

PeopleSoft Enterprise Staffing Front Office 8.4/8.8 to Financials/Supply Chain Management 9.0 Upgrade

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PeopleSoft Enterprise Staffing Front Office 8.4/8.8 to Financials/Supply Chain Management 9.0
Upgrade
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About This Documentation

Understanding This Documentation

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 Oracle's PeopleSoft Enterprise products and documentation, including PeopleSoft-specific documentation conventions.

Audience

This documentation assumes you have a basic understanding of the PeopleSoft system. One of the most important components to a successful upgrade of your PeopleSoft installation is your onsite experience. PeopleSoft recommends that, prior to performing this upgrade, you have completed at least one PeopleSoft introductory training course.

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. Familiarity with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages is necessary. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

See Oracle/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:

- Install the Software
- Prepare Your Database
- Apply Application Changes

This documentation may also contain appendices. The appendices contain information you may need for your upgrade. When a task requires you to review additional information, you will be directed to the appropriate appendix.

Related Information

You can review related information that may help with your PeopleSoft upgrade. You can find the following information on Oracle/PeopleSoft Customer Connection. We post updates and other items on Customer Connection as well.

- 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 RDMBS software or batch files.

See Oracle/PeopleSoft Customer Connection (Site Index, R, release notes, Release, Notes)

- Upgrades Database

The Upgrade Documentation database in the Library category of Customer Connection will have other information attained after shipment of this release that may not be included in these instructions. This information may include Updates & Fixes required at upgrade. Always check the Upgrade Documentation database for the most current documentation and information.

See Oracle/PeopleSoft Customer Connection (Site Index, U, upgrade guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts)

Important! Before upgrading, it is imperative that you check the Upgrade Documentation database on Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

See Also

Oracle/PeopleSoft Customer Connection www.peoplesoft.com

CHAPTER 1

Install the Software

This chapter discusses:

- Understanding Software Installation
- Installing the New Release
- Applying PeopleTools Patches
- Installing Change Assistant
- Applying Updates Required for Upgrade
- Creating and Configuring an Upgrade Job
- Reviewing Upgrade Step Properties

Understanding Software Installation

This chapter discusses how you install all of the software that is required for your upgrade. It is very important that you complete all of the instructions discussed in this chapter before you attempt the upgrade.

Task 1-1: Installing the New Release

To upgrade your system, you must first install the Oracle's PeopleSoft Enterprise Financial Management Solutions (FMS) 9.0 codeline and System database. Then, download the PeopleSoft Enterprise PeopleTools installation guide for your platform. Next, download the application-specific addenda for the product lines you are installing.

Note. The Oracle's PeopleSoft Enterprise Financials/Supply Chain Management (FSCM) family of applications is sometimes referred to in this documentation as Financials. Also, Oracle's PeopleSoft Enterprise Staffing Front Office is sometimes referred to as Front Office, and Oracle's PeopleSoft Enterprise Pay/Bill Management is sometimes referred to as Pay/Bill or PayBill.

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

Install your new PeopleSoft software and System Database following the instructions in the PeopleSoft Enterprise PeopleTools installation guide for your platform along with the application installation guide for your product line.

See Enterprise PeopleTools Installation for your database platform, (Customer Connection, Site Index, installation guides and notes, Enterprise).

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-2: Applying PeopleTools Patches

Now is a good time to download and apply PeopleSoft PeopleTools fixes that are Required for Upgrade from Updates and Fixes on Customer Connection. These downloads will update your system with any changes made to PeopleSoft PeopleTools that affect the upgrade process.

Apply all required-for-upgrade PeopleSoft PeopleTools patches from Customer Connection. Select Patches + Fixes, Updates and Fixes, Required for Installation or Upgrade. Select PeopleTools as the Product Line, PeopleTools as the Product, and the PeopleTools release that applies to you. Select the Required for Upgrade option.

Follow the instructions in the patch documentation to apply the PeopleSoft PeopleTools changes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 1-3: Installing Change Assistant

After you install PeopleSoft PeopleTools, you must install PeopleSoft Change Assistant for your new release in order to run your upgrade and to apply application patches and fixes that are Required for Upgrade. Follow the installation instructions in the *Enterprise PeopleTools PeopleBooks, PeopleSoft Software Updates*. This PeopleBook describes how to set up Change Assistant and the Environment Management Framework, how to navigate through Change Assistant, how to use Change Assistant for updates, how to use update templates, how to set up upgrade templates, and how to run the upgrade process.

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

For this upgrade, you will need to use Change Assistant to run your upgrade and to apply fixes to your new release Demo database and new release System database. Once Change Assistant is installed, open it by selecting Start, Programs, PeopleSoft 8.4, Change Assistant.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-4: Applying Updates Required for Upgrade

This section discusses:

- Understanding Applying Updates Required for Upgrade
- Applying Baseline From the Upgrade Page
- Applying Required for Upgrade Updates

Understanding Applying Updates Required for Upgrade

Now is a good time to download and apply all files and objects from the Upgrade page on Customer Connection and to download all Required for Upgrade fixes from Updates and Fixes on Customer Connection. These downloads will update your system with any changes made to the upgrade process or conversion code.

Task 1-4-1: Applying Baseline From the Upgrade Page

The files attached to the Upgrade page on Customer Connection are considered baseline. You must apply these before you apply any other fixes from Customer Connection.

To access the Upgrade page in Customer Connection, navigate to Customer Connection, Implement Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Upgrade Documentation and Scripts, Release, and select the PeopleSoft release you are upgrading to. Find the specific upgrade path that you are performing. On the Upgrade page, find the Upgrade Scripts and Templates section, and then follow the instructions to apply the baseline code.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-4-2: Applying Required for Upgrade Updates

To access Change Packages on Customer Connection, navigate to Patches + Fixes, Updates + Fixes, Required for Install or Upgrade. Select the product line and release that you are upgrading to, as well as the Required for Upgrade option.

You should apply all fixes listed under the product line/release, even if you have not licensed the product that the fix is listed under. Many interdependencies exist between products and database objects. If you do not apply the fix, you may introduce an error in a different area of the conversion code.

Some of the fixes will list a specific upgrade path. You should apply these fixes even if they are targeted for a different upgrade path. Many interdependencies exist between upgrade programs for various paths. If you don't apply all fixes, you may introduce errors.

To apply Required for Upgrade patches:

1. Download Required for Upgrade Change Packages using the Download Change Package functionality in Change Assistant.
2. Use Change Assistant to install, apply, or both, the updates into your System database.

Review the documentation included with each update before you apply the update. Manual steps may be required to successfully apply the update.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-5: Creating and Configuring an Upgrade Job

To run an upgrade using Change Assistant, you need to configure Change Assistant as well as an upgrade job. To do so, launch Change Assistant and perform these steps:

1. Configure the Change Assistant Options.
 - a. Select Tools, Options.
 - b. On the Change Assistant tab, select the Perform Application Upgrade mode.
 - c. Select the Enable Server Processing check box if you will be using Change Assistant to run a process on a separate host server.
 - d. Complete the remainder of the information on this tab and all other active tabs.
 - e. Click OK when you are finished.

See Enterprise PeopleTools PeopleBook, PeopleSoft Software Updates, Configuring Change Assistant for Upgrade, Specifying Change Assistant Options for your current PeopleTools release.

See Customer Connection, Site Index, Updates for Documentation, Enterprise, PeopleTools, Change Assistant, Using Change Assistant for Application Upgrades.

2. Import the upgrade template contained within the UpgradeTemplates.exe file that you downloaded from the Upgrade homepage on Customer Connection.
 - a. Select File, Import Template.
 - b. Select the template for your product and path.
 - c. Click Import.
3. Set the Documentation Directory.

Change Assistant can display the HTML upgrade documentation in the documentation pane.

- a. Select Edit, Set Documentation Directory.

- b. Enter or browse to the documentation containing the HTML documentation and click OK.
See Enterprise PeopleTools PeopleBook, PeopleSoft Software Updates, Configuring Change Assistant for Upgrades, Setting the Documentation Directory.
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. Fill in all required information on each screen.
See Customer Connection, Site Index, Updates for Documentation, 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, Specifying Change Assistant Options.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 1-6: Reviewing Upgrade Step Properties

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

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

Example of a Properties table

The Database Orientation has two possible descriptions: Source and Target.

Note. This upgrade differs from many other PeopleSoft upgrades. Please pay special attention to the descriptions for each database.

- Source indicates that the step runs on the Source database. During your initial pass and for test move to production passes, the Source database is a Copy of your old release Front Office Production database.

- Target indicates that the step runs on the Target database, which is your new FSCM 9.0 system database.

The Initial or MTP properties have three possible descriptions: Initial Upgrade, Move To Production, and Both.

- Initial Upgrade indicates that this step runs only in the Initial pass of the upgrade.
- Move To Production indicates that this step runs only in Move to Production upgrade passes. This step is not applicable to the Initial pass.
- Both indicates that this step runs in both the Initial and Move to Production upgrade passes.

The Products property has two descriptions: All, and a specific product name or names:

- All indicates that you run the step regardless of which products you are upgrading.
- A specific product name or names indicates that you run the step only if you're upgrading the product or products specified. You specified the product or products that you would upgrade when you set up your Change Assistant job configuration.

The Platforms property has two possible descriptions: All, and a specific platform name or names.

- All indicates that you run the step regardless of which platform your database uses.
- A specific platform name or names indicates that you run the step only if your database uses the specified platform or platforms. You specified the platform that you would use 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. DB2 UDB for OS/390 and z/OS is the official IBM name for the database management system. The current PeopleSoft PeopleTools release no longer supports the OS/390 operating system; it supports only z/OS, the replacement for OS/390. For the sake of brevity, this documentation sometimes refers to DB2 UDB for OS/390 and z/OS as DB2 z/OS, and it sometimes refers to DB2 UDB for Linux, Unix, and Windows as DB2 UNIX/NT.

The Languages property has two possible descriptions: All, and a specific language name or names.

- All indicates that you will run this step regardless of which language your database uses.
- A specific language name or names indicates that you will run this step only if your database uses the language or languages specified. You specified the languages installed on your database when you set up your Change Assistant job configuration.

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

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

This PeopleBook resides on the PeopleTools Documentation CD that was shipped with your product.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

CHAPTER 2

Prepare Your Database

This chapter discusses:

- Understanding Database Preparation
- Understanding Your Upgrade
- Copying Your Production Database
- Applying Upgrade Planning Files
- Setting Up Front Office
- Exporting Front Office Data
- Performing General Options Setup

Understanding Database Preparation

You must make a copy of your production database before you start preparations for the technical portion of the upgrade. Unless otherwise noted, run these tasks on your Copy of Production database (not the New Release Demo database). These tasks do not use the new PeopleSoft release. You should use your current codeline and current Oracle's PeopleSoft PeopleTools release to perform these tasks unless instructed otherwise.

Important! You must read the documentation *Getting Started on Your PeopleSoft Upgrade* before you continue with your upgrade. This getting started guide explains the upgrade process, terminology, and setup tasks that *must* be performed prior to starting your upgrade.

Task 2-1: Understanding Your Upgrade

This section discusses:

- Understanding PeopleSoft Upgrades
- Verifying the Software Installation
- Defining Upgrade Databases
- Reviewing Upgrade Notes and Tips

Understanding PeopleSoft Upgrades

This task reviews information you need to know before you begin your upgrade. It explains the different types of databases you will use and provides useful upgrade tips and information you may need to apply before beginning your upgrade.

Task 2-1-1: Verifying the Software Installation

Before continuing with the upgrade, you must complete all of the tasks in the chapter “Install the Software.” Verify that the following tasks are complete:

- Installing the new release.
- Applying PeopleTools patches.
- Installing the Change Assistant.
- Applying updates required for upgrade.
- Creating and configuring an upgrade job.
- Reviewing upgrade step properties.

Properties

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

Task 2-1-2: Defining Upgrade Databases

The following databases will be used during your upgrade:

- The Source database refers to your old release Staffing Front Office Copy of Production. Data will be exported out of this environment and later imported into the new release database.
- The Target database refers to the Financials/Supply Chain Management 9.0 System database. Data will be imported into this environment from the Copy of Production database and converted.

Note. You will create more than one Copy of Production database. Your second and subsequent copies are referred to as the New Copy of Production.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 2-1-3: Reviewing Upgrade Notes and Tips

This section contains information that may apply to your upgrade product. Review the information in this section before beginning your upgrade.

- Microsoft SQL Server 2000 Column Statistics

Microsoft SQL Server 2000 introduced a feature to create user-defined statistics on columns within a table. This feature is not supported by PeopleTools. If you added user-defined statistics to any columns in your PeopleSoft application, it may cause errors to occur during the upgrade steps that alter tables. PeopleSoft recommends that you drop all user-defined statistics on columns of PeopleSoft tables before proceeding with your upgrade.

- Review Upgrading Staffing Front Office and Pay/Bill Management appendix.

This appendix explains the upgrade process for the Staffing Front Office 8.4/8.8 to Financials/Supply Chain Management 9.0 database.

See Appendix: “Upgrading Front Office and PayBill.”

Properties

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

Task 2-2: Copying Your Production Database

This section discusses:

- Making a Copy of Your Production Database

Task 2-2-1: Making a Copy of Your Production Database

Make a copy of your production database. You export data from this database, rather than performing the upgrade directly on your production database. Performing an upgrade on a copy of your production database enables you to test your upgrade in a controlled environment. Refer to the administration guide for your database platform for information on copying databases.

Note. Move to Production: This is a second Copy of Production sometimes referred to as the New Copy of Production. For both the Initial Pass and Move to Production passes the Copy of Production will be used as the Source database and the FSCM 9.0 System database will be used as the Target database. For each upgrade pass you will need to create a new Copy of Production and FSCM 9.0 System database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-3: Applying Upgrade Planning Files

This section discusses:

- Understanding Applying Upgrade Planning Files
- Applying the UPGOPTFO Project
- Building the UPGOPTFO Project
- Setting Up Security for Upgrade Planning

Understanding Applying Upgrade Planning Files

In this task, you apply the upgrade planning files that you downloaded from the Upgrade database on Customer Connection to your current codeline. These files may include Structured Query Report (SQR) programs and scripts that you will execute in later tasks, and a project that you will apply to your Copy of Production database. This project may include records, fields, pages, menus, queries, and process definitions that allow functional users to define conversion information needed for later upgrade tasks.

Task 2-3-1: Applying the UPGOPTFO Project

In this step, apply the Staffing Front Office (FO) UPGOPTFO project to your Copy of Production database using the Copy Project from File process.

Apply the UPGOPTFO to your Staffing Front Office database by following the instructions below.

To apply the UPGOPTFO project:

1. Using your current codeline, launch Application Designer and sign on to your Copy of Production database.
2. Select Tools, Copy Project, From File.
3. From the dialog box, select the import directory PS_HOME\PROJECTS\ (current codeline).
4. Click UPGOPTFO in the Projects box, and then click Select.
5. Click Copy.

This copies the UPGOPTFO project onto your Copy of Production database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-3-2: Building the UPGOPTFO Project

In this step, you create and alter tables, and create views.

To build the UPGOPTFO project:

1. Using your current codeline, launch Application Designer and sign on to your Copy of Production database.
2. Select File, Open...
3. In the Definition drop-down list box, select Project and click Open to display the list of projects.
4. Select UPGOPTFO and click Open again.
5. Select Build, Project...
6. Under Build Options, select Create Tables, Create Views.

7. Click Settings...
8. On the Create tab, select Recreate View if it already exists and Recreate Table if it already exists.
9. On the Logging tab, select Fatal errors, warnings, and informational messages.
10. On the Scripts tab, select Output to separate files.
11. In the Script File Names box, give your scripts a unique name that reflects this task number and the object being created.
12. Click OK.
13. Under Build Execute Options, select Build script file.
14. Click Build.
15. Using the appropriate SQL query tool for your platform, run the scripts created in the step above.
Run the scripts in the following order: Create Tables, Create Views, Create Indexes.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-3-3: Setting Up Security for Upgrade Planning

In this step you set up security on your Copy of Production database.

To set up security:

1. Select PeopleTools, Security, Permissions and Roles, Permission Lists.
2. Enter the permission list for the users who will be reviewing and setting up functional requirements for the upgrade then click Search.
3. Select the permission list for the users that will be reviewing and setting up functional requirements for the upgrade.
4. Grant access to this permission list for the following navigations:
PeopleTools, Utilities, Administration, Translate Values.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4: Setting Up Front Office

This section discusses:

- Understanding the Front Office Setup

- Verifying Installation Options
- Configuring PC Business Unit
- Mapping Skill Type to Competency Type
- Mapping Skill Code to Competency
- Mapping Resource and Order Priority Values
- Mapping Business Unit to Location Code
- Mapping Test to Accomplishment
- Mapping Degree to Accomplishment
- Mapping Major Code
- Mapping School Code
- Printing Translate Values for NAME PREFIX
- Printing Translate Values for SCHOOL TYPE

Understanding the Front Office Setup

In this task you will set up your data on your Staffing Front Office database to prepare it for conversion.

Task 2-4-1: Verifying Installation Options

In this step, verify that you selected the correct products when you installed your FSCM 9.0 database.

Note. Run this step against your FSCM database.

To verify installation options:

1. Select Set Up Financials/Supply Chain, Install, Installation Options.
2. Verify that the Pay/Bill Management check box is *not* selected.
3. Verify that the Staffing Front Office check box is selected.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 2-4-2: Configuring PC Business Unit

As part of the upgrade to FSCM 9.0, all Staffing Front Office 8.4/8.8 Business Units are mapped with Location Codes and Project Costing (PC) Business Units to upgrade the Business Units to Staffing Branches.

PC Business Units did not exist in Staffing Front Office 8.4/8.8. Therefore, before you map your Staffing Front Office 8.4/8.8 Business Units, you must create those corresponding PC Business Units in FSCM 9.0.

Be sure to keep a record of the PC Business Unit values you enter for FSCM 9.0. You will enter those values to the Staffing Front Office 8.4/8.8 Business Units later in the upgrade.

To enter the PC Business Unit values:

1. Select Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Definition.
2. Create one or more PC Business Units in FSCM 9.0 based on how you want to map your Staffing Front Office 8.4/8.8 Business Units later in the upgrade.

See PeopleSoft Enterprise 9.0 PeopleBook, PeopleSoft Staffing Front Office for your current release.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 2-4-3: Mapping Skill Type to Competency Type

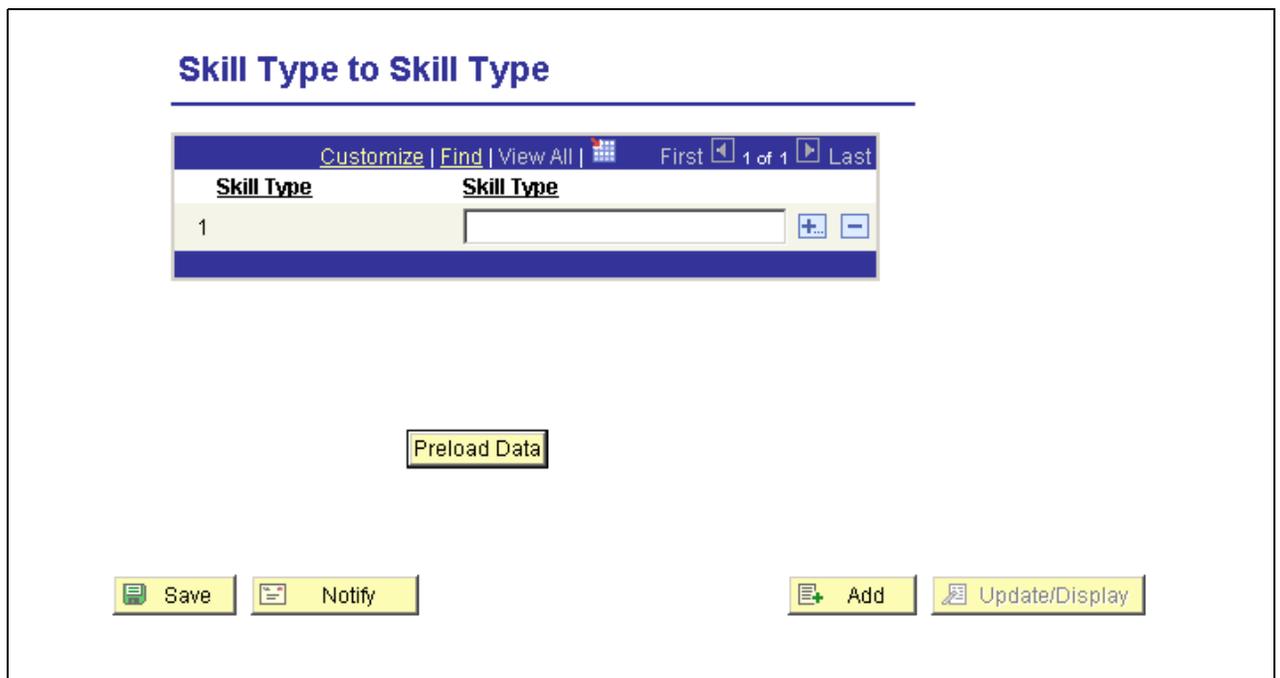
The Front Office Skills tables used in Staffing Front Office 8.4/8.8 are replaced by the Competency Management and Resource Management Competency tables in FSCM 9.0. As part of the upgrade process, you have to manually translate your existing skill types from Staffing Front Office 8.4/8.8 to the skill types associated with FSCM 9.0 competencies.

The source skill type table in Staffing Front Office 8.4/8.8 has Skill Type (character length 6) as its key. The table, Competency Management, in FSCM 9.0, has a single element key made up of Skill Type (character length 6).

You can choose to keep the same values from your Staffing Front Office release or change the values during the manual mapping process.

To map Skill Type to Competency Type:

1. Select Set Up Staffing, Upgrade, Skill Type to Skill Type.



Skill Type to Skill Type page

- Click the Preload Data button.

Once the Preload Data button is selected, the page will auto-populate with values. The Skill Type column on the left will populate with your Skill Type values from Staffing Front Office 8.4/8.8. The right Skill Type column will populate with the same values as the left column, depicting what that Skill Type value will map to. This avoids manual entry of the values if you find that all values are unique.

Note. The Preload Data button only appears once, during the first time the page loads. Once the component is saved the button will no longer be available.

Skill Type to Skill Type

Skill Type	Skill Type	
1 ACCTG	ACCTG	+... -
2 ADMIN	ADMIN	+... -
3 COMPUT	COMPUT	+... -
4 EQUIP	EQUIP	+... -
5 FINANC	FINANC	+... -
6 FOOD	FOOD	+... -
7 GOVT	GOVT	+... -
8 HEALTH	HEALTH	+... -
9 HR	HR	+... -
10 INSUR	INSUR	+... -

Preload Data

Save

Notify

Add

Update/Display

Skill Type to Skill Type page; Preloaded Data

- Verify that the right hand column of Skill Type values (representing the values in FSCM 9.0) are unique. If you find a value that is a duplicate of a previous value, change the value to make it unique.
- Once you have verified that the values are unique, click the Save button. The page will not save if the target values are not unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-4: Mapping Skill Code to Competency

The Skills tables used in PeopleSoft Staffing Front Office 8.4/8.8 have been replaced by Competency Management and Resource Management Competency Tables in PeopleSoft FSCM 9.0. As part of the upgrade, you must manually translate your skill codes from Staffing Front Office 8.4/8.8 to competencies in FSCM 9.0.

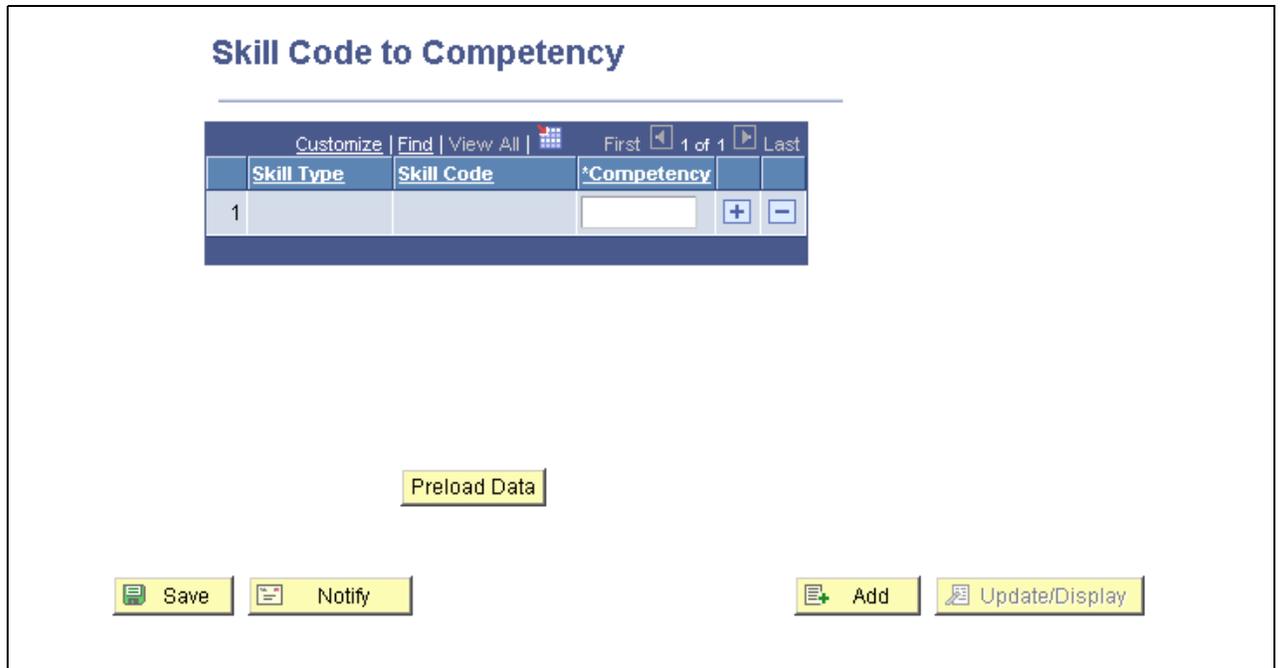
The Skill Code table in PeopleSoft Staffing Front Office 8.4/8.8 has a two-element key, made up of Skill Type (character length 6) and Skill Code (character length 10). The Competency table in PeopleSoft FSCM 9.0 has a single element key made up of Competency (character length 8).

Competency cannot be generated directly from Skill Code, as the same Skill Code value may appear under various Skill Types in Staffing Front Office 8.4/8.8. Even if the values of Skill Code are distinct in Staffing Front Office 8.4/8.8, the first eight characters of the Skill Code will not ensure uniqueness.

Despite the scenario mentioned above, Competency values will be auto-generated to avoid duplicates and manual entry. If you choose to change the auto-generated values, you must ensure that all values are unique before you save the page.

To map Skill Code and Skill Type to Competency:

1. Select Set Up Staffing, Upgrade, Skill Code to Competency.



Skill Code to Competency page

2. Click the Preload Data button.

The Skill Type and Skill Code columns will populate with values from your Staffing Front Office 8.4/8.8 Skill Type-Skill Code combination. The Competency column will populate with the auto-generated values, representing FSCM 9.0 values.

Note. The Preload Data button only appears once, the first time the page loads. Once the page is saved the button is no longer available.

Skill Code to Competency

	Skill Type	Skill Code	*Competency		
1	ACCTG	A0309	ACCTA030	+	-
2	ACCTG	A05	ACCTA05	+	-
3	ACCTG	A050	ACCTA050	+	-
4	ADMIN	A0001	ADMIN001	+	-
5	ADMIN	A0002	ADMIN002	+	-
6	ADMIN	A0003	ADMIN003	+	-
7	ADMIN	A0004	ADMIN004	+	-
8	ACCTG	A050	TRAIDEV	+	-
9	ACCTG	A050	WELD3	+	-

Save
Notify

Add
Update/Display

Skill Code to Competency page, Competency values populated

3. If you change any values, ensure they are unique before you save the page.
4. Click the Save button when finished.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-5: Mapping Resource and Order Priority Values

The PeopleSoft Front Office Priority tables used in Staffing Front Office 8.4/8.8 were used for three types of priorities:

- Applicants/Employees
- Orders

- Customers

The priority table in PeopleSoft Staffing Front Office 8.4/8.8 has a two-element key made up of User Status (character length 5) and Status Type (character length 4). The Priority table in PeopleSoft FSCM 9.0 has a single element key made up of Priority Code (character length 3).

For each of the Status Types, the first three characters of the User Status values will be extracted to generate new Priority code values. In some cases, the generated Priority code values will not be unique if the first three characters of two or more User Status fields are the same. In such cases, you must manually resolve the values of the priority codes.

The upgrade process will do the following:

- User Status “Customer” will not be upgraded as it was not used in any component of Staffing Front Office 8.4/8.8.
- User Status “Employees” will be upgraded to Resource Priority table in FSCM 9.0.
- User Status “Orders” will be upgraded to the Order Priority table in FSCM 9.0.

The following procedure will instruct you to map the Status Type, User Status to its corresponding Priority codes.

To map the Status Type, User Status to Priority codes:

1. Select Set Up Staffing, Upgrade, User Status to Priority Code.

The screenshot shows a web interface titled "User Status to Priority Code". At the top, there are navigation options: "Customize", "Find", "View All", and "1 of 1" with "First" and "Last" buttons. Below this is a table with three columns: "Status Type", "User Status", and "Priority Code". The first row of the table contains the number "1" in the "Status Type" column. To the right of the table are "+" and "-" buttons. Below the table is a yellow "Preload Data" button. At the bottom of the page, there are four buttons: "Save", "Notify", "Add", and "Update/Display".

User Status to Priority Code page

2. Click on the Preload Data button.

This button populates the page with the existing Status Type and User Status and the corresponding Priority Code. The Priority Code is generated by extracting the first three characters of the User Status field.

Note. The Preload Data button only appears once, the first time the page loads. Once the page is saved the button is no longer available.

3. Review the Priority Codes to ensure each value is unique.

All Priority Codes should be created as unique values. If a Priority Code is not unique, manually change it to make it so. The page will not save if the codes are not unique.

- Once you have reviewed all Priority Codes, click the Save button.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

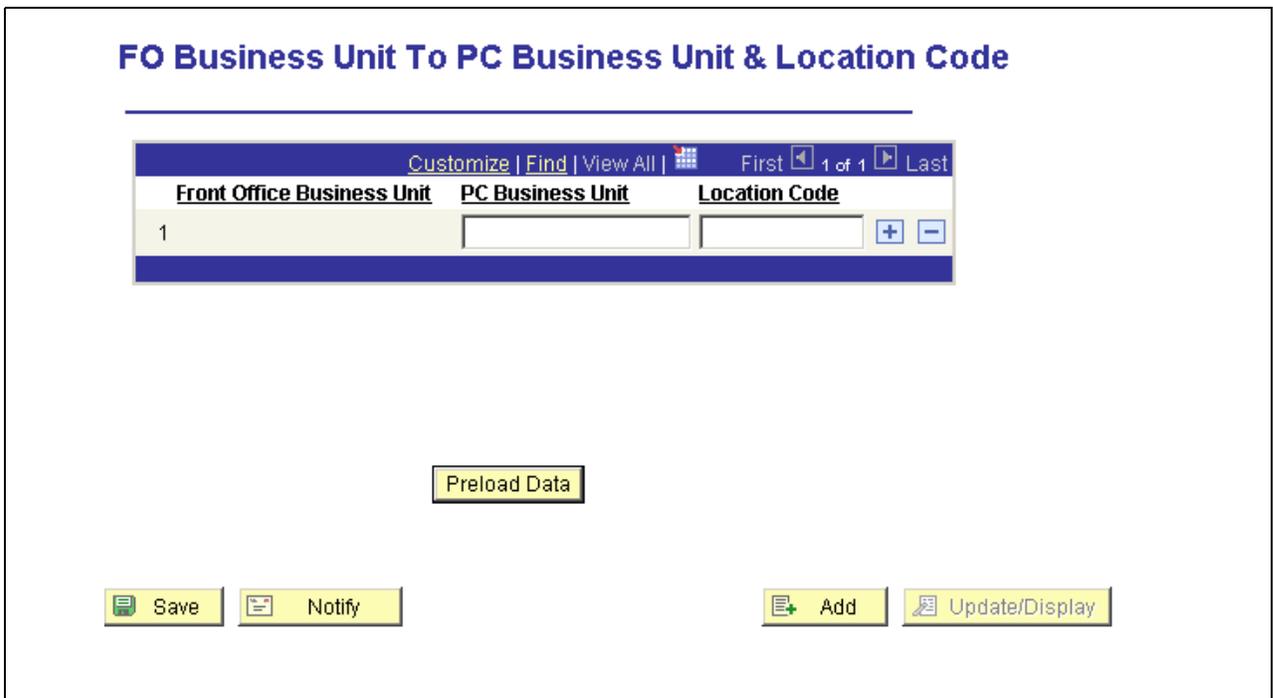
Task 2-4-6: Mapping Business Unit to Location Code

Front Office Business Units have been replaced by Staffing Branches in FSCM 9.0. Sometimes, in Staffing Front Office 8.4/8.8 Business Units were referred to as Staffing Branches. However, they were still Business Units by definition. In FSCM 9.0, Front Office Business Units are treated and referred to only as Staffing Branches.

In FSCM 9.0 each Staffing Branch needs a corresponding PC Business Unit and Location Code. Therefore, you must map a PC Business Unit and a Location Code for each Front Office Business Unit in 8.4/8.8 before the Front Office Business Units are upgraded to Staffing Branches.

To map Front Office Business Units to PC Business Unit and Location Code:

- Select Set Up Staffing, Payroll, Locations.
Make note of these Location Codes; you will need them later in your upgrade.
- Select Set Up Staffing, Upgrade, FO Business Unit to Branch.



FO Business Unit to PC Business Unit & Location Code page

- Click on the Preload Data button.

Note. The Preload Data button only appears once, the first time the page loads. Once the page is saved the button is no longer available.

FO Business Unit To PC Business Unit & Location Code

Front Office Business Unit	PC Business Unit	Location Code		
1 CA100	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2 EAST	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3 GA100	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
4 GA110	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
5 GBIBU	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
6 MDWST	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
7 NWEST	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
8 SF001	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
9 SOCNT	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
10 SWEST	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

FO Business Unit to PC Business Unit & Location Code page, data loaded

4. For each Front Office Business Unit, key in a PC Business Unit from the list of PC Business Unit values you previously noted in the task, Configuring PC Business Unit earlier in the upgrade.
5. For each Front Office Business Unit key in the corresponding Location Code from the list you noted at the start of this step.

All Front Office Business Units will be upgraded to Staffing Branches in FSCM 9.0, regardless of if they have a Location Code mapped. Later in the upgrade you can add or change the Location Codes.

See “Apply Application Changes,” Configuring Front Office and PayBill, Configure Location for Staffing Branches.

6. Once you have entered all PC Business Units and Location Codes, click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-7: Mapping Test to Accomplishment

Tests in Staffing Front Office 8.4/8.8 are being replaced by Accomplishments in FSCM 9.0. If you already use Competency Management tables in FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some accomplishment values are already present in the new FSCM 9.0 table. If this is your situation, you must resolve the Staffing Front Office 8.4/8.8 values and the FSCM 9.0 values so that the FSCM values do not get overwritten. You must add new accomplishment values to FSCM 9.0 from Staffing Front Office 8.4/8.8 Test values, or you must map the existing Test values from Staffing Front Office 8.4/8.8 to Accomplishment values in FSCM 9.0.

If you do not use Competency Management tables in your FSCM database, you will upgrade your Test values from Staffing Front Office 8.4/8.8 to Accomplishment values in FSCM 9.0.

To map Test values to Accomplishments:

1. Select Set Up Staffing, Upgrade, Test to Accomplishment.

The screenshot shows a web-based interface for mapping tests to accomplishments. The main heading is "Test To Accomplishment". Below it is a table with two columns: "Test" and "*Accomplishment". The table contains one row with the value "1" in the "Test" column and an empty input field in the "*Accomplishment" column. To the right of the table are plus and minus icons. Below the table is a yellow button labeled "Preload Data". At the bottom of the interface are four buttons: "Save", "Notify", "Add", and "Update/Display".

Test to Accomplishment page

2. Click on Preload Data.

This populates the Test column on the Test to Accomplishment page with your existing Test Code values from Staffing Front Office 8.4/8.8 as well as generates the new Accomplishment values in the Accomplishment column.

3. If you are already using the Accomplishments table, proceed to step 4.
Otherwise, save the page and skip the remaining steps.

Note. Ensure that all values are unique. The page will not save until all values are unique.

4. Bring up the Accomplishments of Category Test report you ran earlier in the upgrade (UPG_FOQ03).

Using the Accomplishment values from the report that represent the values you currently have in your FSCM database, verify if any of the Test values from Staffing Front Office 8.4/8.8 already exist in the report. There are three possible scenarios you may encounter:

- The Staffing Front Office 8.4/8.8 Test code value is already present in your report and both the values refer to the same context (for example 1004 is General Aptitude Test in both Staffing Front Office and FSCM).

This requires no action. You can leave the auto-generated values as they are.

- If the Test code value is present in your report and in the Accomplishment column, but the values refer to different contexts (for example, 1004 represents General Aptitude Test in Staffing Front Office but 1004 represents Programmer's Aptitude Test in FSCM), then you need to change the corresponding value in the Accomplishment column to a unique value that is not already used in FSCM (so there isn't a duplicate of the value in the Accomplishment column).
- If the Test code value is not present in your report but there is another Accomplishment in the report referring to the same context that you do have in Staffing Front Office 8.4/8.8 you must change the value in the Accomplishment column to the FSCM Accomplishment value that represents the same value.

For example, 1009 represents Business English in Staffing Front Office 8.4/8.8 but 1009 is not present on your report because 1009 does not exist or represent Business English in FSCM. However, on the report 1006 represents Business English. Therefore, you must change the value in the Accomplishment column that corresponds to 1009 (Business English in Staffing Front Office 8.4/8.8) to 1006 (Business English in FSCM). This maps the Accomplishment value for Business English, in FSCM, to the value for Business English in Staffing Front Office 8.4/8.8.

5. Save the page.

Note. The page will not save until all values are unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-8: Mapping Degree to Accomplishment

Degrees in Staffing Front Office 8.4/8.8 are replaced by Accomplishments in FSCM 9.0.

If you already use Competency Management tables in FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some accomplishment values are already present in the new FSCM 9.0 table. If this is your situation, you must resolve the Staffing Front Office 8.4/8.8 and FSCM 9.0 values so that the FSCM values do not get overwritten during the upgrade. You must add new accomplishment values to FSCM from Staffing Front Office 8.4/8.8 Degree values or you must map the existing Degree values from Staffing Front Office 8.4/8.8 to Accomplishment values in FSCM 9.0.

If you do not use Competency Management tables in FSCM, you will upgrade your Staffing Front Office 8.4/8.8 Degree values to Accomplishment values in FSCM 9.0.

To map Degree values to Accomplishment values:

1. Select Set Up Staffing, Upgrade, Degree to Accomplishment.
2. Select the Preload Data button.

This will populate the Degree column with your existing Degrees in Staffing Front Office 8.4/8.8 and pre-populate the new Accomplishment values to avoid manual entry.

Only the Degree values that appear here will be mapped to Accomplishment values in FSCM 9.0.

Note. The Preload Data button only appears the first time this page is opened.

3. If you use the Accomplishments table in FSCM, proceed to step 4.
Otherwise, save the page and skip all remaining steps.
4. Find the report, “Accomplishments of category Degree” (UPG_FOQ04) that you ran earlier in the upgrade.

Using the existing Accomplishment values found on your report as reference, verify if any of the Staffing Front Office 8.4/8.8 Degree values (as seen in the Degree column) are listed in the report. If there are duplicates between the values on this page and the report there are three scenarios and solutions for you to review:

- If the Degree value is already present in the Degree column on this page and in the report and each value represents the same context (for example, BS refers to Bachelors of Science in both Staffing Front Office and FSCM) there is no action required.
- If the Degree value is present on this page and in the report but the values refer to different contexts, then you must change the Accomplishment value on the page to correspond to the Degree so that it creates a unique value in FSCM.

For example, the Degree column lists BT, referring to Bachelor of Theology in Staffing Front Office 8.4/8.8 and the report lists BT as well but in FSCM BT refers to Bachelor of Technology. In the Accomplishment column next to BT (as seen in the Degree column) you must create a new unique value to represent Bachelor of Theology in FSCM 9.0. This value must be unique.

- If the Degree value in the Degree column is not a valid value in your report of Accomplishment values, but there is an Accomplishment Value in your report that refers to the same context as the Degree value, you must map the Degree value (in the Degree column) to the correct value in the Accomplishments column, by changing the value in the Accomplishment column.

For example, the Degree value BSL represents Bachelor of Science-Law in Staffing Front Office 8.4/8.8 and BL refers to Bachelor of Science-Law in your report (FSCM 9.0). On the page, the Degree value will read BSL, and auto-populate BSL for the Accomplishment value to map to. However, these don't represent the same value. Therefore, you must change the BSL that is populated in the Accomplishment column to BL so that the Degree value will map to the correct Accomplishment value.

5. Once you have reviewed all new Accomplishment values for FSCM, click the Save button.

The page will not save if the values are not unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-9: Mapping Major Code

As part of the upgrade, Staffing Front Office 8.4/8.8 Major Code values will be upgraded to Major Code values in FSCM 9.0.

If you already use Competency Management tables in FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some major code values that you use for Staffing Front Office 8.4/8.8 are already present in the new FSCM table. If this is the case, you must resolve the Staffing Front Office 8.4/8.8 and FSCM values so that the FSCM 9.0 values do not get overwritten. You will either add Major Code values to FSCM 9.0 from Staffing Front Office 8.4/8.8 values or map the existing Major Code values in Staffing Front Office 8.4/8.8 to Major Code values in FSCM.

If you do not use Competency Management tables in FSCM, you simply upgrade your Major Code values from Staffing Front Office 8.4/8.8 to Major Code values in FSCM 9.0.

To map Staffing Front Office Major Codes to FSCM Major Codes:

1. Select Set Up Staffing, Upgrade, Major Code to Major Code.

The screenshot shows a web-based interface for mapping major codes. The main heading is "Major Code to Major Code". Below it is a table with two columns, both labeled "Major Code". The first row contains the number "1" in the first column and a text input field in the second column. To the right of the input field are plus and minus icons. Below the table is a yellow "Preload Data" button. At the bottom of the page, there are four buttons: "Save", "Notify", "Add", and "Update/Display".

Major Code to Major Code page

2. Click the Preload Data button.

This will populate the Major Code column (left column) with your Staffing Front Office 8.4/8.8 values. The right hand Major Code column is populated with auto-generated values that map to FSCM 9.0.

Note. The Preload Data button will only appear the first time this page is loaded.

3. If you are already using the Accomplishments table, proceed to step 4.

Otherwise, save the page and skip the rest of these steps.

4. Retrieve the Major Codes (UPG_FOQ06) report you ran earlier in the upgrade.

This report gives you the existing Major Code values in FSCM. Using this report as a reference, verify if any of the Staffing Front Office 8.4/8.8 Major Code values (from the left hand column on this page) already exist in your report. If so there are three possible scenarios and solutions:

- If the Front Office 8.4/8.8 Major Code (from this page) is already present in your report and the values represent the same context (for example, K000003 refers to Electrical Engineering in both Staffing Front Office 8.4/8.8 and in FSCM 9.0) no action is required.
- If the Major Code value on this page is already present in your report, but the values represent different contexts then you must change the value of the Major Code on the right hand column of this page so that the Staffing Front Office 8.4/8.8 Major Code value maps to a new unique Major Code value in FSCM 9.0.

For example, K000010 refers to Anthropology in Staffing Front Office 8.4/8.8 and K000010 refers to Business Administration in FSCM 9.0. In this example, the page would display K000010 in the left hand Major Code column (Staffing Front Office 8.4/8.8 value) and K000010 in the right hand Major Code column. From your report you know that in FSCM K000010 represents Business Administration. Therefore, you would change the K000010 value in the right-hand column to a unique value, creating a new Anthropology Major Code value in FSCM 9.0.

- If the Staffing Front Office 8.4/8.8 Major Code value is not present in the report but there is a Major Code value in Staffing Front Office 8.4/8.8 that represents the same value as a Major Code value listed in your report, you must change the value in FSCM (right-hand Major Code column on this page) so that the Staffing Front Office 8.4/8.8 value maps to the correct FSCM Major Code value.

For example, K000008 refers to French in Staffing Front Office 8.4/8.8 and appears in the left-hand Major Code column. However, K000001 refers to French in FSCM. Your page will populate with K000008 in the left-hand column mapping to K000008 in the right-hand column. You must change the K000008 to K000001 in the right-hand Major Code column, mapping the K000008 French value in Staffing Front Office to the K000001 French value in FSCM.

5. Save the page.

The page will not save until all Major Code values are unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-10: Mapping School Code

As part of the upgrade, Schools in Staffing Front Office 8.4/8.8 are upgraded to Schools in FSCM 9.0. The School table in Staffing Front Office 8.4/8.8 has a two-element key made up of School Code and Country. The School table in FSCM 9.0 also has a two-element key made up of School Code and Country.

If you already use Competency Management tables in FSCM for other purposes, such as tracking competencies of non-billable personnel, it is possible that some school values are already present in the new FSCM 9.0 table. If this is the case, you must resolve the Staffing Front Office 8.4/8.8 and FSCM values so that the FSCM values do not get overwritten. You either add new School values in FSCM from the School values in Staffing Front Office 8.4/8.8 or you map the existing Staffing Front Office 8.4/8.8 School values to School values in FSCM.

If you do not use Competency Management tables in FSCM, you simply upgrade the school values from Staffing Front Office 8.4/8.8 to School values in FSCM 9.0.

To map Staffing Front Office School values to FSCM School values:

1. Select Set Up Staffing, Upgrade, School Code to School Code.

School Code to School Code

Customize Find View All First 1 of 1 Last					
	School Code	Country	School Code	Country	
1					+ -

Preload Data

Save
 Notify

Add
 Update/Display

School Code to School Code page

2. Select the Preload Data button.

This will populate the School Code and Country columns (on the left-hand side of the page) with the Staffing Front Office 8.4/8.8 values. It will also populate the right hand School Code and Country columns auto-generated values that will map to FSCM.

Only the School values listed on this page are being upgraded to FSCM 9.0.

Note. The Preload Data button only appears the first time this page is loaded.

3. If you are already using the Schools table in FSCM proceed to step 4.
Otherwise, save this page and skip the remainder of these steps.
4. Retrieve the School Code with Country (UPG_FOQ05) report you generated earlier in the upgrade process.

This report lists all of the School Code values as they are set up in your FSCM database. Using this report as a reference, verify if any of the Staffing Front Office 8.4/8.8 School Code values (from the left-hand columns on this page) already exist in your report. If so there are three possible scenarios and solutions:

- If the combination of Front Office School Code and Country code is already present in the report and the values refer to the same context, no action is required.

For example, BEL and KBS003 in combination refer to the University of Antwerp in both Staffing Front Office 8.4/8.8 and in FSCM. On this page, they should map to each other.

- If the Staffing Front Office School Code-Country combination (from the left-hand columns on this page) is already present in your report but the values refer to different contexts in Staffing Front Office and FSCM you must change the School Code-Country combination (in the right-hand column) to create a unique School Code/Country combination.

For example, BEL and KBS003 refer to the University of Antwerp in Staffing Front Office 8.4/8.8 but BEL and KBS003 refers to University of Belgium in FSCM. The left-hand column on this page populates BEL and KBS003 for Staffing Front Office (referring to the University of Antwerp) and in the corresponding right-hand columns BEL and KBS003 have auto-populated. From your report you know that BEL and KBS003 refer to the University of Belgium. Therefore, you must change the right-hand columns to a value unique to FSCM to refer to the University of Antwerp, such as BEL and KBS010.

- If the Staffing Front Office 8.4/8.8 School Code/Country combination is not present in the report but there is a School Code/Country combination value listed in your report, you must change the value in FSCM (right-hand School Code/Country columns on this page) so that the Staffing Front Office 8.4/8.8 combination maps to the correct FSCM School Code/Country combination.

For example BEL and KBS003 refer to the University of Antwerp in Staffing Front Office 8.4/8.8 but BEL and KBS015 refer to the University of Antwerp in FSCM. You must change the values in the right-hand column (those that correspond to BEL KBS003) from the auto-generated values of BEL and KBS003 to BEL and KBS015. This maps the University of Antwerp in Staffing Front Office to the University of Antwerp in FSCM.

5. After reviewing the values, click Save.

The page will not save until all values are unique.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-11: Printing Translate Values for NAME_PREFIX

The NAME_PREFIX field translate values used in your previous Staffing Front Office 8.4/8.8 release will be replaced by the prompt values of the Salutation Codes table in FSCM 9.0.

You must manually enter all of your “old” (Staffing Front Office 8.4/8.8) NAME_PREFIX translate values into the setup component of Salutation Codes in FSCM 9.0, later in the upgrade. In order to complete that step, you will need to make note of the translate values in your Staffing Front Office 8.4/8.8 database.

To look up translate values for NAME_PREFIX:

1. Select PeopleTools, Utilities, Administration, Translate Values.
2. Open the field NAME_PREFIX.
3. Print or save an image of this information for your records.

You will need this data later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-4-12: Printing Translate Values for SCHOOL TYPE

The SCHOOL_TYPE field translate values used in Staffing Front Office 8.4/8.8 are replaced by the prompt values of the School Type table in FSCM 9.0.

You must manually enter all of your “old” (Staffing Front Office 8.4/8.8) translate values from the field SCHOOL_TYPE into the set up component of School Type in FSCM 9.0 later in the upgrade process. Therefore, you need to make note of all translate values of the SCHOOL_TYPE field in your Front Office database to use for reference.

To look up SCHOOL_TYPE translate values:

1. Select PeopleTools, Utilities, Administration, Translate Values.
2. Open the SCHOOL_TYPE field.
3. Print or save an image of this information for your records.

You will need this information later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-5: Exporting Front Office Data

This section discusses:

- Understanding Front Office Data Export
- Updating Configuration Manager Profile
- Exporting Front Office NonStable Tables
- Exporting Front Office Stable Tables

Understanding Front Office Data Export

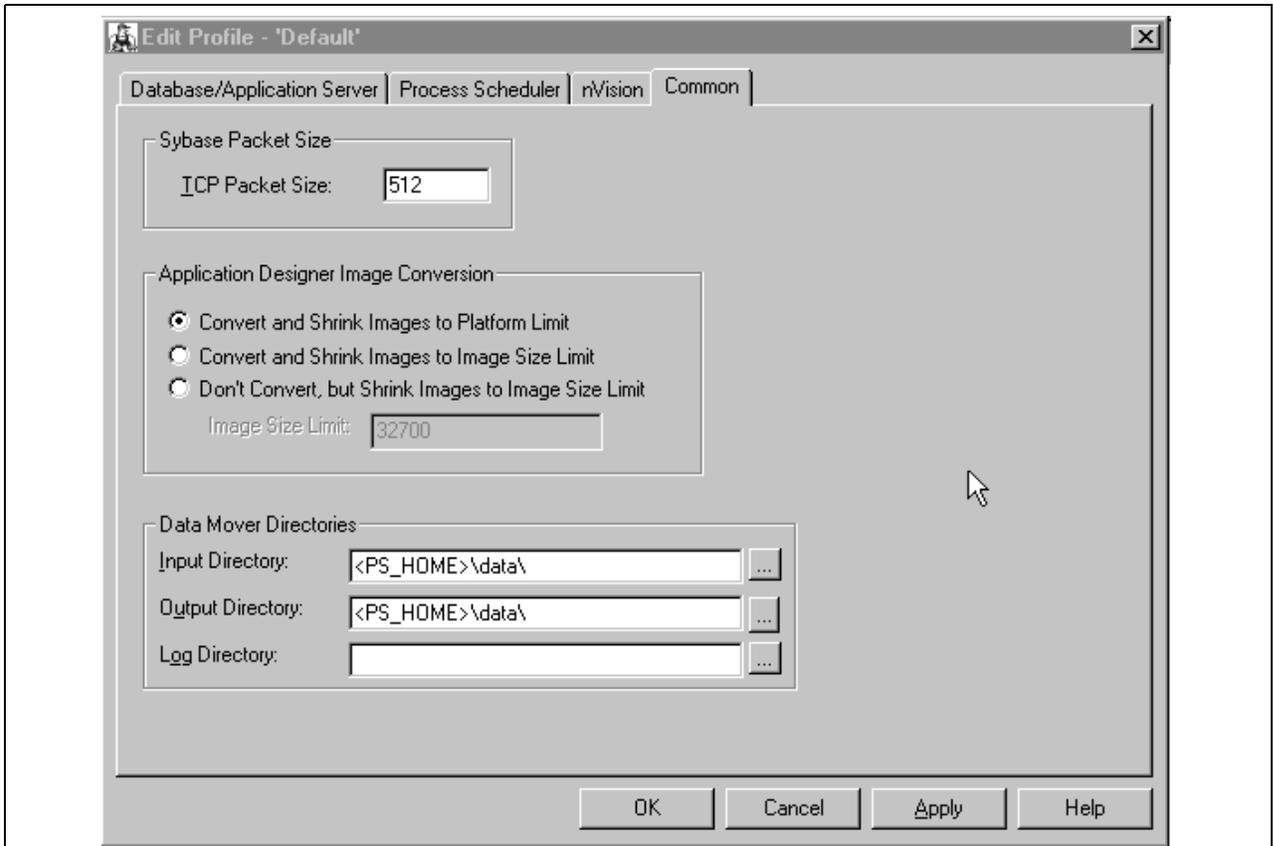
In this task you export your data from your PeopleSoft Staffing Front Office 8.4 /8.8 database. Later in the upgrade you will import this data into your FSCM 9.0 database.

Task 2-5-1: Updating Configuration Manager Profile

The Configuration Manager default profile needs to be updated to use values for your new release PS_HOME. Change Assistant uses this information to run automated steps for the rest of the upgrade. These are settings on the workstation and you need to do this for each workstation you may use during the upgrade.

To update the profile:

1. Open Configuration Manager.
2. On the Profile tab, select the Default profile.
3. Click Edit and select the Common tab.



Edit Profile - Default dialog box

Note. The Input Directory value must be <PS_HOME>\data, where you replace <PS_HOME> with your new codeline installation directory. The Output Directory value must be the same as the Input Directory value.

4. Enter a value to point to the directory where you want your Data Mover logs to be saved.
5. Select the Process Scheduler tab and verify your SQR settings.

Change Assistant will use these to launch SQR.

Properties

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

Task 2-5-2: Exporting Front Office NonStable Tables

In this step you will export the non-stable Staffing Front Office tables from your Staffing Front Office 8.4/8.8 database. This data will later be imported into your FSCM 9.0 database.

Note. You will run these scripts on your Staffing Front Office database.

If you are upgrading from Staffing Front Office 8.4 the script for your path is:

```
PUFOFOJ25E.DMS
```

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
PUFOFOR25E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-5-3: Exporting Front Office Stable Tables

In this step you will export your Staffing Front Office Stable tables from your Staffing Front Office 8.4/8.8 database. This data will be imported into your FSCM 9.0 database later in the upgrade.

Note. You will run these scripts on your Staffing Front Office database.

If you are upgrading from Staffing Front Office 8.4 the script for your path is:

```
PUFOFOJ26E.DMS
```

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
PUFOFOR26E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Both	Staffing Front Office	All	All

Task 2-6: Performing General Options Setup

This section discusses:

- Populating UPG_CONV_TBL Table

Task 2-6-1: Populating UPG_CONV_TBL Table

This step runs an import script against your FSCM 9.0 system database, to populate a row in the UPG_CONV_TBL table. The data reflects what upgrade path you are running. Data conversion uses this data later in the upgrade, to determine what conversions should be run.

If you are upgrading from Staffing Front Office 8.4, the script for your path is:

```
DLFOFOJ33.DMS
```

If you are upgrading from Staffing Front Office 8.8, the script for your path is:

```
DLFOFOR33.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

CHAPTER 3

Apply Application Changes

This chapter discusses:

- Understanding Application Changes
- Importing Front Office Data
- Modifying the Database Structure
- Loading Data for Data Conversion
- Applying Updates Before Data Conversion
- Configuring Scheduler and Server
- Backing Up Before Data Conversion
- Running Data Conversion for Front Office
- Backing Up After Data Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports
- Configuring the Upgrade Environment
- Configuring Front Office and PayBill
- Reconfiguring Security
- Backing Up Before Testing
- Testing Your Upgraded System Database

Understanding Application Changes

Earlier in the upgrade, you made various application changes. Now it is time to apply these application changes to your Target database.

Task 3-1: Importing Front Office Data

This section discusses:

- Understanding Front Office Data Import

- Importing Front Office Tables From File
- Importing Front Office NonStable Tables
- Importing Front Office Stable Tables
- Building Front Office Create Indexes Script
- Running Front Office Create Indexes Script

Understanding Front Office Data Import

In this task you import data from your old Staffing Front Office database into your installed FSCM 9.0 database.

Task 3-1-1: Importing Front Office Tables From File

In this task you import Staffing Front Office tables from a project file into your FSCM database.

If you are upgrading from Staffing Front Office 8.4 the project for your path is:

```
UPGFO2FINTBLS_84
```

If you are upgrading from Staffing Front Office 8.8 the project for your path is:

```
UPGFO2FINTBLS_88
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-1-2: Importing Front Office NonStable Tables

In this step you import the Staffing Front Office 8.4/8.8 non-stable tables you exported earlier in the upgrade, into your FSCM 9.0 database.

If you are upgrading from Staffing Front Office 8.4 the script for your path is:

```
PUEPFOJ28I.DMS
```

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
PUEPFOR28I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-1-3: Importing Front Office Stable Tables

In this step you import the Staffing Front Office 8.4/8.8 stable tables you exported earlier in the upgrade, into your FSCM 9.0 database.

If you are upgrading from Staffing Front Office 8.4 the script for your path is:

```
PUEPFOJ27I.DMS
```

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
PUEPFOR27I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-1-4: Building Front Office Create Indexes Script

In this step, you generate the SQL script to recreate the indexes for all records in the Staffing Front Office project.

If you are upgrading from Staffing Front Office 8.4 indexes will be created for the tables in the following project:

```
UPGFO2FINTBLS_84
```

If you are upgrading from Staffing Front Office 8.8 indexes will be created for the tables in the following project:

```
UPGFO2FINTBLS_88
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-1-5: Running Front Office Create Indexes Script

This step runs the SQL script you generated in the previous step, which recreates all the indexes for all records in the Staffing Front Office project.

If you are upgrading from Staffing Front Office 8.4 the script for your path is:

```
UPGFO2FINTBLS_84_CRTIDX.SQL
```

If you are upgrading from Staffing Front Office 8.8 the script for your path is:

```
UPGFO2FINTBLS_88_CRTIDX.SQL
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-2: Modifying the Database Structure

This section discusses:

- Building the Upgrade Tables Script
- ReCreating Upgrade Tables
- Building the Front Office Upgrade Tables Script
- ReCreating Front Office Upgrade Tables
- Creating Upgrade Views

Task 3-2-1: Building the Upgrade Tables Script

This step generates the SQL script to drop and re-create all the tables in the project named UPGCONVERT. These tables will be used during data conversion by Application Engine programs. They can be safely dropped at this time because they do not contain application data required by your PeopleSoft system. The script name for your upgrade path is:

UPGCONVERT_CRTTBL.SQL

Properties

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

Task 3-2-2: ReCreating Upgrade Tables

This step runs the SQL script you generated to create all tables in the project named UPGCONVERT. The script name for your upgrade path is:

UPGCONVERT_CRTTBL.SQL

Properties

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

Task 3-2-3: Building the Front Office Upgrade Tables Script

This step generates the SQL script to drop and re-create all the tables in the project named UPGCONVERT_FO. These tables are used during data conversion by Application Engine programs. They can be safely dropped at this time because they do not contain application data required by your PeopleSoft system.

The script name for your upgrade path is:

UPGCONVERT_FO_CRTTBL.SQL

Properties

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

Task 3-2-4: ReCreating Front Office Upgrade Tables

This step runs the SQL script you generated to create all the tables in the project named UPGCONVERT_FO.

The script name for your upgrade path is:

```
UPGCONVERT_FO_CRTTBL.SQL
```

Properties

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

Task 3-2-5: Creating Upgrade Views

This step will create the views included in the project definition UPGVIEWS. These views are only needed for the manual setup tasks between here and running data conversion as well as data conversion itself.

Properties

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

Task 3-3: Loading Data for Data Conversion

This section discusses:

- Running Required for Upgrade Data
- Updating the Installation Option

Task 3-3-1: Running Required for Upgrade Data

This step imports the Data Conversion Driver table. The script and .dat file are located on the upgrade home page in Customer Connection. These files should have been saved to your new release codeline at the start of the upgrade.

The script for your upgrade path is:

```
UPG_REQ_DATA.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-3-2: Updating the Installation Option

This step runs a script to update the installation option on your FSCM System database (Target) for the Staffing Front Office upgrade.

The script for your upgrade path is:

```
DLEPFOX34.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-4: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your System database. Now is a great time to check Customer Connection again for any new postings, and apply them now. Before data conversion, you should also verify that you have the most current UPGCONVERT.EXE and UPGCONVERT_FO.EXE.

This is just one place that you can apply updates. There are other places in the upgrade process where applying updates may be applicable as well. How you apply the update varies depending on where you are in the upgrade.

See Appendix: “Applying Fixes Required for Upgrade.”

Important! Apply all fixes listed under the product line/release, even if you have not licensed the product the fix is listed under. There are many interdependencies between products and database objects. If you do not apply the fix, you may be introducing another error in a different area of the conversion code.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade Change Packages using the “Download Change Package” functionality in Change Assistant.
2. Use Change Assistant to install and apply the updates into your System database for this upgrade pass. Review the documentation included with each update prior to applying the update.

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

3. Migrate the Change Packages into the Target database for this upgrade pass. If needed, first set up Change Assistant with the environment information for your Target database.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-5: Configuring Scheduler and Server

You can manually run data conversion jobs on the server. Refer to the appendix “Improving Performance” for instructions. If you choose to run data conversion manually, configure and start your process scheduler and application servers now.

Tips for configuring and starting the application server:

- Make sure the application server domain being configured points to the Target database for this pass of the upgrade.
- Set a different JSL port for each database instance.

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

See Getting Started on Your PeopleSoft Upgrade, “Improving Performance.”

See Appendix: “Improving Performance.”

Properties

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

Task 3-6: Backing Up Before Data Conversion

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

Properties

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

Task 3-7: Running Data Conversion for Front Office

This section discusses:

- Understanding Front Office Data Conversion
- Reviewing Data Conversion Tips
- Running Data Conversion for Group 12

Understanding Front Office Data Conversion

In this task you run data conversion on your Staffing Front Office data that you imported into your FSCM 9.0 database.

Task 3-7-1: Reviewing Data Conversion Tips

This section discusses:

- Upgrade Driver Program – UPG_DATACONV
- Data Conversion Documentation
- Writing Data Conversion for Your Non-PeopleSoft Records
- Data Conversion Errors Expected During the Initial Upgrade Pass
- Restarting Data Conversion

Upgrade Driver Program – UPG_DATACONV

UPG_DATACONV is an Application Engine program designed to run all upgrade data conversions. Each time the program is run during an upgrade pass, Change Assistant passes a group number parameter to the program. The program then reads the table PS_UPG_DATACONV, selecting all rows with that group number 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. You can review the sections that are called by the Upgrade Driver program by accessing the Define Upgrade Drivers page on the System database.

Data Conversion Documentation

Each section called by the Upgrade Driver program contains comments describing the underlying conversion. By running the UDATACNV SQR report you can find which sections are called by the Upgrade Driver program and what they are doing.

See Appendix: “Using Data Conversion Utilities.”

Writing Data Conversion for Your Non-PeopleSoft Records

The data conversion code delivered for this upgrade was written to handle only PeopleSoft-delivered records. You may have added your own records to the system. To convert data in the underlying tables, you may need to create your own Application Engine library. The Upgrade Driver program can call an Application Engine library section that you create. To have the Upgrade Driver program call your custom section during this task, you will need to add the section on the Define Upgrade Drivers page.

See Appendix: “Using Data Conversion Utilities.”

Data Conversion Errors Expected During the Initial Upgrade Pass

During your initial upgrade pass you can expect to have data conversion programs fail. This is because your PeopleSoft installation is unique, which makes it difficult to write data conversions that will work for everyone all of the time. Your database may be larger than most, you may have customized PeopleSoft-defined records. These differences will cause data conversion to fail. You must fix each problem on your initial System and restart the Application Engine program. Make a note of all your Data Conversion fixes, and apply them to your System database before running Data Conversion in every subsequent Move to Production pass so that it runs smoothly.

If you have customized records that are delivered from PeopleSoft, you may need to make changes to the Application Engine programs to handle these customizations. For example, here are two situations in which you may need to customize data conversion code:

- If you added fields to a PeopleSoft-delivered record, you may need to add your additional fields to the conversion code for those records.
- If a PeopleSoft-delivered record you customized will be deleted, you may need to add your own conversions to move the data to a new location.

To use the Find In feature of Application Designer to determine which Application Engine programs affect your customized records:

1. Create a project and add all Application Engine programs and related objects that have a name starting with 'UPG' and save the project.
2. Click Edit, Find In and enter each customized record name in the Find What field and your project name in the Project field.
3. Click Find, and the results will appear in the output window.

Document any changes you make to data conversion programs. This way, if a new version of the program is delivered through Customer Connection, you will know exactly what changes you have made. You can then reapply the changes to the new version of the program.

If your database is large, you may have data conversion programs that fail due to running out of space as you move data from one table to another. This problem can happen on all DBMS platforms, but is more of a problem on those platforms using Tablespace. If your data conversion terminates abnormally with a space error, examine the Application Engine SQL statements that caused the problem. Determine where the data is coming from and how much will be moved. Have your DBA adjust the allocated space accordingly. The data conversion can then be restarted.

Restarting Data Conversion

Before restarting a data conversion step, rename the log file. Change Assistant uses the same log file name each time you rerun or restart an Application Engine program. This means that the restarted Application Engine program will replace the original log file if it is not renamed.

If your data conversion program fails, fix the problem on your System and restart the program. When you set the data conversion step to Restart in your Change Assistant job, it will rerun the program using the `PROCESS_INSTANCE` and `RUN_CNTL_ID` from the initial run and the conversion will restart right after the last committed SQL command. Application Engine keeps track of data committed to the database in the table `PS_AERUNCONTROL`, keyed by `PROCESS_INSTANCE` and `RUN_CNTL_ID`.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Staffing Front Office	All	All

Task 3-7-2: Running Data Conversion for Group 12

This step runs the UPG_DATACONV Application Engine program for Group 12. If you want to see additional documentation for Group 12, then run the UDATAACNV report.

Properties

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

Task 3-8: Backing Up After Data Conversion

Back up your database now. This enables you to restart your upgrade from this point, should 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

Task 3-9: 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.

Note. Do not update statistics after you complete this task.

Properties

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

Task 3-10: 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
- Run a Final SETINDEX Report
- Run a Final SETTABLE Report

Task 3-10-1: 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 3-10-2: 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 3-10-3: 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. 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 3-10-4: 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 3-10-5: 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.

See *Finalizing the Database Structure*.

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

Properties

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

Task 3-10-6: Run a Final SETINDEX Report

The SETINDEX SQR updates index overrides stored in the PSIDXDDLPRM table. The SQR updates the values stored in the PARMVALUE field with current values found in the system catalog. Running SETINDEX cleans up fragmentation issues that may have occurred during data conversion.

Properties

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

Task 3-10-7: Run a Final SETTABLE Report

The SETTABLE SQR updates table overrides stored in the PSRECDDLPRM table. The SQR updates the values stored in the PARMVALUE field with the current values found in the system catalog. Running SETTABLE will clean up fragmentation issues that may have occurred during data conversion.

Properties

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

Task 3-11: Configuring the Upgrade Environment

This section discusses:

- Configure Application Server
- Configure Portal

Task 3-11-1: Configure Application Server

Running Portal requires a fully functional application server domain. In this step, you configure your application server.

Note. If you configured your application server earlier in the upgrade, you can skip this step.

Tips for configuring and starting the application server:

- Make sure that the Application Server domain you configure points to the Target database for this pass of the upgrade.
- Set a different JSL port for each database instance.

See the Enterprise PeopleTools installation guide for your database platform.

Properties

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

Task 3-11-2: Configure Portal

PeopleSoft applications are accessed through the Portal. You need to grant users access to complete the upgrade process. You must install and configure the Portal to complete the upgrade.

Note. If you configured your Portal earlier in the upgrade, you can skip this step.

You also must define a password on the Node Definitions page for Single Signon to work properly. If you do not define a password, the signon page appears when trying to access a report directly, instead of the report itself. To avoid this issue, follow the procedure below to assign a password.

To assign a password:

1. Select PeopleTools, Integration Broker, Integration Setup, Nodes.
2. Click Search.
3. Select the database's default local node.
The default local node shows a *Y* in the Default Local Node column.
4. On the Node Definitions page, select *Password* in the Authentication Option field.
5. Enter a password in the Password field.
6. Enter the password again in the Confirm Password field.
7. Enter the default user in the Default User ID field.
8. Save the node definition.
9. Reboot the application server and web server.

See the Enterprise PeopleTools installation guide for your database platform.

Properties

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

Task 3-12: Configuring Front Office and PayBill

This section discusses:

- Understanding Front Office Configuration
- Configuring School Type Values
- Configuring Salutation Table Values
- Running Cache Administration

Understanding Front Office Configuration

This task will guide you through the final set up for your Staffing Front Office data as it now resides in the FSCM 9.0 database.

Task 3-12-1: Configuring School Type Values

The School Type field is validated based on the contents of a set up table rather than translate values in FSCM 9.0.

The SCHOOL_TYPE field translate values used in your previous Staffing Front Office release are replaced by the prompt values of the School Types table in FSCM 9.0. You must manually configure the School Type component so that the prompt table contains all of the SCHOOL_TYPE translate values from your previous release.

To configure School Type Values:

1. Retrieve the SCHOOL_TYPE field information you found in the step, “Printing Translate Values for SCHOOL_TYPE” in chapter 1 of the upgrade.
2. Select Set Up Financials/Supply Chain, Common Definitions, Resources Data, School Types.
3. Enter a Set ID.
4. In the School Type Code field, enter a translate value of the field SCHOOL_TYPE.
5. In the Description field, enter the “old” (Staffing Front Office 8.4/8.8) Long Name of the translate value.
6. In the Short Description field, enter the “old” Short Name of the translate value.
7. Save the component.
8. Repeat these steps until all Staffing Front Office 8.4/8.8 School Type translate values have been entered into the set up component.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-12-2: Configuring Salutation Table Values

This section discusses:

- Understanding Salutation Table Values
- Configuring Salutation Table Values for Staffing Front Office

Understanding Salutation Table Values

The NAME_PREFIX field translate values used in Staffing Front Office 8.4/8.8 are replaced by the prompt values of the Salutation Codes table in Staffing Front Office in FSCM 9.0. You must manually configure the Salutation Codes component so that the prompt tables contain all the translate values from your previous NAME_PREFIX field in Staffing Front Office 8.4/8.8.

Configuring Salutation Table Values for Staffing Front Office

In this step configure your Salutation Table values.

To configure Salutation Table values:

1. Retrieve the NAME_PREFIX translate values you printed earlier in the task titled Print Translate Values of NAME_PREFIX.
2. Select Set Up Financials/Supply Chain, Common Definitions, Customers, Salutation Table.
3. In the Salutation Code field, enter a translate value from your list of NAME_PREFIX values you printed out.
4. In the Description field, enter the long name of the translate value as it is in Staffing Front Office 8.4/8.8.
5. In the Short Description field, enter the short name of the translate value as it is in Staffing Front Office 8.4/8.8.
6. Save the page.
7. Repeat these steps for all translate values on your list.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-12-3: Running Cache Administration

In this step, a process is run so that you can see your upgraded Applicants and Employees.

To run the Cache Administration process:

1. Select Set Up Financials/Supply Chain, Common Definitions, Resource Search, Cache Administration.

2. Select the Maintain Search Index tab.
3. Select the search type of Staffing.
This enables the Miscellaneous tab.
4. On the Miscellaneous tab, select Maintain Employee Data Cache.
5. Select Create New to run the process.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-13: Reconfiguring Security

The security model used in your previous Staffing Front Office database, has changed considerably for FSCM 9.0 due to the merge of Staffing Front Office 8.4/8.8 into FSCM 9.0. Therefore, after data conversion, you are required to set up operators, roles, permission lists, and department security tables among other components in the FSCM 9.0 database to reconfigure security.

At this time please refer to your release's PeopleBooks for information on how to set up the security for FSCM 9.0.

See PeopleSoft Enterprise Portal Solutions PeopleBook: Enterprise Portal Application Technology.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Staffing Front Office	All	All

Task 3-14: Backing Up Before Testing

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

See Appendix: "Planning for Upgrade Testing."

Properties

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

Task 3-15: Testing Your Upgraded System Database

In this task, you test your upgraded System database. Testing your upgraded System database will ensure that you can still operate your day-to-day processes on your new release. After you have reviewed your DDDAUDIT and SYSAUDIT, verify that the system is working properly by reviewing the system online. After you are comfortable that the system is working properly, you can perform the Test Move to Production upgrade pass.

See Appendix: “Planning for Upgrade Testing.”

Properties

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

CHAPTER 4

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. Oracle recommends that you read each appendix as it is referenced in the documentation.

APPENDIX A

Applying Fixes Required for Upgrade

This appendix discusses:

- Preparing to Apply Fixes
- Applying Fixes During Installation
- Applying Fixes After Copying Project
- Applying Fixes After Data Conversion
- Applying Fixes Between Upgrade Passes
- Applying Fixes in Move to Production

Task A-1: Preparing to Apply Fixes

This appendix gives general instructions for applying a Required for Upgrade fix for your upgrade. If the directions given in a particular fix are different from those given here, then follow the instructions in the fix.

It is important that you run your upgrade using the latest versions of all upgrade software. In Customer Connection, check the upgrade page and the Updates and Fixes page to ensure that you have all of the latest code.

Ideally, you should follow the steps below to apply the various files and fixes.

To apply files and fixes:

1. Install the new release from the CD.
2. Apply any additional scripts and projects from the Customer Connection upgrade page to your new release codeline (and to the New Release Demo database, if applicable).
3. Apply any other Required for Upgrade fixes from Customer Connection's Updates and Fixes to your new release codeline (and to the New Release Demo database, if applicable).
4. Run your initial pass of the upgrade.
5. Before you begin each subsequent upgrade pass, check the upgrade page for new versions of any files you previously applied.

Then check Updates and Fixes for any new Required for Upgrade fixes.

Your initial upgrade pass will differ from your subsequent Test Move to Production passes. Some of the upgrade tasks and steps are common to both the initial upgrade pass and the Move to Production pass. For this reason, you may find Required for Upgrade fixes that do not apply to the upgrade pass that you are currently performing. The details provided with each fix will help you determine whether to apply the fix and when to apply it. The fix will also tell you what to do if you have already passed the step for which the fix is needed.

How you apply a fix depends on where you are in the upgrade process. This appendix explains how to apply a typical fix, and is organized by the various points within the upgrade where you will apply fixes.

Task A-2: Applying Fixes During Installation

In the chapter, “Install the Software,” of *Getting Started on Your PeopleSoft Upgrade*, you should first download and apply all files and objects from the upgrade page on PeopleSoft Customer Connection. Then you must download all Required for Upgrade fixes from Updates and Fixes on PeopleSoft Customer Connection. You can use the instructions in this section to apply any additional fixes that are posted, until you reach the task, “Running New Release Compare Reports.”

If a fix contains a project that needs to be copied from a file, apply it to your New Release Demo database during installation. If the project contains changes for records or fields, those objects will be updated during the normal compare and copy steps in the upgrade. You will not have to build objects in the project separately or consider whether it will have an impact on customizations. You will do that with the rest of the objects during the upgrade. Apply as many of the fixes as you can at this time.

To apply script fixes during installation:

1. Download Required for Upgrade change packages using the “Download Change Package” functionality in Change Assistant.
2. Use Change Assistant to apply the updates into your New Release Demo database.

Review the documentation included with each update prior to applying each update. There may be manual steps that need to be performed in order to successfully apply the update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, “Applying Updates.”

Task A-3: Applying Fixes After Copying Project

It is best not to apply fixes during the compare and copy tasks in the “Run and Review Compare Reports” and “Apply Application Changes” chapters of the initial upgrade pass. It can also be cumbersome to apply record and field changes during the creating and altering of tables in the “Complete Database Changes” chapter. It is, therefore, best to wait until just before the “Running Data Conversions” task in the “Apply Application Changes” chapter to apply additional fixes. Most of the fixed objects will be data conversion code, delivered in projects.

To apply PeopleSoft project fixes before data conversion:

1. Download Required for Upgrade change packages using the “Download Change Package” functionality in Change Assistant.
2. Use Change Assistant to apply the updates into your New Release Demo database for this upgrade pass.

Review the documentation included with each update prior to applying each update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, “Applying Updates.”

3. The project is now loaded on your New Release Demo database. You should run a project compare to make sure that the objects in the fix will not overwrite any of your customizations.

If you find customizations, you must decide how to deal with them before you copy the fix to your Copy of Production.

4. If you are performing a Move to Production upgrade pass, first migrate the change packages into the Source database for this upgrade pass.

If needed, first set up Change Assistant with the environment information for your Source database. If you customized any of the objects delivered in the change package, you should repackage the fix to include your customizations. If you did not customize any objects delivered in the fix you may directly apply them to your Source database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, “Applying Updates.”

5. Migrate the change packages into the Target database for this upgrade pass.

If needed, first set up Change Assistant with the environment information for your Target database.

Task A-4: Applying Fixes After Data Conversion

At this point, you have already converted all of your data for the upgrade pass, and you cannot apply Application Engine program fixes and use them in this upgrade pass. You should refer to the fix instructions to determine what to do in each case. Often, the instructions say that you need to restore your database from a pre-conversion backup and rerun data conversion to get the benefits of the fix. Because this is the only way you can get the fix onto your current Copy of Production, you may decide to allow the error and not apply the fix until you do a Test Move to Production. Then after you have completed that test pass, you can test the affected function. However, you should not do this if your next pass is your final Move to Production, and you are going into production with the resulting database. You should always test your upgraded database between test passes if changes have been made to procedures, scripts, or programs. You do not want any surprises during the final Move to Production.

Task A-5: Applying Fixes Between Upgrade Passes

You can apply fixes just before you start a Test Move to Production pass in the same way you would in the step above, Apply Fixes After Copying Project. In those instructions, you apply the fix to your New Release Demo database and compare it to the Copy of Production. Make sure that you do the database comparison in order to verify that the fix does not wipe out any customizations you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database. Then apply the fix to your Copy of Production, which you will use as the Source database in the Test Move to Production. The fix will then get moved to your New Copy of Production when you run the MVPRDEXP.DMS and MVPRDIMP.DMS scripts in the “Apply PeopleTools Changes” chapter.

Task A-6: Applying Fixes in Move to Production

Once you have started a Test Move to Production, do not apply any fixes until just before data conversion. Apply any fixes using the previous step, “Applying Fixes After Copying Project.” In those instructions you apply the fix to your New Release Demo database and compare it to your Copy of Production. Instead of using the original Copy of Production as the Target, you must now use your New Copy of Production, the one defined as the Target in your Move to Production Change Assistant job. Be sure to do the database comparison to verify that the fix does not wipe out any customizations that you made to Application Engine programs during your initial upgrade pass. If you have made customizations, merge your customizations into the new Application Engine code on the New Release Demo database, then copy the project to your New Copy of Production.

APPENDIX B

Planning for Upgrade Testing

This appendix discusses:

- Understanding Testing Techniques
- Deciding When to Test
- Evaluating Your Testing Requirements
- Defining Your Testing Strategy
- Determining the Testing Conditions
- Developing Your Test Plan
- Developing Test Scripts
- Reviewing Tips and Techniques

Understanding Testing Techniques

As with any project, testing is a critical part of your upgrade project. With proper testing, you can ensure that you upgrade successfully and you are ready for your Move to Production.

Upgrades vary in complexity and scale from release to release and customer to customer, so the testing periods and the activities required to perform testing vary from upgrade to upgrade. Because PeopleSoft cannot anticipate how every organization uses the system to fit their own business practices, including customizations and data setup, PeopleSoft does not deliver upgrade test scripts. However, there are some general testing guidelines that you can follow to assist with your upgrade testing. In this section, you will find information that will help you plan your testing efforts.

Task B-1: Deciding When to Test

An effective testing strategy involves an understanding of the stages of a PeopleSoft upgrade and where, within these stages, testing should be performed. You can take more than one approach and use more than one method to test your upgrade.

Task B-2: Evaluating Your Testing Requirements

To evaluate your testing requirements, you need the following information:

- The number of products and modules you currently have in your production database.
- The number of customizations you have in your production database.
- The functional design and business requirements addressed by each customization.
- Your online, batch, and reporting business processes that you want to include in testing.

Task B-3: Defining Your Testing Strategy

This section discusses:

- Understanding Your Testing Strategy
- Evaluating Unit Testing
- Evaluating System Testing
- Evaluating Integration Testing
- Evaluating Parallel Testing
- Evaluating Performance Testing
- Evaluating User Acceptance Testing
- Evaluating Regression Testing

Understanding Your Testing Strategy

Once you evaluate your testing requirements, you can determine what types of testing you need. You should define the tests to be performed for the project and the goals of each test—including roles and responsibilities, test-case management, control points, and success criteria. In addition, you should define and document the scope of each type of testing. Use the definitions below to determine the levels of testing required in your organization.

To ensure upgrade success, be sure to train upgrade members before the upgrade. It is critical to have educated testers to ensure adequate test coverage of new functionality.

The testing types below do not necessarily run systematically, one after another. Different test conditions can sometimes run in parallel.

Important! It is important to test not only your customizations and changes in your new release but also your standard business practices. By doing this you ensure that your normal business practices have not been altered by the new release and/or your customizations.

Task B-3-1: Evaluating Unit Testing

In this stage of testing, you have completed your upgrade tasks and your database is now at the new release level. However, you should unit test before you use the new system. Unit testing validates data, business rules, and business process requirements. In addition, it ensures that business processes work as designed and your database is ready for full functionality testing. The processes for performing unit testing are described below:

- Test individual online transactions and batch processes on the upgraded database.
- Validate data converted during the upgrade.
- Verify that you can access existing data and enter new data successfully.
- Test customizations reapplied to the upgraded database.
- Each customization is tested individually along with all related processes.
- Business processes are not tested.
- Test scripts are not required.
- Test – Document – Resolve issues – Retest.

Task B-3-2: Evaluating System Testing

System testing ensures that all business functions and processes execute appropriately from the customer's view. Business processes are tested from beginning to end during system testing; this is sometimes referred to as end-to-end testing. The processes for performing system testing are described below:

- Create system test environment via a test Move to Production.
- Test inbound and outbound interfaces and related business processes.
- Test online business processes using relevant security (that is, user IDs, roles, and permission lists).
- Test batch business processes.
- Test reporting processes (SQR, PS/Query, nVision, and Crystal).
- Test customizations to business processes.
- Perform using test scripts.
- Compare expected results to actual results.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task B-3-3: Evaluating Integration Testing

After system testing, you perform integration testing. In this stage, you test business processes and groups of related business processes within the application to determine that they function as designed. In addition, you ensure that any design flaws are resolved before user testing. The following list of activities describes integration testing:

- Create integration test environment via a test Move to Production.
- Test specific business processes.
- Test integration between modules and business processes.
- Perform using test scripts.
- Compare expected results to actual results.

- Test – Document – Resolve issues – Retest – Document – Sign off.

Task B-3-4: Evaluating Parallel Testing

Parallel testing validates that the current production system and the upgraded database generate the expected results for specific business events. Parallel testing is optional, but frequently used to ensure that the new release will generate the same results given the same testing scenarios. The processes for performing parallel testing are described below:

- Create a parallel test environment via a test Move to Production.
The Copy of Production should be taken before the major business processes/events are executed so that the same processes can be run during the parallel test.
- Retain any output from production processes for later comparison.
- Run the same business processes/events in the upgraded database.
- Compare results generated in the production system with the results generated using the upgraded database.
- Perform using test scripts.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task B-3-5: Evaluating Performance Testing

You conduct performance testing to determine if the system can accomplish stated objectives within a specified time period. Performance of the current production system is often used as a baseline. The processes for performing performance testing are described below:

- Define performance objectives for each business process included in the scope of the test.
- Perform business process.
- Monitor performance.
- Compare actual performance and acceptance criteria.
- Perform using test scripts.
- Test – Document – Resolve issues – Retest – Document – Sign off.

Task B-3-6: Evaluating User Acceptance Testing

User acceptance testing determines if day-to-day users can complete daily work activities within the system with an acceptable level of effort. For example, run through business processes such as hiring, terminating, and paying an employee in Human Resources or creating, editing, and posting journals in Financials. The processes for performing user acceptance testing are described below:

- Functional resources should execute test scenarios (with their appropriate production security access to ensure they have access to all the components, pages, and processes used in their daily functions).
- Perform using test scripts.
- User testing should not be performed with developer or Super User access.
- Test – Document – Resolve issues – Retest – Test – Document – Sign off.

Task B-3-7: Evaluating Regression Testing

You perform regression, or re-testing, if problems were found and resolved or changes were made during any of the previous tests. This stage of testing validates the test Move to Production and Move to Production parts of the upgrade. When all the tests have received sign-off, you will use the initial Copy of Production to upgrade the production database/environment. You then perform a test move into the production environment and customers confirm that the test move executed successfully. At this point you conduct regression testing. The following tips will assist you with regression testing:

- Ensure that no new defects have been introduced during the move.
- Execute a predefined set of scripts to confirm the test move.
- Performed by Functional Resources before *Go Live*.
- Rerun scripts from previous testing.

Task B-4: Determining the Testing Conditions

After you identify the types of testing to include in your upgrade, determine conditions for each stage of testing. Be sure to test the actual test Move to Production to resolve any technical issues in the upgrade process itself in addition to performing functional application testing. Perform the following actions for each testing type:

- Determine criteria for successful completion.
- Determine which tests you can run concurrently and which you must run serially.
- Set up test plans and test scripts you will need.
- Define the testing environment.
- Define issue resolution procedures.
- Define change control and migration procedures.
- Define which third-party tools you must install and configure.
- Identify database maintenance procedures, for example, backup and refresh.
- Evaluate the need for a testing tool to aid in the testing process.

Task B-5: Developing Your Test Plan

If you have test plans from your implementation or previous upgrades, consider modifying them for this upgrade project, ensuring that you incorporate features and functions delivered with the new release. Use existing test plans and scripts wherever possible. Identify modifications during the fit/gap analysis and complete script generation during the initial upgrade. Based on the objectives and scope defined in your testing strategy, identify the following items for each type of testing:

- Test procedures
- Assumptions
- Timing
- Deliverables

- Acceptance criteria
- Roles and responsibilities
- Resource requirements
- Training requirements
- Test environment
- Data requirements
- Issue and change control tracking procedures
- Testing Tools

Task B-6: Developing Test Scripts

The process of developing test scripts can assist with detecting problems in the requirements or design of an application. It requires thinking through the entire operation of the application. For this reason, you may find it useful to start preparing test scripts early in the upgrade cycle and, if possible, base them on existing test scripts from your implementation project or previous upgrade.

If you have test scripts from your original implementation, recycle them and modify them to accommodate new functionality. That way, you can be sure to cover your critical end-to-end business processes. You will also want to focus additional testing time on your customizations to verify that they have upgraded successfully.

If you do not have test scripts from your implementation, you can create them by documenting what you currently do within the system.

Create a test script for each business process to define the Action or Event, Input, and the expected result to determine if a feature of an application is working correctly. Functional people who are aware of current processes should write your test scripts. However, when writing test scripts, assume the person testing does not know how to use the system. Use the following procedure for developing test scripts:

- Test scripts should contain specifics, such as test identifier, test name, objective, test conditions and setup, input data requirements, steps, and expected results.
- Write as a step-by-step guide, stating what data should be entered, when, and where.
- Organize by module, business process, and process cycles.
- Create with full production security in mind.
- Create early in the upgrade process.

Make sure that your tests are consistent with the following tips:

- Action
 - Include the script name, description, and purpose.
 - Include the navigation steps within the PeopleSoft system.
 - Include navigation steps outside the PeopleSoft system.
- Input
 - Include security requirements: what User ID, Role, and Permission List should be used to perform the test.

- Specify key data elements: entering new or accessing existing data.
- Results
 - Include the exact results.
 - Print screens to support the results and print the report output.

Task B-7: Reviewing Tips and Techniques

This section discusses:

- Reducing the Time of Upgrade Process
- Performing Security Testing
- Performing Testing on Up to Date Data
- Performing Test Move to Production
- Tracking Issues
- Reviewing Testing Tools
- Discussing Change Control
- Discussing Back Up Procedures
- Evaluating Unexpected Results
- Evaluating Reasons for Failure

Task B-7-1: Reducing the Time of Upgrade Process

All testing can be performed at the end, including running the tests on the current system to obtain results for comparison. One way to reduce the overall timeframe of an upgrade is to execute the tests on the current system while the upgrade is in progress. This way you will have the results ready when the upgraded database is to be tested. This can be achieved by taking two copies of the production database at the start of the upgrade. Only one copy is upgraded, while the other remains at current release. The testing time is now reduced to only performing the tests on one database.

After each test Move to Production, you may want to turn over the upgraded database to the testing team while the technical team begins a new iteration of the test Move to Production. Conducting the two efforts in parallel may decrease the overall time required to upgrade. Any issues that are found by the testing team can be incorporated into the newly upgraded database as soon as it is available.

One approach that may be used for the Move to Production is to run the production database and upgraded database in parallel to ensure that key business processes operate as expected. Although this may require dual maintenance of data during the parallel testing period, it may minimize the impact of the actual Move to Production. If you are interested in using this method, once you have performed a test Move to Production to your satisfaction, schedule the production cutover weekend. Then, perform the next test Move to Production during that weekend. Bring the existing production system back up and run the upgraded database concurrently. If, after comparing the outcome of your critical business processes, you are satisfied with the results, simply set the upgraded database to your production system. If you are not satisfied with the results, make the necessary adjustments and perform another test Move to Production.

Task B-7-2: Performing Security Testing

It is very important that you test security on each test pass you complete. Security is a vital part of the upgrade process and if it is not tested properly before you go live with your new release, there is a great potential for failure.

Task B-7-3: Performing Testing on Up to Date Data

The previous technique will mean that testing is performed on *old* data. The copies of production may have been taken some weeks or months in the past. It will confirm that the data you started with has upgraded successfully. However, it may be required to perform the tests on the most recent data set as follows:

- Take a copy of production and upgrade
- Perform all phases of testing on the upgrade version up to unit testing
- Determine that the database is ready for full functionality testing

Task B-7-4: Performing Test Move to Production

Performing a test Move to Production is a good technique for assuring database readiness as follows:

- Take two up to date copies of the production database.
- Perform the test Move to Production steps to upgrade one of the databases.
- Execute test scripts on the remaining database.
- Perform tests on the upgraded database and compare results.

Task B-7-5: Tracking Issues

You should implement a method for tracking the tests and issues discovered during testing. Tracking issues and resolutions on a central document serves as a communication tool and minimizes duplication effort. The following tips should be considered while tracking issues:

- Categorize issues:
Critical, Major, Minor, Cosmetic
- Use a central document repository or tracking tool

Task B-7-6: Reviewing Testing Tools

SQA Robot :

- Records key strokes (like a macro recorder) into Visual Basic scripts.
- Useful for regression testing.
- SQA Manager—can be used to simulate multiple users.

Test Director by Mercury/Interactive:

- Tool that manages test scripts—tracks execution and defects.
- Useful for regression testing.

Task B-7-7: Discussing Change Control

Make sure that you have a procedure for implementing changes during the testing stage. You may have several databases, if server space permits. All changes should be made in a master database. If an issue is found during testing, the resolution should be applied to the master database and promoted via pre-defined migration procedures. Remember that a master database will also be required to perform the Move to Production.

Task B-7-8: Discussing Back Up Procedures

The following tips should be considered when backing up your data:

- Back up at baseline before testing (use a backup technique that will allow you to restore individual tables).
- Back up at key points for point in time testing.
- Implement refresh procedures to avoid duplicate data.

Task B-7-9: Evaluating Unexpected Results

In the event you receive unexpected results and you cannot determine their cause, attempt to replicate any issues you encounter in your Copy of Production database on a delivered Demo database. If the issue does occur on Demo, it should be reported to the Global Support Center. Check PeopleSoft Customer Connection to see if a fix has been posted to resolve the issue.

See PeopleSoft Customer Connection (Updates + Fixes).

Task B-7-10: Evaluating Reasons for Failure

The list below identifies reasons why your test plan might have failed:

- Testing strategy was poorly defined
- Test plans were poorly defined
- Test scripts were poorly defined
- Lack of resources and resource commitment
- Lack of understanding of the upgrade process

APPENDIX C

Upgrading Front Office and PayBill

Task C-1: Reviewing the Front Office Standalone Upgrade

If you currently only have a Staffing Front Office database you will complete what is known as the Staffing Front Office standalone upgrade. This upgrade will import and upgrade your Staffing Front Office data out of your old Staffing Front Office database and incorporate it into your new Financials/Supply Chain Management 9.0 database. Your Staffing Front Office objects will be part of the product, Staffing Front Office in FSCM 9.0, with this upgrade. After you complete this upgrade, and when you are ready to upgrade in the future, you will only need to upgrade your Financials/Supply Chain Management database.

This is a unique style of upgrade and does not follow the traditional PeopleSoft upgrade process. This follows a model in which you will copy your data out of your old database and into a brand new database before running data conversion.

APPENDIX D

Using Data Conversion Utilities

This appendix discusses:

- Understanding Data Conversion Utilities
- Using the Upgrade Driver Program
- Using the Upgrade Drivers Page
- Reviewing the Data Conversion Report

Understanding Data Conversion Utilities

This appendix contains information regarding the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table.

Task D-1: Using the Upgrade Driver Program

In order to run all data conversions in the correct sequence, Oracle has provided the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table. This program runs the Application Engine sections defined in the table PS_UPG_DATACONV. The PS_UPG_DATACONV table contains a list of all of the Application Engine sections that you need to run and in what sequence they should be run.

Task D-2: Using the Upgrade Drivers Page

This section discusses:

- Understanding Upgrade Drivers Page
- Accessing the Upgrade Drivers Page
- Adding New Upgrade Drivers Section Page
- Inactivating Upgrade Drivers Section

Understanding Upgrade Drivers Page

Before you run data conversion, you may need to change what the Upgrade Driver program runs. You can add, remove, or deactivate Application Engine sections through the Upgrade Drivers page.

You do not have an active portal on your Copy of Production during data conversion, so you need to view and update the Data Conversion Definitions on your Demo database and then copy the updated data to your Copy of Production database.

Task D-2-1: Accessing the Upgrade Drivers Page

To access the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Select Set Up Staffing, Upgrade, Upgrade AE Documentation.
4. Enter your upgrade path:

FO8X

5. Click Search.

You are now on the Upgrade Drivers page. The following are descriptions for each section of the Upgrade Drivers page.

Upgrade Drivers									
Upgrade Path	Program Name	Group #	Section	Sequence	Active Flag	Description	Comments		
CR80	UPG_CDM	1	CDMA010	10	Active	General Preparation	Comments	+	-
CR80	UPG_CDM	1	CDMX140	20	Active	Upgrade Basic Data Tables	Comments	+	-
CR80	UPG_CP	2	CPA00	100	Active	Upgrade Constraint	Comments	+	-
CR80	UPG_CP	2	CPA01	105	Active	Upgrade User Cd Detl	Comments	+	-

Upgrade Drivers page

- Upgrade Path. This field contains the upgrade path on which the section will be run.
- Program Name. This is the Application Engine program that contains the section.
- Group #. This is the group number. All sections with the same group number will be run during the same run of the UPG_DATACONV Application Engine program.
- Section. This is the section that will be called from the UPG_DATACONV Application Engine program.
- Sequence. This is the order in which the sections will be called during the run of UPG_DATACONV for the group number.
- Active Flag. This field determines whether the section will be run. If the value of this field is *Active*, the section will be run. If the value is *Inactive*, it will not be run. If you need to remove a section, change the value in this field to *Inactive*.
- Description.
- Comments.

Task D-2-2: Adding New Upgrade Drivers Section Page

Follow the instructions below to add a new section to the Upgrade Drivers page.

Note. To add a new section, the Application Engine program and section must exist on the Demo database.

To add a new section to the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Select Add a New Value.
4. Click Add.
5. Enter values for Upgrade Path and Program Name.
6. Enter a value for Group #.

Note. Each group number corresponds to a data conversion step in the Change Assistant template. If you select a group number that already exists in the PS_UPG_DATACONV table, your section will be executed when Change Assistant runs the data conversion step that corresponds to the group number you selected. Alternatively, if you assign a group number to your new section that does not already exist in PS_UPG_DATACONV, you must add a new step to your Change Assistant template. The new template step will have the same properties as the other data conversion steps, except for the group number specified in the step properties Parameters box.

7. Enter values for Section and Sequence.
The Description and Comments fields are optional.
8. Click Save.
9. When you have completed all changes, sign on to your Demo database using Data Mover and run the following script to export the updated data conversion data:

```
DLUPX03E.DMS
```

10. Sign on to your Copy of Production database using Data Mover and run the following script to load the updated data conversion data:

```
DLUPX03I.DMS
```

See the Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your new release, Appendix: "Using a Change Assistant Template."

Task D-2-3: Inactivating Upgrade Drivers Section

Follow the instructions below to deactivate a section on the Upgrade Drivers page. Once deactivated, the section will not run as part of data conversion.

To inactivate a section on the Upgrade Drivers page:

1. From your browser, sign on to the Demo database.
2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.
3. Enter your upgrade path:

```
F08X
```

4. Click Search.
5. Find the row with the Program Name and Section you want to remove and change the value of the Active Flag field to *Inactive*.
6. Click Save.

7. When you have completed all changes, sign on to your Demo database using Data Mover and run the following script to export the updated data conversion data:

```
DLUPX03E.DMS
```

8. Sign on to your Copy of Production database using Data Mover and run the following script to load the updated data conversion data:

```
DLUPX03I.DMS
```

Task D-3: Reviewing the Data Conversion Report

Each of the upgrade data conversion sections contains comments that describe the processing performed by the section. PeopleSoft has delivered an SQR to list all of these comments by the group and sequence numbers that determine how they run. The name of this report is UDATAACNV.

To run UDATAACNV:

1. Using SQRW, run SQR UDATAACNV on your Copy of Production database.
2. When prompted for Upgrade Path, enter:

```
F08X
```

3. When prompted for Group Number, enter the two-digit group number to report on, or enter 0 to see the comments for all groups.

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