PeopleBook: Data Management for your new release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

Task 5-6: Reviewing Change Control

Earlier in the upgrade process, in the beginning of the chapter “Apply PeopleTools Changes,” the Change Control feature was disabled. In this step, you re-enable Change Control, if your site uses this functionality.

To turn on Change Control:

1. Sign on to the Target database using Application Designer.
2. Select Tools, Change Control, Administrator.

The following dialog box appears:



Change Control Administrator dialog box

3. Set Use change control locking and Use change control history according to your site specifications.

See “Apply PeopleTools Changes,” Turning Off Change Control.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	All	All

CHAPTER 6

Appendices

Understanding Appendices

The appendices portion of this documentation contains information you may need for your upgrade. The appendices have been referenced throughout the upgrade documentation for further understanding of the upgrade you are performing. PeopleSoft recommends that you read each appendix as it is referenced in the documentation.

APPENDIX A

Changing the User Interface

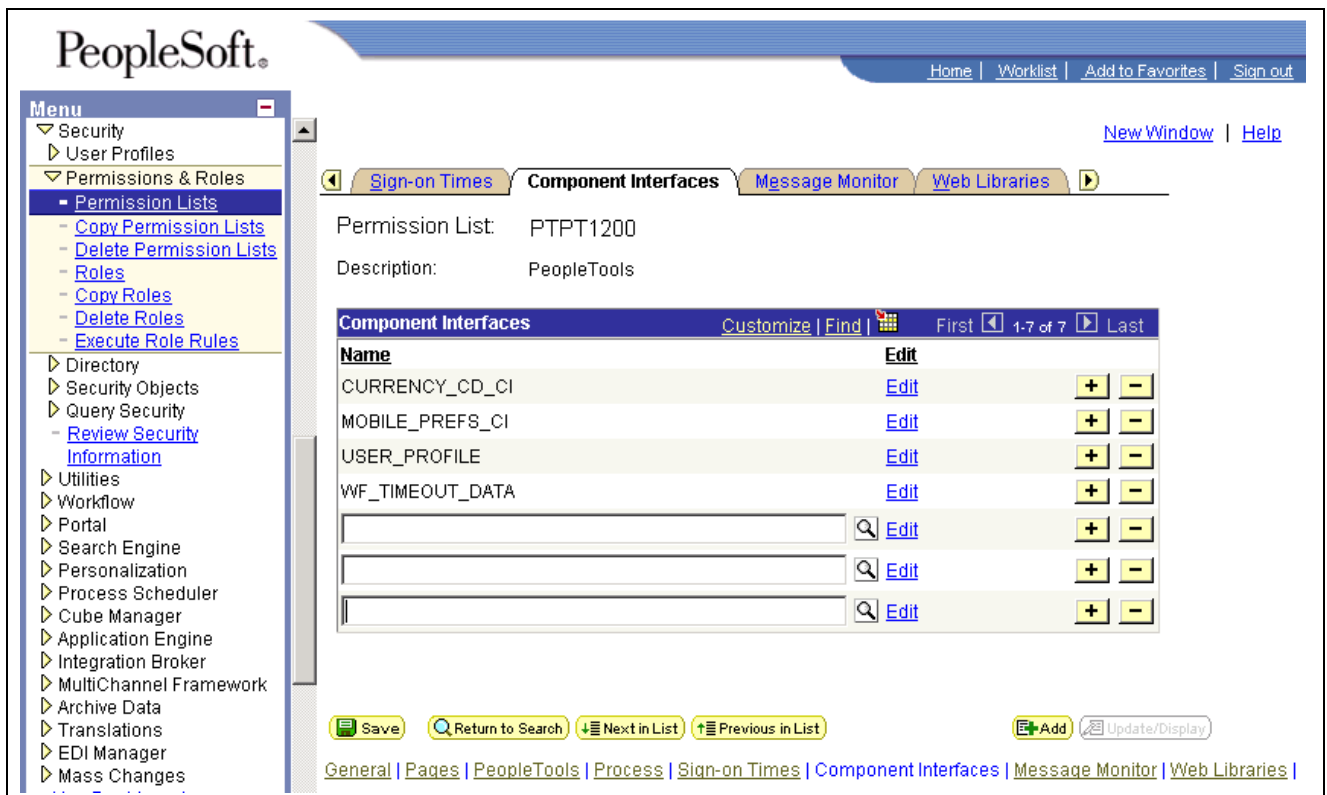
This appendix discusses:

- Change the User Interface
- Change the User Interface for Mobile

Task A-1: Change the User Interface

Three user interface options were delivered with your current release of PeopleSoft 8.x. The classic style, the style seen in previous releases of your PeopleSoft application, is set as your default style. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The classic style, shown below, is set as your default style delivered with your PeopleSoft release.



The classic style user interface option

The following example represents the light blue style.

The screenshot shows the PeopleSoft user interface in a light blue style. The top navigation bar includes links for Home, Worklist, Add to Favorites, and Sign out. The left-hand menu is expanded, showing the 'Permissions & Roles' section with sub-items like 'Permission Lists', 'Copy Permission Lists', 'Delete Permission Lists', 'Roles', 'Copy Roles', 'Delete Roles', and 'Execute Role Rules'. The main content area displays the 'Component Interfaces' tab for 'Permission List: PTPT1200' and 'Description: PeopleTools'. A table lists several component interfaces with their names and edit links. The bottom of the screen shows a series of tabs: General, Pages, PeopleTools, Process, Sign-on Times, Component Interfaces, Message Monitor, and Web Libraries.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Help

Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries

Permission List: PTPT1200
Description: PeopleTools

Component Interfaces Customize | Find | First 1-7 of 7 Last

Name	Edit		
CURRENCY_CD_CI	Edit	+	-
MOBILE_PREFS_CI	Edit	+	-
USER_PROFILE	Edit	+	-
WF_TIMEOUT_DATA	Edit	+	-
	Edit	+	-
	Edit	+	-
	Edit	+	-

Save Return to Search Next in List Previous in List Add Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries |

The light blue style user interface option

This example represents the dark blue style.

The screenshot shows the PeopleSoft user interface in a dark blue style. The layout is identical to the light blue version, but the color scheme is darker. The top navigation bar, left-hand menu, and main content area all feature a dark blue background with white text. The 'Component Interfaces' table and the bottom tabs remain in their original colors, providing a contrast with the dark blue background.

PeopleSoft.

Home | Worklist | Add to Favorites | Sign out

New Window | Help

Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries

Permission List: PTPT1200
Description: PeopleTools

Component Interfaces Customize | Find | First 1-7 of 7 Last

Name	Edit		
CURRENCY_CD_CI	Edit	+	-
MOBILE_PREFS_CI	Edit	+	-
USER_PROFILE	Edit	+	-
WF_TIMEOUT_DATA	Edit	+	-
	Edit	+	-
	Edit	+	-
	Edit	+	-

Save Return to Search Next in List Previous in List Add Update/Display

General | Pages | PeopleTools | Process | Sign-on Times | **Component Interfaces** | Message Monitor | Web Libraries |

The dark blue style user interface option

See Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer for your new release.

To change your styles, you must delete the substyle sheets associated with the classic style and replace them with either the light or dark blue substyle sheet.

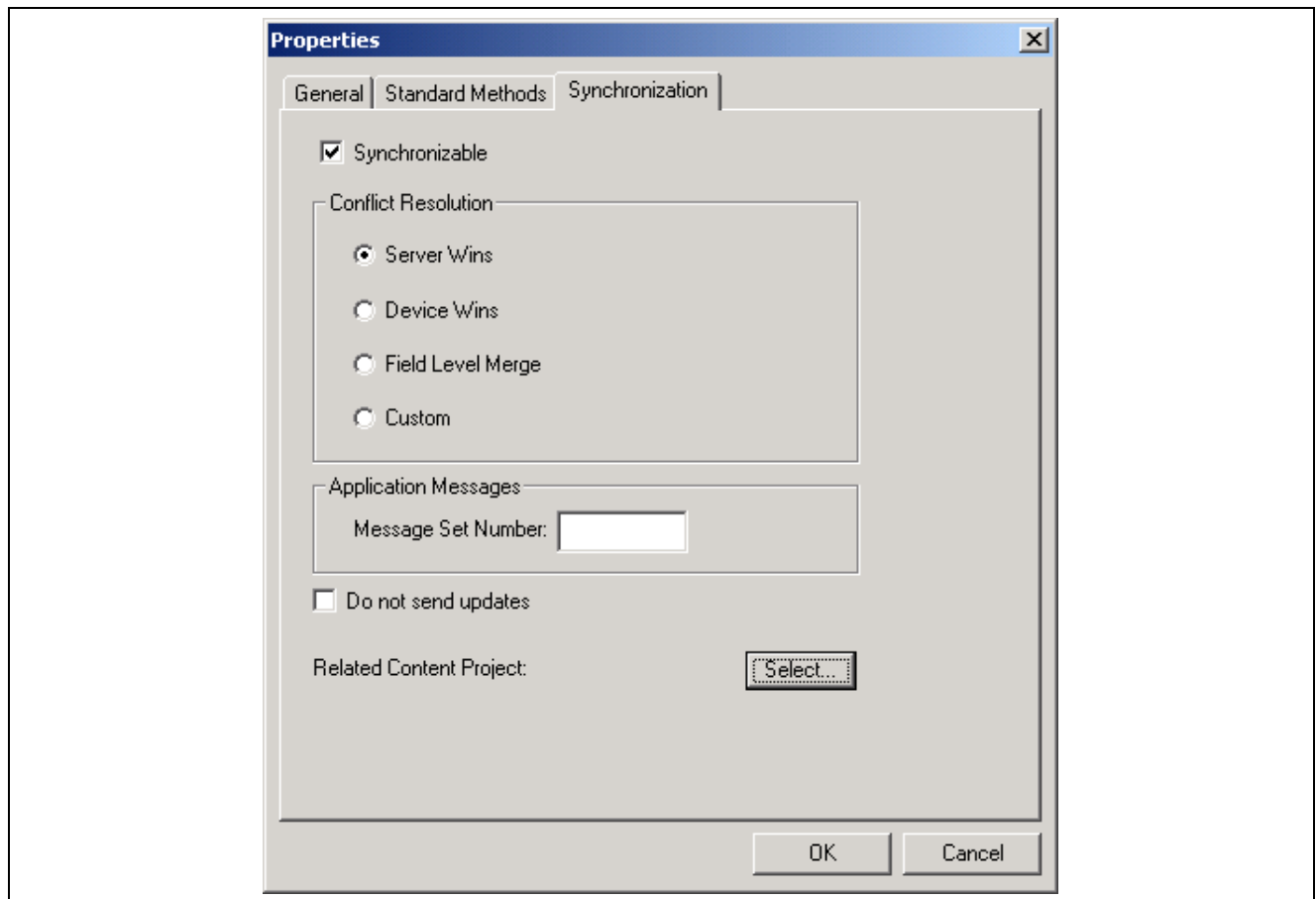
Note. The new user interface looks are supported by Internet Explorer release 5 and above and Netscape Navigator release 6 and above. If using a browser and release other than these, the system defaults to the classic style.

To enable one of the new user interface looks:

1. In Application Designer, open the stylesheet PSSTYLEDEF.
2. Click on the PSALTERNATE Sub Style Sheet, and press Delete.
3. Select Insert, Insert Sub Style Sheet.
4. Select PSALTERNATE_LIGHTBLUE or PSALTERNATE_DARKBLUE.
5. Repeat steps 1 through 4 for the PTSTYLEDEF and PSACE Sub Style Sheets, making sure to use the same extension (_LIGHTBLUE or _DARKBLUE) as you did for PSALTERNATE.
6. Select Save.
7. Open the stylesheet PSQUERYSTYLEDEF.
8. Click on the PTQUERYSTYLESUB Sub Style Sheet, and press Delete.
9. Select Insert, Insert Sub Style Sheet.
10. Select PTQUERYSTYLESUB_LIGHTBLUE or PTQUERYSTYLESUB_DARKBLUE. Use the same extension as you did in Step 4.
11. Select Save.

Task A-2: Change the User Interface for Mobile

You use Related Content Projects to synchronize extraneous PeopleTools objects to a mobile device. In particular, you can use a Related Content Project to synchronize a new or customized stylesheet to the mobile device. Related Content Projects are associated with a Component Interface. PeopleSoft recommends that you associate a given Related Content Project with a synchronizable Component Interface that is common to your mobile application.



The Synchronization tab

To change the user interface look for mobile applications:

1. Follow the procedure above to add the new or customized stylesheet to a PeopleTools Project.
2. In Application Designer, open a synchronizable Component Interface that is common to your mobile application.
3. Open the Properties dialog box from the pop-up menu.
4. Select Synchronization.
5. Click Select for the Related Content Project.
6. Find and highlight the desired project and click Select.
7. Select Save.

The stylesheet will be synchronized to the mobile device during the next Bootstrap or Update Applications synchronization.

See Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces for your new release.

See Enterprise PeopleTools PeopleBook: PeopleSoft Mobile Agent for your new release.

APPENDIX B

Performance Tips and Techniques

This appendix discusses:

- Understanding Performance Tips and Techniques
- Plan Your Upgrade for Performance
- Improve Performance for Your Platform
- Consult the Global Support Center

Understanding Performance Tips and Techniques

Performance is always a challenge when you are upgrading. Much of the data currently in your database will be affected. No other batch processing works quite like it. Upgrade performance is sensitive to your unique environment and data. These performance recommendations are designed to help you improve performance during your upgrade.

Task B-1: Plan Your Upgrade for Performance

Review the following guidelines to help plan for better upgrade performance:

- Provide as much hardware, memory, and disk space as you can.
- Run long processes on a dedicated server, not the client. Configure that server similarly to your production environment.
- Use a dedicated workstation, configured like the production environment.
- Provide an application server and process scheduler for the Target database on the new PeopleSoft release.
- Look for fragmented tables. Resize or reorganize the initial and next extends accordingly.
- Know which tables are your largest. This information will be valuable during the upgrade.

Task B-2: Improve Performance for Your Platform

This section discusses:

- Oracle

- DB2

Task B-2-1: Oracle

You should use the cost-based optimizer during the upgrade. The application engine scripts use MetaSQL to run the Update Statistics command at various times during data conversion. If you are running the Rule-based optimizer, you will not take advantage of these statements.

When running the alter scripts, remember the Oracle hint `/*APPEND*/`. This command will improve the performance of your alter script if you are doing an “Alter by Rename.” This hint performs like an Oracle Direct Load Insert and does not capture redo or recovery information. The syntax is as follows:

```
INSERT /*+ APPEND */ INTO TABLENAME (FIELD1, FIELD2, ...
```

Make sure your database administrator has turned autoextend on. Autoextend allows tablespaces to grow larger than their set maximum size and will be useful during the upgrade process since tablespaces grow several times larger than they would in production.

Alter the tablespace for PSIMAGE and increase it to 200 MB; autoextend on the next 10 MB; set the maxsize to *unlimited*.

Task B-2-2: DB2

Perform all recommended update statistics on the system catalog as well as the application tablespaces.

Review the DEFINE NO option for index creation. Warning messages are generated when creating indexes on empty tables if this option is set.

See Enterprise PeopleTools Installation Guide for DB2 UDB for z/OS, “Creating a Database,” Creating Indexes, for your new release.

Task B-3: Consult the Global Support Center

If you do have a problem with your upgrade, contact the Global Support Center (GSC). PeopleSoft will be able to give you a solution to the problem faster if you supply the following information:

- Include details about the table row counts and indexes available on the tables involved in the processing:
 - Include indexes in your physical database, not those defined in Application Designer.
 - Mention any additional indexes that you custom-added; they could be getting in the way.
- Include the relational database management system (RDBMS)—Oracle, SQL Server, DB2, and so on—and the release (for example, Oracle 7.3, 8.16, and so on).
- If you are running on Oracle, specify whether you are you running in cost-based or rule-based mode.
- Include your PeopleTools upgrade path (for example, PeopleTools 8.40 to 8.41).
- Provide trace files: Tools trace and RDBMS-specific trace files, SQL Explains, and so on.

Index

A

- AE_SYNCIDGEN program 63
- Alter Audit
 - final, reviewing 70
 - final, running 70
 - running initial 7
- application messaging
 - objects, deleting 62
 - objects, saving 61
- application servers
 - backing up PeopleTools directories 21
 - booting 66
 - granting administrator permissions 13
 - installing PeopleTools software 21
 - setting up 22
 - shutting down 20
 - updating REN servers 56
- applying PeopleTools patch 21
- audits
 - Alter Audit 7
 - DDDAUDIT, final 69
 - DDDAUDIT, initial 6
 - final 69
 - initial 6
 - SYSAUDIT, final 69
 - SYSAUDIT, initial 6

B

- backing up
 - after PeopleTools upgrade 63
 - PeopleTools directories 21
- base data, loading 53
- batch servers
 - backing up PeopleTools directories 21
 - installing PeopleTools software 21
 - setting up 22
- booting servers 66
- building
 - tablespace alter script 52

C

- Change Assistant
 - creating jobs 24
 - editing multilingual step properties 35
 - finalizing documentation 27

- installing 24
- reviewing upgrade step properties 3
- setting a profile in Configuration Manager 25
- setting up 24
- understanding 19
- change control
 - reviewing 71
 - turning off 40
- common components Pagelet Wizard data, deleting 16
- configuration files 20
- Configuration Manager 25
- connect ID, granting privileges to 38
- connector passwords, encrypting 58
- contacting global support 80
- content reference permissions, synchronizing 66
- conversion
 - loading data 58
 - reporting details 59
 - running data conversion 59
- converting
 - Integration Broker 60
 - PeopleTools objects 56
 - Portal objects 57
 - query prompt headings 58
- Copy of Current Demo database 3
- Copy of Production database
 - backing up 63
- copying
 - PATCH84X project 47
 - PATCH84XML project 48
 - PPLTLS84CUR project 44
 - PPLTLS84CURDEL project 47
 - PPLTLS84CURML project 45
 - PPLTLSML project 46
 - projects 44
 - PT84TBLSPC project 51
- creating
 - Change Assistant jobs 24
 - FNLALTAUD project 70
 - Integration Broker objects 61
 - RUNSTATS.DAT 39
 - triggers 62

views, all 60
 customized configuration files 20

D

data
 base data, loading 53
 conversion data, loading 58
 data conversion, running 59
 English messages, loading 55
 English string data, loading 55
 language data, loading 54
 language data, updating 65
 MCF data, populating 57
 PeopleTools data, loading 54
 stored statements data, loading 55
 data conversion
 loading data for PeopleTools 58
 reporting details 59
 running for PeopleTools changes 59
 data model definitions, loading
 DB2 UNIX/NT 41
 DB2 z/OS 40
 Informix 41
 Oracle 41
 SQL Server 41
 Sybase 42
 understanding 40
 database servers
 installing PeopleTools software 21
 database servers, backing up 63
 databases
 Copy of Current Demo 3
 Demo 1
 performance tips 79
 preparing for the upgrade 13
 verifying integrity 14
 DB2 UNIX/NT
 loading data model definitions 41
 performance tips 80
 rerunning RUNSTATS 39
 updating statistics 39
 DB2 z/OS
 loading data model definitions 40
 performance tips 80
 updating statistics 38
 DBTSFIX output scripts
 editing 31
 running 37
 DBTSFIX script, running 30
 DDDAUDIT script

final, running 69
 running initial 6
 DDLDB2 script
 editing 33
 running 40
 DDLDBX script
 editing 33
 running 41
 DDLIFX script
 editing 34
 running 41
 DDLMSS script, running 41
 DDLORA script
 editing 34
 running 41
 DDLSYB script, running 42
 deleting
 application messaging objects 62
 node transactions 62
 deleting common components Pagelet
 Wizard data 16
 Demo database
 upgrading 1
 development, freezing 2
 documentation, finalizing in Change
 Assistant 27
 downloading fixes 2
 dropping PeopleTools tables 14

E

editing
 DBTSFIX output scripts 31
 DDLDB2 script 33
 DDLDBX script 33
 DDLIFX script 34
 DDLORA script 34
 GRANT script 32
 Integration Broker script 34
 MSGTLSUPG script 34
 multilingual step properties 35
 PPLTLS84CURTABLES script 50
 PSLANGUAGES script 32
 PTxxxTLS scripts 32
 tablespace alter script 52
 TLSUPGNONCOMP script 32
 encrypting connector passwords 58
 exporting
 node transactions 61
 PATCH84X project 47
 PATCH84XML project 48

- PPLTLS84CUR project 44
- PPLTLS84CURDEL project 47
- PPLTLS84CURML project 45
- PPLTLSML project 46
- projects 44
- PT84TBLSPC project 51

F

- file servers
 - backing up PeopleTools directories 21
 - editing PTxxxTLS scripts 32
 - installing PeopleTools software 21
- final audit reports, running 69
- finalizing documentation 27
- fixes, downloading 2
- FNLALTAUD project, creating 70
- freezing development 2

G

- generating
 - PPLTLS84CURTABLES script 50
- global support, contacting 80
- GRANT script
 - editing 32
 - running 38
- granting
 - privileges to connect ID 38

I

- images, shrinking 15
- Informix
 - loading data model definitions 41
 - updating statistics 39
- initial audits
 - reviewing 11
 - running 6
- installing
 - Change Assistant 24
 - new release 19
 - PeopleTools patch 21
 - PeopleTools software 21
- Integration Broker
 - converting 60
 - defaults, updating 60
 - deletes, preparing 62
 - objects, creating 61
- Integration Broker script, editing 34

- interface, *See* user interface

L

- languages
 - loading data 54
 - populating 54
 - updating data 65
- loading
 - base data 53
 - conversion data 58
 - data model definitions 40
 - English messages 55
 - English string data 55
 - language data 54
 - message data 42
 - noncomparable objects 54
 - PeopleTools data 54
 - PeopleTools definition security
 - group 55
 - stored statements data 55
 - system messages 42

M

- message data
 - loading 42
 - loading English messages 55
- message data, cleaning up 36
- message queues, purging 16
- migrating records 51
- model definitions, *See* data model definitions
- MSGTLSUPG script, editing 34
- MultiChannel Framework (MCF) data 57
- multilingual step properties, editing 35

N

- new release, installing 19
- node transactions
 - deleting 62
 - exporting 61

O

- object version numbers, updating 63
- Oracle
 - loading data model definitions 41
 - performance tips 80
 - updating statistics 39

organizing upgrade 1

P

Pagelet Wizard, deleting common components data 16
 passwords, encrypting connector passwords 58
 patch information, updating 38
 PATCH84X project 47
 PATCH84XML project 48
 PeopleSoft Pure Internet Architecture 23
 PeopleTools
 conversion, completing 59
 data, loading 54
 definition security group, loading 55
 directories, backing up 21
 functionality 68
 objects, converting 56
 objects, reviewing 42
 patch, applying 21
 release, reviewing 1
 script 50
 software, installing 21
 tables, dropping 14
 updating patch information 38
 updating system tables 36
 upgrade, backing up after 63
 performance
 improving your database platform 79
 planning the upgrade 79
 tips and techniques 79
 Portal
 converting objects 57
 running security synchronization 67
 PPLTLS84CUR project 44
 PPLTLS84CURDEL project 47
 PPLTLS84CURML project 45
 PPLTLS84CURTABLES script
 editing 50
 generating 50
 running 51
 PPLTLSML project 46
 preparing
 for the upgrade 13
 Integration Broker deletes 62
 process schedulers
 booting 66
 shutting down 20
 production database
 identifying empty tables 12

projects

 exporting and copying 44
 PATCH84X 47
 PATCH84XML 48
 PPLTLS84CUR 44
 PPLTLS84CURDEL 47
 PPLTLS84CURML 45
 PPLTLSML 46
 PT84TBLSPC 51
 properties table 3
 PSLANGUAGES script
 editing 32
 running 54
 PT84TBLSPC project 51
 PTUPGCONVERT program 59
 PTxxxTLS scripts
 editing 32
 running 53

Q

query prompt headings, converting 58

R

records
 migrating 51
 regenerating synchronization IDs 63
 release, new 19
 REN servers, updating configuration 56
 reporting conversion details 59
 reviewing
 Alter Audit, final 70
 change control 71
 initial audits 11
 PeopleTools functionality 68
 PeopleTools objects 42
 PeopleTools release 1
 upgrade step properties 3
 running
 AE_SYNCIDGEN program 63
 Alter Audit, final 70
 Alter Audit, initial 7
 audits 69
 data conversion, for PeopleTools changes 59
 DBTSFIX output scripts 37
 DBTSFIX script 30
 DDDAUDIT script, final 69
 DDDAUDIT script, initial 6
 DDLDB2 script 40

- DDLDBX script 41
- DDLIFX script 41
- DDLMS script 41
- DDLORA script 41
- DDLSYB script 42
- GRANT script 38
- initial audits 6
- Portal security synchronization 67
- PPLTLS84CURTABLES script 51
- PSLANGUAGES script 54
- PTUPGCONVERT program 59
- PTxxxTLS scripts 53
- row count report 12
- SYSAUDIT script, final 69
- SYSAUDIT script, initial 6
- tablespace alter script 53
- TLSUPGNONCOMP script 54
- TSRECPOP script 65
- UPGCOUNT script 12
- RUNSTATS.DAT, creating 39

S

- saving
 - application messaging objects 61
- saving customized configuration files 20
- scripts
 - DBTSFIX, editing 31
 - DBTSFIX, running 30
 - DDDAUDIT 6
 - DDLDB2, editing 33
 - DDLDB2, running 40
 - DDLDBX, editing 33
 - DDLDBX, running 41
 - DDLIFX, editing 34
 - DDLIFX, running 41
 - DDLMS, running 41
 - DDLORA, editing 34
 - DDLORA, running 41
 - DDLSYB, running 42
 - GRANT 38
 - GRANT, editing 32
 - Integration Broker 34
 - MSGTLSUPG 34
 - PeopleTools 50
 - PPLTLS84CURTABLES 50
 - PSLANGUAGES 54
 - PSLANGUAGES, editing 32
 - PTxxxTLS scripts 53
 - PTxxxTLS scripts, editing 32
 - SYSAUDIT 6

- TLSUPGNONCOMP 54
- TLSUPGNONCOMP, editing 32
- TSRECPOP 65
- UPGCOUNT 12
- security
 - loading PeopleTools definition security
 - group 55
 - running Portal security
 - synchronization 67
 - setting up 66
 - synchronizing content reference
 - permissions 66
- servers
 - application servers 22, 56, 66
 - batch servers 22
 - booting 66
 - database servers 63
 - file servers 21, 32
 - process schedulers 66
 - REN servers 56
 - shutting down 20
 - web servers 22, 66
- setting
 - Change Assistant profile 25
- setting up
 - application servers 22
 - batch servers 22
 - Change Assistant 24
 - PeopleSoft Pure Internet
 - Architecture 23
 - security 66
 - web servers 22
- shrinking images 15
- shutting down servers 20
- SQL Server
 - loading data model definitions 41
- starting servers 66
- statistics
 - DB2 UNIX/NT, updating 39
 - DB2 z/OS, updating 38
 - Informix, updating 39
 - Oracle, updating 39
 - updating 5
- stopping servers 20
- stored statements data, loading 55
- string data, loading 55
- support, contacting 80
- Sybase
 - loading data model definitions 42
- synchronization IDs, regenerating 63

- synchronizing content reference
 - permissions 66
- SYSAUDIT script
 - running final 69
 - running initial 6
- system
 - messages, loading 42
- system catalog views, updating 37

T

- tables
 - moving to new tablespaces 53
 - PeopleTools system tables, updating 36
 - PeopleTools, dropping 14
 - running row count report 12
- tablespaces
 - alter script 53
 - alter script, building 52
 - alter script, editing 52
 - migrating records to 51
 - populating data 48
 - updating names 49
- TLSUPGNONCOMP script
 - editing 32
 - running 54
- triggers, creating 62
- TSRECPOP script 65
- turning off change control 40

U

- updating
 - Integration Broker defaults 60
 - language data 65
 - PeopleSoft object version numbers 63
 - PeopleTools patch information 38
 - PeopleTools system tables 36
 - REN server configuration 56
 - statistics for DB2 UNIX/NT 39
 - statistics for DB2 z/OS 38
 - statistics for Informix 39
 - statistics for Oracle 39
 - statistics, initial 5
 - system catalog views 37
 - tablespace names 49
- updating statistics
 - DB2 UNIX/NT 39
 - DB2 z/OS 38
 - Informix 39
 - Oracle 39

- UPGCOUNT script, running 12
- upgrade
 - installing new release 19
 - organizing 1
 - PeopleTools, backing up after 63
 - planning for performance 79
 - preparing for 13
 - reviewing step properties 3
 - upgrading Demo database 1
 - user, verifying 13
- user interface
 - changing for desktop computers 75
 - changing for mobile devices 77

V

- verifying
 - database integrity 14
 - upgrade user 13
- version numbers, updating 63
- views, creating 60

W

- web servers
 - backing up PeopleTools directories 21
 - booting 66
 - installing PeopleTools software 21
 - setting up 22
 - shutting down 20