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PeopleSoft Enterprise Staffing Front Office 8.8 to FSCM 9.1 Feature Pack – March 2011 Upgrade

March 2011

ORACLE

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Upgrade
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Understanding This Documentation

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

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

Prerequisites

You must complete the tasks in the document *Getting Started on Your PeopleSoft Upgrade* before beginning this upgrade. If you have not yet completed these tasks, do so now. Go to My Oracle Support and search for *Getting Started on Your PeopleSoft Upgrade*.

Audience

This documentation is written for the individuals responsible for upgrading to your new PeopleSoft release. This documentation assumes that you have a basic understanding of the PeopleSoft system. One of the most important components of a successful upgrade of your PeopleSoft installation is your on-site expertise.

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

- SQL and SQL command syntax.

- PeopleSoft system navigation.

- PeopleSoft windows, menus, and pages, and how to modify them.

- Microsoft Windows.

Oracle recommends that you complete training before performing an upgrade.

See Oracle University http://education.oracle.com

Organization

This documentation is divided into chapters that represent major milestones in the upgrade process.

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

Typographical Conventions

To help you locate and understand information easily, the following conventions are used in this documentation:

Convention	Description
`Monospace`	Indicates a PeopleCode program or other code, such as scripts that you run during the upgrade. Monospace also indicates messages that you may receive during the upgrade process.
Italics	Indicates field values, emphasis, and book-length publication titles. Italics is also used to refer to words as words or letters as letters, as in the following example: Enter the letter *O*.
Initial Caps	Field names, commands, and processes are represented as they appear on the window, menu, or page.
lower case	File or directory names are represented in lower case, unless they appear otherwise on the interface.
Menu, Page	A comma (,) between menu and page references indicates that the page exists on the menu. For example, "Select Use, Process Definitions" indicates that you can select the Process Definitions page from the Use menu.
Cross-references	Cross-references that begin with *See* refer you to additional documentation that will help you implement the task at hand. We highly recommend that you reference this documentation. Cross-references under the heading *See Also* refer you to additional documentation that has more information regarding the subject.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meaning.

Convention	Description
Note. Note text.	Text that begins with *Note* indicates information that you should pay particular attention to as you work with your PeopleSoft system.
Important! Important note text.	A note that begins with *Important!* is crucial and includes information about what you need to do for the system to function properly.
Warning! Warning text.	A note that begins with *Warning!* contains crucial configuration information or implementation considerations; for example, if there is a chance of losing or corrupting data. Pay close attention to warning messages.

Products

This documentation may refer to these products and product families:

- Oracle's PeopleSoft Application Designer
- Oracle's PeopleSoft Change Assistant
- Oracle's PeopleSoft Data Mover
- Oracle's PeopleSoft Process Scheduler
- Oracle's PeopleSoft Pure Internet Architecture
- Oracle's PeopleSoft Enterprise Customer Relationship Management
- Oracle's PeopleSoft Enterprise Financial Management
- Oracle's PeopleSoft Enterprise Human Resources Management Systems
- Oracle's PeopleSoft Enterprise Learning Management
- Oracle's PeopleSoft Enterprise Pay/Bill Management
- Oracle's PeopleSoft Enterprise PeopleTools
- Oracle's PeopleSoft Enterprise Performance Management
- Oracle's PeopleSoft Enterprise Portal Solutions
- Oracle's PeopleSoft Enterprise Staffing Front Office
- Oracle's PeopleSoft Enterprise Supply Chain Management

Note. This documentation refers to both Oracle's PeopleSoft Enterprise Portal Solutions and to PeopleSoft PeopleTools portal or portal technologies. PeopleSoft Portal Solutions is a separate application product. The PeopleSoft PeopleTools portal technologies consist of PeopleSoft Pure Internet Architecture and the PeopleSoft PeopleTools portal technology used for creating and managing portals.

See http://www.oracle.com/applications/peoplesoft-enterprise.html for a list of PeopleSoft Enterprise products.

Related Information

Oracle provides additional information that may help with your upgrade. The following information is available on My Oracle Support:

- *Release Notes.* Before you begin your upgrade, read the release notes 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 other portions of your system, such as your relational database management system (RDBMS) software or batch files.

 Go to My Oracle Support and search for the Release Notes for your product and release level.

- *Upgrade Documentation.* The upgrade documentation on My Oracle Support contains information posted after shipment of this release that may not be included in these upgrade instructions. Always check My Oracle Support for the most current documentation and information.

 Important! Before upgrading, it is imperative that you check My Oracle Support for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

 To find updates to the upgrade documentation, go to My Oracle Support and search for the upgrade documentation for your product and release level.

- *Getting Started on Your PeopleSoft Upgrade.* Before beginning a PeopleSoft upgrade, you must complete the tasks in the document *Getting Started on Your PeopleSoft Upgrade*. This document guides you through planning your upgrade as well as installing the software necessary to upgrade to the new PeopleSoft product release. If you did not complete the tasks in this documentation, do so now.

 Go to My Oracle Support and search for *Getting Started on Your PeopleSoft Upgrade*.

Comments and Suggestions

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

PSOFT-Infodev_US@oracle.com

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

CHAPTER 1

Installing the Software

This chapter discusses:

- Understanding Software Installation
- Installing the New Release
- Applying PeopleTools Patches
- Installing Change Assistant
- Retrieving and Applying Upgrade Files
- 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 begin the upgrade.

Task 1-1: Installing the New Release

To upgrade your system:

1. Install Oracle's PeopleSoft Enterprise Financial Management Solutions (FMS) 9.1 codeline and System database.

2. Download the PeopleSoft Enterprise PeopleTools installation guide for your platform.

   See My Oracle Support, select the Knowledge tab, then PeopleSoft Enterprise. Select Tools and Technology, then select the Enterprise PeopleTools Installation guide for your new release.

3. Download the application-specific addenda for the product line you are installing.

   See My Oracle Support, select the Knowledge tab, then PeopleSoft Enterprise. Select your product, then select the Enterprise PeopleTools Installation guide for your new release.

4. 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.

Note. 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.

Properties

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

Task 1-2: Applying PeopleTools Patches

In this task, you will download and apply PeopleSoft PeopleTools Required for Upgrade patches from Patches & Updates on My Oracle Support.

Important! Because the release of an upgrade is often intimately tied to a PeopleSoft PeopleTools patch release, complete this step only after the complete upgrade for your product is released on My Oracle Support. The certified upgrade path for your product will indicate the *minimum* PeopleSoft PeopleTools release and patch level that is required for your upgrade. Make note of this minimum PeopleSoft PeopleTools release and patch level.

However, it is recommended that you take the most updated version of PeopleSoft PeopleTools as long as your minimum release is included to ensure that your have the most updated PeopleSoft PeopleTools.

Applying PeopleSoft PeopleTools patches will bring you completely up to date with any changes made to PeopleSoft PeopleTools that affect the upgrade process. These PeopleSoft PeopleTools patches should only be applied to your source database at the beginning or end of an upgrade pass. If you apply a PeopleSoft PeopleTools patch at the beginning of the upgrade pass to your source database, the changes will automatically be migrated to the target database. You can apply PeopleSoft PeopleTools patches to the target database at the end of an upgrade pass if the patches were not applied to the source database in the beginning of the upgrade.

To apply all PeopleSoft PeopleTools Required for Upgrade patches:

1. Go to the patch fix search page on My Oracle Support.

    See My Oracle Support, Patches & Updates.

2. Select the following search criteria:

    • Select the PeopleSoft tab.

    • Select the Required for Install or Upgrade hyperlink.

    • Select *PeopleTools* from the Product Line drop down menu.

    • Select *PeopleTools* from the Product drop down menu.

    • Select your new PeopleTools release from the Release drop down menu.

    • The Required for Upgrade option

3. Click the right pointing arrow to execute the search.

4. Select the update ID for desired PeopleSoft PeopleTools patch.

Note. Rather than taking the minimum patch level suggested on the product upgrade page, it is recommended that you take the latest PeopleSoft PeopleTools patch so that you are completely up to date with all PeopleSoft PeopleTools updates.

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5. Click the *User Doc* link to read the patch documentation on how to download and apply the patch.

6. Download and install the PeopleSoft PeopleTools patch.

Properties

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

Task 1-3: Installing Change Assistant

As part of the PeopleSoft PeopleTools installation and/or the application of the PeopleSoft PeopleTools patch, PeopleSoft Change Assistant has been installed.

Enterprise PeopleTools PeopleBook: Change Assistant documentation is delivered with your software. You can also access this documentation through your upgrade page on My Oracle Support.

See My Oracle Support, Knowledge tab, PeopleSoft Enterprise.

Properties

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

Task 1-4: Retrieving and Applying Upgrade Files

This section discusses:

• Understanding Upgrade Files

• Applying Baseline Upgrade Files

• Applying Required for Upgrade Fixes

Understanding Upgrade Files

In this task, you will download and apply all files and objects from the upgrade page on My Oracle Support. In addition, you will download all Required for Upgrade fixes from Patches & Updates on My Oracle Support. This will bring you completely up to date with all upgrade objects and any changes made to the upgrade process or conversion code.

Note. You cannot continue with this task until the upgrade documentation for your product is released on My Oracle Support. Once the upgrade scripts and templates and upgrade documentation are available, complete the remaining tasks in this chapter before beginning the actual upgrade.

This step is just one of the steps in an upgrade in which you can apply Required for Upgrade fixes. There are other places in the upgrade process where applying updates may be applicable as well. How you apply the updates varies depending on where you are in the upgrade. The high-level view of where, when, and how to apply Required for Upgrade fixes is discussed in your product-specific upgrade guide.

See Appendix: "Applying Fixes Required for Upgrade" in your product-specific upgrade guide.

Task 1-4-1: Applying Baseline Upgrade Files

At Upgrade General Availability (UGA), upgrade templates and upgrade documentation are available on the upgrade page on My Oracle Support. Review the page and download the necessary files for your upgrade.

The baseline upgrade conversion scripts that you will need to perform the upgrade are available as a Required for Upgrade resolution on My Oracle Support. It is the prerequisite to all other Required for Upgrade resolutions.

See Applying Required for Upgrade Fixes

Properties

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

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

Additional Required for Upgrade fixes can be found on My Oracle Support. There are two ways you can search for these fixes—either through Patches & Updates on My Oracle Support or by using the Update Gateway through PeopleSoft Change Assistant. You can select the approach most comfortable for you

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Important! You should apply all listed fixes. If you do not apply all fixes, you may be introducing an error into your upgrade. 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. There may be interdependencies between the upgrade programs for various paths, and if you do not apply all fixes you may introduce errors.

To apply Required for Upgrade fixes from Patches & Updates on My Oracle Support:

1. Go to the Patches & Updates tab on My Oracle Support.

    See My Oracle Support (Patches & Updates, PeopleSoft, Required for Install or Upgrade).

2. Select the Required for Install or Upgrade hyperlink.

3. Select the following search criteria:

    • Product Line: Your PeopleSoft Enterprise product line.

    • Product: Upgrade.

    • Release: Your new product release.

    • The Required for Upgrade option.

4. Click the right pointing arrow to execute the search.

5. Note the update ID (or IDs) for any Required for Upgrade fixes.

6. Download the noted fixes using the "download change package" functionality in PeopleSoft Change Assistant (Tools, Download Change Packages).

7. Before applying each fix, review the documentation included with the fix.

    There may be manual steps that need to be performed to successfully apply the fix.

8. Use PeopleSoft Change Assistant to apply the fixes to your Demo database.

    See Enterprise PeopleTools PeopleBook: Change Assistant, for your current release, "Using Change Assistant For Software Updates."

To apply Required for Upgrade fixes using Update Gateway:

1. In Change Assistant, select Tools, Go To Metalink.

2. Select the "Find updates not yet installed" option.

3. Click Next.

4. Click Manually Enter Environment Information.

5. Enter the following search criteria:

    • Product Line: Your PeopleSoft Enterprise product line.

    • Release: Your new product release.

6. Click Next.

7. Select the products that are applicable to your installation.

8. Click Next.

9. Select the "Required to complete upgrade" option under Update Type.

    Ensure that the "Include prerequisites and post-requisites" check box is selected.

10. Click Next.

11. On this page, you can exclude any listed update IDs that you may have already installed.

12. Once the list appears correct, click Next to download the list of update IDs to an Excel spreadsheet.

13. Download the noted fixes using the "download change package" functionality in PeopleSoft Change Assistant (Tools, Download Change Packages).

14. Before applying each fix, review the documentation included with the fix.

    There may be manual steps that need to be performed to successfully apply the fix.

15. Use PeopleSoft Change Assistant to apply the fixes to your Demo database.

    See Enterprise PeopleTools PeopleBook: PeopleSoft Software Updates for your current release, "Applying Updates."

Warning! DO NOT INSTALL ANY APPLICATION FIXES, BUNDLES, OR MAINTENANCE PACKS AT THIS TIME! The only fixes you can apply at this time are Required for Installation, Required for Upgrade, and any other fixes from the Upgrade home page. Installing other application fixes during the upgrade process can break data conversion and other scripts for the upgrade. This includes installing fixes to the Demo database used as your Source database during the upgrade, as well as any upgraded Copy of Production database you use during your Move to Production test passes. Application fixes, bundles, and maintenance packs can be applied after the upgrade is complete.

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 PeopleSoft Change Assistant, you need to configure PeopleSoft Change Assistant as well as an upgrade job.

Launch PeopleSoft Change Assistant and perform the following steps:

1. Configure the PeopleSoft Change Assistant options:

    a. Select Tools, Options.

    b. On the Change Assistant tab, select the Perform Application Upgrade mode.

    c. Check the Enable Server Processing check box if you will be using PeopleSoft Change Assistant to run processes on a separate host server.

    d. Fill in the rest of the information on this tab and all other active tabs.

    e. Click OK when finished.

    See *PeopleSoft Enterprise PeopleTools: Change Assistant.*

2. Import the upgrade template contained within the UpgradeTemplates.exe file.

    a. Select File, Import Template.

    b. Select the template for your product and path.

    c. Click Import.

3. 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.

4. Set the documentation directory:

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

    a.   Select Edit, Set Documentation Directory.

    b.   Enter or browse to the directory containing the HTML documentation and click OK.

       See *PeopleSoft Enterprise PeopleTools Change Assistant* "Configuring Change Assistant for Upgrades."

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

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

    See *PeopleSoft Enterprise PeopleTools Change Assistant* "Configuring Change Assistant for Upgrades."

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

Properties box example

The Database Orientation has two possible description: 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 PeopleSoft FSCM 9.1 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 PeopleSoft 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 PeopleSoft 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 PeopleSoft Change Assistant job configuration.

Properties

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

CHAPTER 2

Planning Your Application Upgrade

This chapter discusses:

• Understanding Application Upgrade Planning

• Understanding Your Upgrade

• Copying Your Production Database

Understanding Application Upgrade Planning

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).

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 that you need to know before you begin your upgrade. It explains the different types of databases that you will use and provides useful upgrade tips and information that 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 *Getting Started on Your PeopleSoft Upgrade,* "Starting Your Upgrade." Verify that the following tasks are complete:

- Installing the new release.

- Applying PeopleSoft PeopleTools patches.

- Installing PeopleSoft Change Assistant.

- Retrieving and applying upgrade files.

- Creating and configuring an upgrade job.

- Setting Configuration Manager profile.

- Reviewing upgrade step properties.

Properties

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

Task 2-1-2: Defining Upgrade Databases

The following databases will be used during your upgrade:

- The New Release Demo database always refers to the database delivered with your new PeopleSoft release.

  It contains the new and changed database objects that you want to add. The New Release Demo database is also referred to as the Demo database later in the upgrade.

- The Copy of Production database refers to the copy of your production database, into which you will add the new and changed objects for this release from the New Release Demo database.

  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.

- The Copy of Current Demo refers to the copy of the demo database for the release that you are currently using.

Properties

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

- Budget Cycle

Upgrading in the middle of a budget cycle is not recommended, but it can be accomplished. If you want to upgrade in the middle of a budget cycle, you must take the following steps:

Re-create any run control records created prior to the upgrade for the Budgets Cube Import. This is due to the introduction of new ChartFields for ledger tables.

If the Position Budgeting feature is used, the position data will not be upgraded due to the extent of the architectural changes to the position tables. When the upgrade is complete, you will need to subscribe to the new position data (from HRMS or EPM/WFA) or if you do not have integration points, you will need to key in new position data via the Budgets product.

- Performance Recommendations

Before beginning your upgrade, you should plan for performance issues as outlined in the *Getting Started on Your PeopleSoft Upgrade* documentation.

- Expenses

Oracle's PeopleSoft Enterprise Expenses uses a new Approval and Workflow engine to manage expense transaction approvals. To prepare for upgrade, customers must ensure that all expense transactions are either in Pending status (unsubmitted) or in final approved status prior to the upgrade. Transactions that are in the approval process may not be recoverable for routing to approver queues after the upgrade. Once the upgrade is completed and the system is in production, transactions that are in Pending status may be submitted normally and transactions that are already approved may be staged for further processing as required.

- Microsoft SQL Server Column Statistics

As of Microsoft SQL Server 2000, user-defined statistics can be created on columns within a table. This feature is not supported by PeopleSoft 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. Oracle recommends that you drop all user-defined statistics on columns of PeopleSoft tables before proceeding with your upgrade.

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 Production Database

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

Make a copy of your production database. You will perform the upgrade on this Copy of Production database, not on your production database. Make sure that all current processes are completed and that no existing non-upgrade processes are queued or scheduled to run during the upgrade on the Copy of Production. Performing the 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. The first Copy of Production, or "old" Copy of Production, will now be the Source database (it was the Target database in the initial test pass). The second, or "new" Copy of Production, is now the Target database.

Properties

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

CHAPTER 3

Preparing Your Database for Upgrade

This chapter discusses:

- Understanding Database Preparation
- Applying Upgrade Planning Files
- Setting Up Front Office
- Exporting Front Office Data
- Performing General Options Setup
- Verifying the Upgrade User

Understanding Database Preparation

In this chapter, you begin preparations for 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 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 3-1: 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 page on My Oracle Support 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 3-1-1: 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 3-1-2: 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 3-1-3: 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 3-2: 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 3-2-1: Verifying Installation Options

In this step, verify that you selected the correct products when you installed your FSCM 9.1 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 3-2-2: Configuring PC Business Unit

As part of the upgrade to FSCM 9.1, all Staffing Front Office 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 8.8. Therefore, before you map your Staffing Front Office 8.8 Business Units, you must create those corresponding PC Business Units in FSCM 9.1.

Be sure to keep a record of the PC Business Unit values you enter for FSCM 9.1. You will enter those values to the Staffing Front Office 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 9.1 based on how you want to map your Staffing Front
    Office 8.8 Business Units later in the upgrade.

    See PeopleSoft Enterprise 9.1 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 3-2-3: Mapping Skill Type to Competency Type

The Front Office Skills tables used in Staffing Front Office 8.8 are replaced by the Competency Management and Resource Management Competency tables in FSCM 9.1. As part of the upgrade process, you have to manually translate your existing skill types from Staffing Front Office 8.8 to the skill types associated with FSCM 9.1 competencies.

The source skill type table in Staffing Front Office 8.8 has Skill Type (character length 6) as its key. The table, Competency Management, in FSCM 9.1, 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.

    The Skill Type to Skill Type page appears.
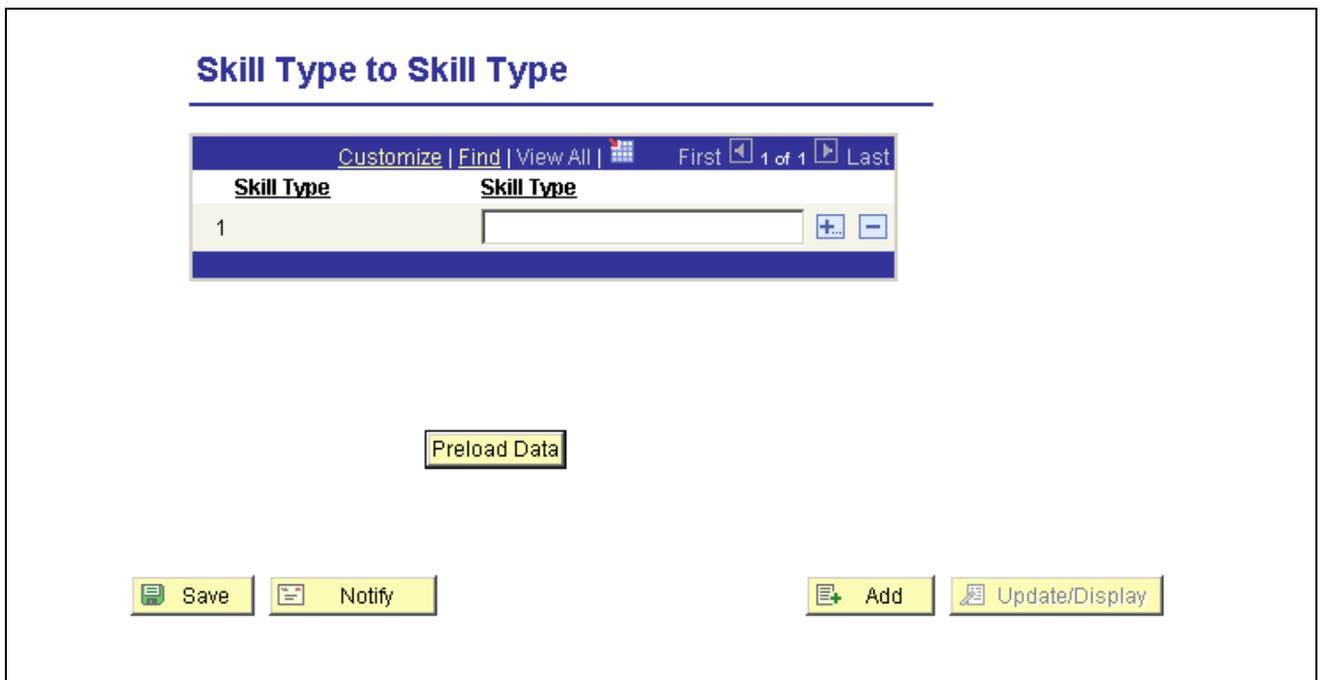
Skill Type to Skill Type page

2. Click the Preload Data button.

Once the Preload Data button is selected, the page will auto-populate with values, as shown in the example below. The Skill Type column on the left will populate with your Skill Type values from Staffing Front Office 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.
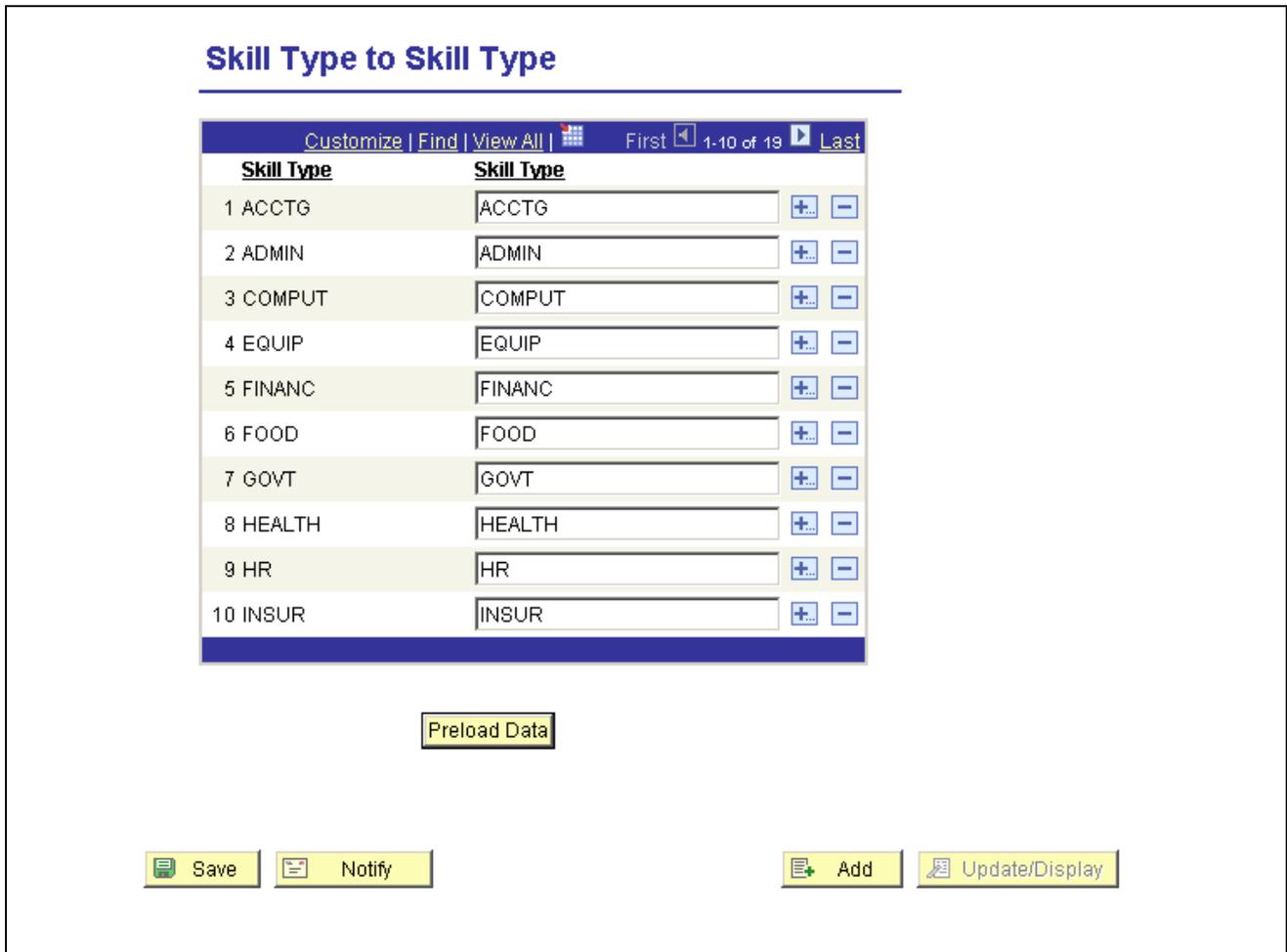
Skill Type to Skill Type page; Preloaded Data

3. Verify that the right hand column of Skill Type values (representing the values in FSCM 9.1) are unique.

    If you find a value that is a duplicate of a previous value, change the value to make it unique.

4. 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 3-2-4: Mapping Skill Code to Competency

The Skills tables used in PeopleSoft Staffing Front Office 8.8 have been replaced by Competency Management and Resource Management Competency Tables in PeopleSoft FSCM 9.1. As part of the upgrade, you must manually translate your skill codes from Staffing Front Office 8.8 to competencies in FSCM 9.1.

The Skill Code table in PeopleSoft Staffing Front Office 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 9.1 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 8.8. Even if the values of Skill Code are distinct in Staffing Front Office 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.

    The Skill Code to Competency page appears.
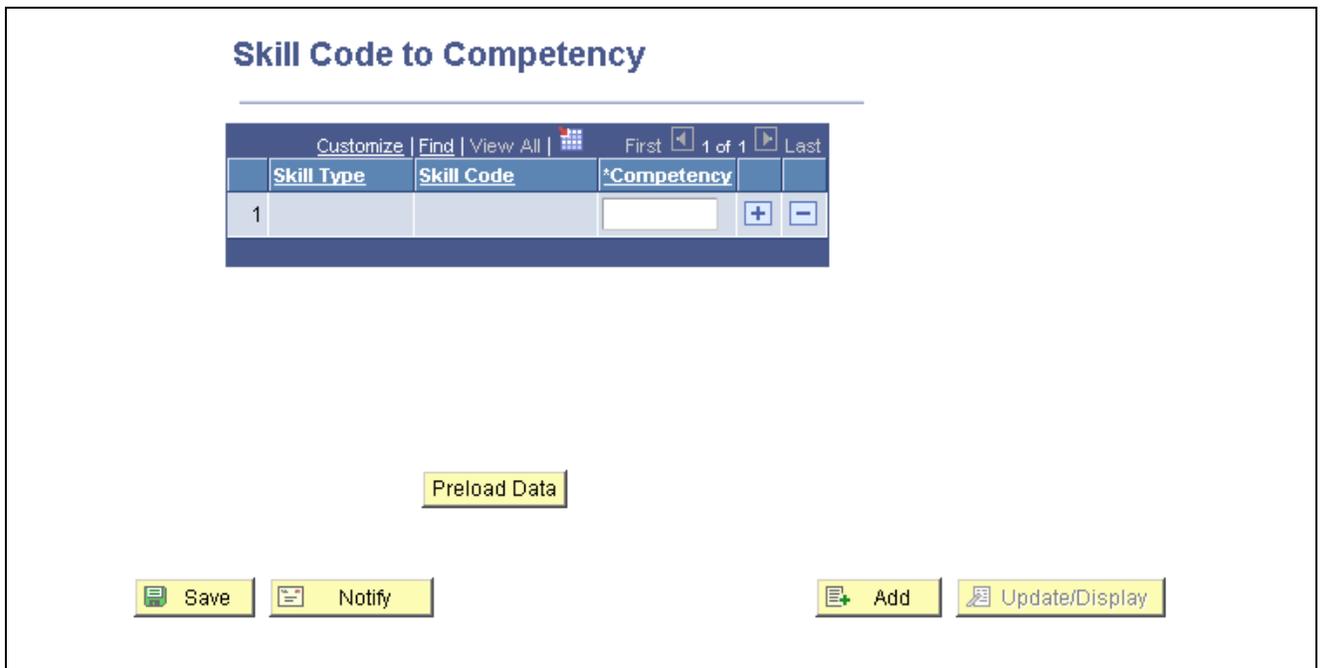
Skill Code to Competency page

2. Click the Preload Data button.

The Skill Type and Skill Code columns will populate with values from your Staffing Front Office 8.8 Skill Type-Skill Code combination, as shown in the example below. The Competency column will populate with the auto-generated values, representing FSCM 9.1 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 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 3-2-5: Mapping Resource and Order Priority Values

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

• Applicants/Employees

• Orders

- Customers

The priority table in PeopleSoft Staffing Front Office 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 9.1 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 8.8.

- User Status "Employees" will be upgraded to Resource Priority table in FSCM 9.1.

- User Status "Orders" will be upgraded to the Order Priority table in FSCM 9.1.

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 User Status to Priority Code page appears.

User Status to Priority Code page

2. Click 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.

4. 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 3-2-6: Mapping Business Unit to Location Code

Front Office Business Units have been replaced by Staffing Branches in FSCM 9.1. Sometimes, in Staffing Front Office 8.8 Business Units were referred to as Staffing Branches. However, they were still Business Units by definition. In FSCM 9.1, Front Office Business Units are treated and referred to only as Staffing Branches.

In FSCM 9.1, 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 8.8 before the Front Office Business Units are upgraded to Staffing Branches.

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

1. Select Set Up Staffing, Payroll, Locations.

    Make note of these Location Codes; you will need them later in your upgrade.

2. Select Set Up Staffing, Upgrade, FO Business Unit to Branch.

    The FO Business Unit To PC Business Unit & Location Code page appears.
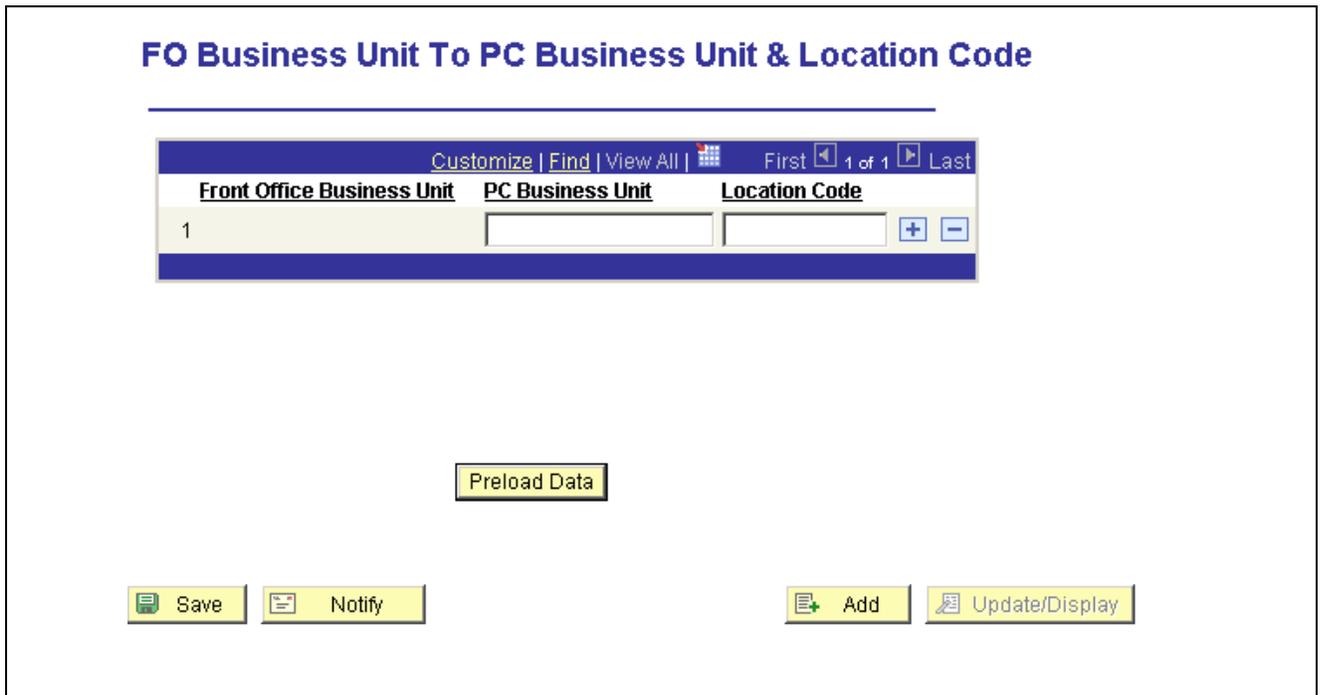
FO Business Unit to PC Business Unit & Location Code page

3. 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 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 9.1, regardless of if they have a Location Code mapped. Later in the upgrade you can add or change the Location Codes.

   See "Applying 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 3-2-7: Mapping Test to Accomplishment

Tests in Staffing Front Office 8.8 are being replaced by Accomplishments in FSCM 9.1. 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 9.1 table. If this is your situation, you must resolve the Staffing Front Office 8.8 values and the FSCM 9.1 values so that the FSCM values do not get overwritten. You must add new accomplishment values to FSCM 9.1 from Staffing Front Office 8.8 Test values, or you must map the existing Test values from Staffing Front Office 8.8 to Accomplishment values in FSCM 9.1.

If you do not use Competency Management tables in your FSCM database, you will upgrade your Test values from Staffing Front Office 8.8 to Accomplishment values in FSCM 9.1.

To map Test values to Accomplishments:

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

    The Test To Accomplishment page appears.
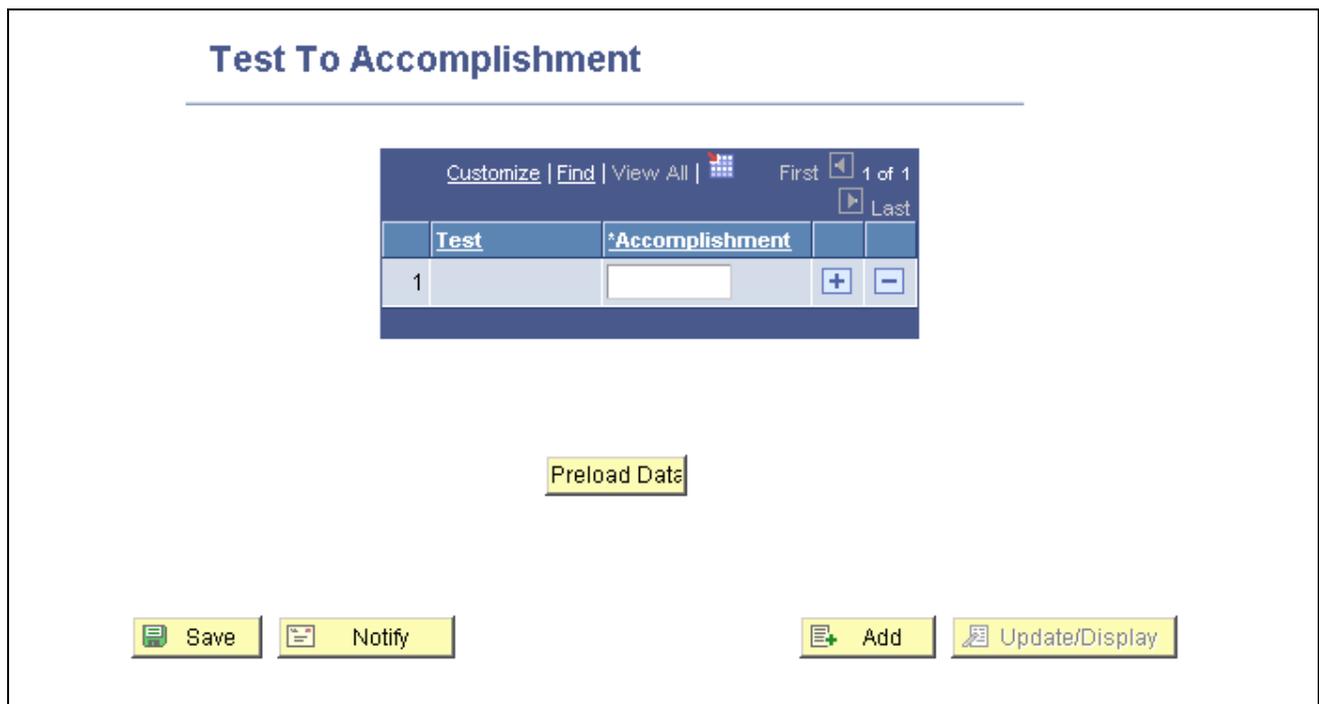
Test to Accomplishment page

2. Click the Preload Data button.

    This populates the Test column on the Test to Accomplishment page with your existing Test Code values from Staffing Front Office 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 8.8 already exist in the report. There are three possible scenarios you may encounter:

   • The Staffing Front Office 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 8.8 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 8.8 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 8.8) 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 8.8.

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 3-2-8: Mapping Degree to Accomplishment

Degrees in Staffing Front Office 8.8 are replaced by Accomplishments in FSCM 9.1.

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 9.1 table. If this is your situation, you must resolve the Staffing Front Office 8.8 and FSCM 9.1 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 8.8 Degree values or you must map the existing Degree values from Staffing Front Office 8.8 to Accomplishment values in FSCM 9.1.

If you do not use Competency Management tables in FSCM, you will upgrade your Staffing Front Office 8.8 Degree values to Accomplishment values in FSCM 9.1.

To map Degree values to Accomplishment values:

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

2. Click the Preload Data button.

   This will populate the Degree column with your existing Degrees in Staffing Front Office 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 9.1.

   _____

   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 8.8 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 8.8 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 9.1. 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 8.8 and BL refers to Bachelor of Science-Law in your report (FSCM 9.1). 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 3-2-9: Mapping Major Code

As part of the upgrade, Staffing Front Office 8.8 Major Code values will be upgraded to Major Code values in FSCM 9.1.

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 8.8 are already present in the new FSCM table. If this is the case, you must resolve the Staffing Front Office 8.8 and FSCM values so that the FSCM 9.1 values do not get overwritten. You will either add Major Code values to FSCM 9.1 from Staffing Front Office 8.8 values or map the existing Major Code values in Staffing Front Office 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 8.8 to Major Code values in FSCM 9.1.

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

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

    The Major Code to Major code page appears.
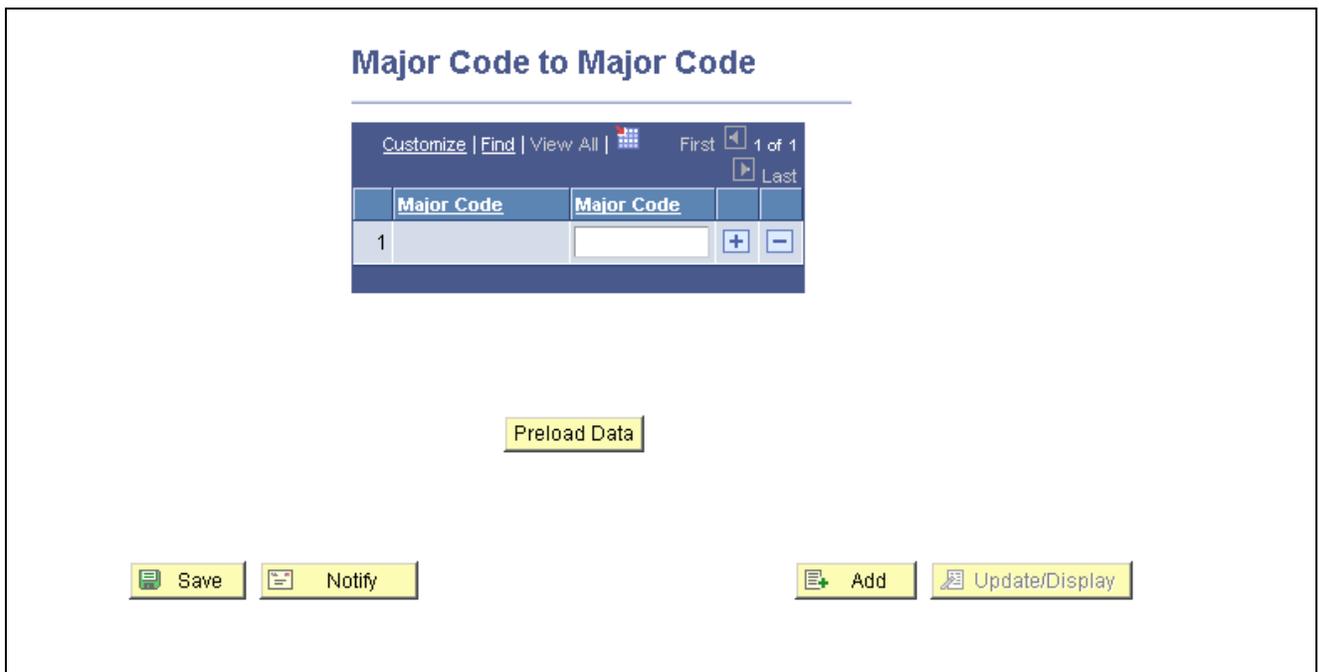
Major Code to Major Code page

2. Click the Preload Data button.

    This will populate the Major Code column (left column) with your Staffing Front Office 8.8 values. The right hand Major Code column is populated with auto-generated values that map to FSCM 9.1.

    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 8.8 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 8.8 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 8.8 and in FSCM 9.1) 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 8.8 Major Code value maps to a new unique Major Code value in FSCM 9.1.

For example, K000010 refers to Anthropology in Staffing Front Office 8.8 and K000010 refers to Business Administration in FSCM 9.1. In this example, the page would display K000010 in the left hand Major Code column (Staffing Front Office 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 9.1.

• If the Staffing Front Office 8.8 Major Code value is not present in the report but there is a Major Code value in Staffing Front Office 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 8.8 value maps to the correct FSCM Major Code value.

For example, K000008 refers to French in Staffing Front Office 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 3-2-10: Mapping School Code

As part of the upgrade, Schools in Staffing Front Office 8.8 are upgraded to Schools in FSCM 9.1. The School table in Staffing Front Office 8.8 has a two-element key made up of School Code and Country. The School table in FSCM 9.1 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 9.1 table. If this is the case, you must resolve the Staffing Front Office 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 8.8 or you map the existing Staffing Front Office 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 8.8 to School values in FSCM 9.1.

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

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

   The School Code to School Code page appears.
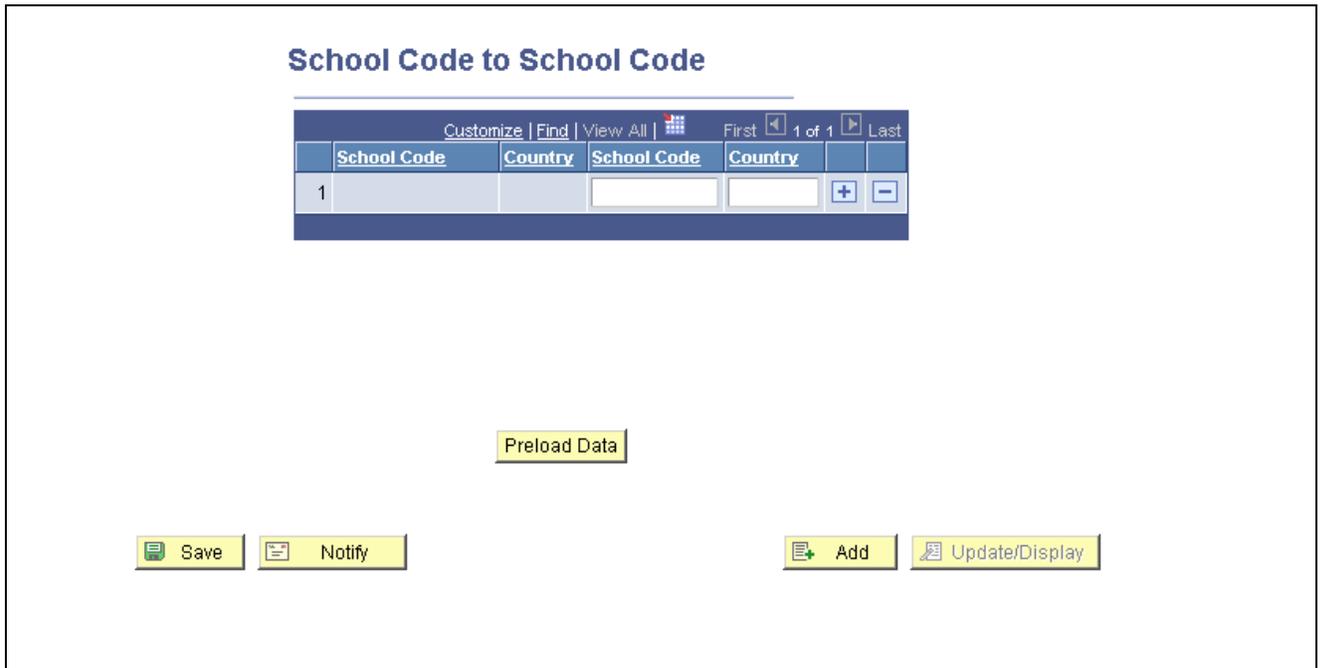
School Code to School Code page

2. Click 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 8.8 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 9.1.

   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 8.8 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 8.8 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 8.8 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 8.8 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 8.8 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 8.8 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 3-2-11: Printing Translate Values for NAME PREFIX

The NAME_PREFIX field translate values used in your previous Staffing Front Office 8.8 release will be replaced by the prompt values of the Salutation Codes table in FSCM 9.1.

You must manually enter all of your "old" (Staffing Front Office 8.8) NAME_PREFIX translate values into the setup component of Salutation Codes in FSCM 9.1, 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 8.8 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 3-2-12: Printing Translate Values for SCHOOL TYPE

The SCHOOL_TYPE field translate values used in Staffing Front Office 8.8 are replaced by the prompt values of the School Type table in FSCM 9.1.

You must manually enter all of your "old" (Staffing Front Office 8.8) translate values from the field SCHOOL_TYPE into the set up component of School Type in FSCM 9.1 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 3-3: 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 8.8 database. Later in the upgrade you will import this data into your FSCM 9.1 database.

Task 3-3-1: Updating Configuration Manager Profile

The Configuration Manager default profile needs to be updated to use values for your new release PS_HOME. PeopleSoft 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.
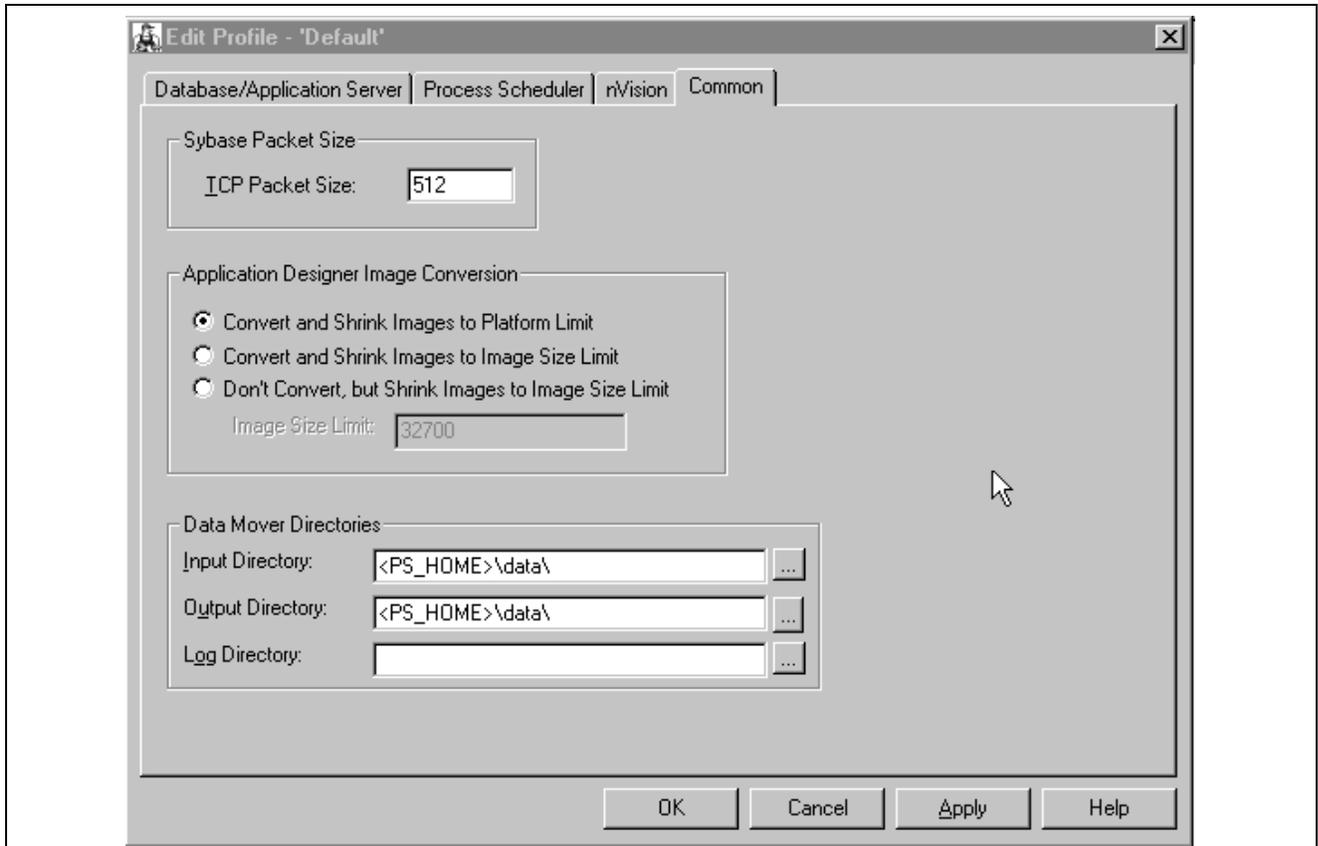
Edit Profile - Default dialog box

> **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.

   PeopleSoft Change Assistant will use these to launch SQR.

Properties

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

Task 3-3-2: Exporting Front Office NonStable Tables

In this step you will export the non-stable Staffing Front Office tables from your Staffing Front Office 8.8 database. This data will later be imported into your FSCM 9.1 database.

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

The script for your upgrade is:

```
PUFOFOR25E.DMS
```

Properties

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

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

In this step you will export your Staffing Front Office Stable tables from your Staffing Front Office 8.8 database. This data will be imported into your FSCM 9.1 database later in the upgrade.

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

The script for your upgrade is:

```
PUFOFOR26E.DMS
```

Properties

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

Task 3-4: Performing General Options Setup

This section discusses:

• Populating UPG_CONV_TBL Table

Task 3-4-1: Populating UPG_CONV_TBL Table

This step runs an import script against your FSCM 9.1 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.

The script for your upgrade is:

```
DLFOFOR33.DMS
```

Properties

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

Task 3-5: Verifying the Upgrade User

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

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

To grant your upgrade user PeopleSoft administrator privileges:

1. From the browser, select PeopleTools, Security, User Profiles, User Profiles.

2. Select the user ID for your upgrade user.

3. Select the Roles tab.

4. Add the role *PeopleSoft Administrator* if it is not already granted to your upgrade user.

5. Save the user profile.

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

Properties

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

CHAPTER 4

Applying Application Changes

This chapter discusses:

- Understanding Application Changes
- Importing Front Office Data
- Preparing for Data Conversion Analysis
- 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 4-1: Importing Front Office Data

This section discusses:

- Understanding Front Office Data Import
- 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 9.1 database.

Task 4-1-1: Importing Front Office NonStable Tables

In this step you import the Staffing Front Office 8.8 non-stable tables you exported earlier in the upgrade, into your FSCM 9.1 database.

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 4-1-2: Importing Front Office Stable Tables

In this step you import the Staffing Front Office 8.8 stable tables you exported earlier in the upgrade, into your FSCM 9.1 database.

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 4-1-3: 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 8.8 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 4-1-4: 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 8.8 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 4-2: Preparing for Data Conversion Analysis

This section discusses:

• Populating Alter Analyzer Repository

• Building the EOUF_UPGRADE_FRAMEWORK Project

• Running the EOUF_UPGRADE_FRAMEWORK Script

Task 4-2-1: Populating Alter Analyzer Repository

This task runs the PTALTANLYZR Application Engine program. This program determines how the database structure is different between your current release and the new release.

Properties

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

Task 4-2-2: Building the EOUF_UPGRADE_FRAMEWORK Project

This step generates the SQL script to create and alter tables and views delivered in the EOUF_UPGRADE_FRAMEWORK project. The tables are altered to add new columns, rename existing columns, change columns that have modified properties, and delete columns. The script re-creates views and modified indexes. New indexes are also created.

The script for your upgrade path is:

```
EOUF_UPGRADE_FRAMEWORK.SQL
```

Properties

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

Task 4-2-3: Running the EOUF_UPGRADE_FRAMEWORK Script

This step runs the script generated in the previous step.

Properties

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

Task 4-3: Modifying the Database Structure

This section discusses:

• Building the Upgrade Tables Script

• Re-Creating Upgrade Tables

• Creating Upgrade Views

Task 4-3-1: 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 4-3-2: Re-Creating 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 4-3-3: 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 4-4: Loading Data for Data Conversion

This section discusses:

• Running Required for Upgrade Data

• Updating the Installation Option

Task 4-4-1: Running Required for Upgrade Data

This step imports the Data Conversion Driver table. The script and .dat file are located on the upgrade page in My Oracle Support. 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 4-4-2: 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 4-5: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your System database. Now you should check My Oracle Support again for any new postings, and apply them now.

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 PeopleSoft Change Assistant.

2. Use PeopleSoft 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 Change Assistant for your current release.

3. Migrate the Change Packages into the Target database for this upgrade pass. If needed, first set up PeopleSoft 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 4-6: Configuring Scheduler and Server

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."

Properties

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

Task 4-7: 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 4-8: Running Data Conversion for Front Office

In this task you run data conversion on your Staffing Front Office data that you imported into your FSCM 9.1 database, using Application Engine UPG_DATCONV.

Properties

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

Task 4-9: 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 4-10: 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 4-11: Running the Final Audit Reports

This section discusses:

• Running the Final DDDAUDIT Report

• Running the Final SYSAUDIT Report

• Creating the FNLALTAUD Project

• Running the Final Alter Audit

• Reviewing the Final Audits

• Running the Final SETINDEX Report

• Running the Final SETTABLE Report

Task 4-11-1: Running the Final DDDAUDIT Report

DDDAUDIT is an SQR that compares your production SQL data tables with the PeopleSoft 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 4-11-2: Running 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 4-11-3: Creating 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 4-11-4: Running the Final Alter Audit

Run the PeopleSoft PeopleTools alter record process on all tables in your system to check whether the PeopleSoft PeopleTools definitions are synchronized with the underlying SQL data tables in your database. This process is called an Alter Audit. An Alter Audit compares the data structures of your database tables with the PeopleSoft PeopleTools definitions to uncover inconsistencies. The Alter Audit then creates an SQL script with the DDL changes needed to synchronize your database with the PeopleSoft 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 4-11-5: Reviewing the Final Audits

The Alter Audit process creates SQL scripts that correct any discrepancies between your PeopleSoft 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/NT platforms, if your database has tables containing the MSSCONCATCOL or DBXCONCATCOL column, you will see SQL alter the tables and re-create their associated indexes, even though the underlying tables and indexes may not have changed.

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 PeopleSoft Application Designer are not automatically deleted from the system tables. Oracle 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.

Similarly, your SYSAUDIT report may have some errors due to references to obsolete PeopleSoft-owned objects. Invalid references are not automatically cleaned up during the upgrade in case you have customizations that you want to modify. For instance, if a PeopleSoft Permission List is deleted, and you have a Role that still refers to that Permission List, 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 4-11-6: Running the Final SETINDEX Report

The SETINDEX SQR updates index overrides stored in the PSIDXDDLPARM 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 4-11-7: Running the Final SETTABLE Report

The SETTABLE SQR updates table overrides stored in the PSRECDDLPARM 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 4-12: Configuring the Upgrade Environment

This section discusses:

• Configuring the Web Server

• Configuring Portal

Task 4-12-1: Configuring the Web Server

Running Portal requires a fully functional web server. In this step, configure your web server. Make sure that you also configure your web server for PeopleSoft Enterprise PeopleBooks so that you can easily refer to the documentation while reviewing the new release.

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

Properties

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

Task 4-12-2: Configuring Portal

Running Portal requires a fully functional application server domain. The application server was configured earlier in the upgrade. PeopleSoft applications are accessed through the Portal. You need to grant users access to complete the upgrade process. You must install and configure the PeopleSoft 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 sign-on 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 4-13: 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 9.1 database.

In the new release for Front Office standalone customers, a new Staffing installation option, *Allow Reactivate Closed Assign* will be automatically selected during the upgrade. This option enables users with the appropriate permissions to reactivate previously closed assignments. You do not need to perform any action to access this functionality.

Task 4-13-1: 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 9.1.

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 9.1. 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 8.8) 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 8.8 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 4-13-2: 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 8.8 are replaced by the prompt values of the Salutation Codes table in Staffing Front Office in FSCM 9.1. You must manually configure the Salutation Codes component so that the prompt tables contain all the translate values from your previous NAME_PREFX field in Staffing Front Office 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 8.8.

5. In the Short Description field, enter the short name of the translate value as it is in Staffing Front Office 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 4-13-3: 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 4-14: Reconfiguring Security

The security model used in your previous Staffing Front Office database, has changed considerably for FSCM 9.1 due to the merge of Staffing Front Office 8.8 into FSCM 9.1. Therefore, after data conversion, you are required to set up operators, roles, permission lists, and department security tables among other components in the FSCM 9.1 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 9.1.

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 4-15: 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.

Properties

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

Task 4-16: 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 Getting Started on Your PeopleSoft Upgrade, Appendix: "Planning for Upgrade Testing."

Properties

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

CHAPTER 5

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. On My Oracle Support, check the upgrade page and the patches and updates 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 My Oracle Support 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 My Oracle Support's patches and updates page 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 that you previously applied.

    Then check patches and updates 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, "Starting Your Upgrade," in *Getting Started on Your PeopleSoft Upgrade,* you should first download and apply all files and objects from the upgrade page on My Oracle Support. Then you must download all Required for Upgrade fixes from the patches and updates page on My Oracle Support. 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 PeopleSoft Change Assistant.

2. Use PeopleSoft Change Assistant to apply the updates into your New Release Demo database.

    Review the documentation included with each update prior to applying each update. You may need to perform manual steps to successfully apply the update.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant 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 "Running and Reviewing Compare Reports" and "Applying 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 "Completing Database Changes" chapter. It is, therefore, best to wait until just before the "Running Data Conversion" task in the "Applying 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 PeopleSoft Change Assistant.

2. Use PeopleSoft 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 Change Assistant 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 PeopleSoft 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 Change Assistant for your current release, "Applying Updates."

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

   If needed, first set up PeopleSoft 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, Applying 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 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 "Applying 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 PeopleSoft 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

Upgrading Front Office and PayBill

Task B-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 9.1 database. Your Staffing Front Office objects will be part of the product, Staffing Front Office in FSCM 9.1, 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 C

Using Data Conversion Utilities

This appendix discusses:

• Understanding Data Conversion Utilities

• Using the UPGDATACONV Process

• Using the EO Upgrade Framework Process

• Using the Upgrade Driver Program

• Using the Upgrade Drivers Page

Understanding Data Conversion Utilities

The Upgrade Data Conversion Application Engine Programs are organized into a series of Drivers or Groups which guide the flow and order of execution at runtime for a particular upgrade path. This appendix contains information regarding the Application Engine program UPG_DATACONV and the PS_UPG_DATACONV table.

This appendix also contains information regarding the EO Upgrade Framework, which consists of two Application Engine programs and is intended to optimize the data conversion process by analyzing Source and Target tables, column usage, state records, and bind variables in order to determine actual dependencies between application engine sections. This allows you to run your data conversion process during your PeopleSoft application upgrade with optimal performance.

Task C-1: Using the UPGDATACONV Process

This section discusses:

• Understanding the UPGDATACONV Process

• Reviewing the Data Conversion Report

Understanding the UPGDATACONV Process

To run all PRE and POST data conversions, Oracle has provided the Application Engine program UPG_DATACONV. This program runs the Application Engine sections defined in the table PS_UPG_DATACONV.

Task C-1-1: Reviewing the Data Conversion Report

Each of the upgrade data conversion sections contains comments that describe the processing performed by the section. Oracle 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 UDATACNV.

To run UDATACNV:

1. Using SQRW, run SQR UDATACNV on your Copy of Production database.

2. When prompted for upgrade path, enter:

    ```
    FO8X
    F881
    ```

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.

Task C-2: Using the EO Upgrade Framework Process

This section discusses:

• Understanding the EO Upgrade Framework Process

• Reviewing EO Upgrade Framework Initial Analysis

• Reviewing Dependency Analysis

• Reviewing Runtime for EOUFDATACONV

• Reviewing EO Upgrade Framework Reporting

Task C-2-1: Understanding the EO Upgrade Framework Process

The EO Upgrade Framework process includes analyzing the insert, update, and delete SQL steps in your data conversion to determine the Source and Target tables, column usage, stat records, and bind variables that are used. This includes analyzing dynamic SQL, App Classes, SQLExec's, and platform-specific code.

The AE program gathers a list of AE sections required for data conversion from a given upgrade path. These sections are analyzed and SQL statements are extracted and stored in the AE Analyzer repository. Each SQL statement is analyzed to derive a list of tables that are manipulated or queried during the execution of that SQL. Once all the SQL is analyzed, the information is used to derive section dependency information which is then saved in the AE Analyzer repository.

There are two types of analysis for EO Upgrade Framework: initial and dependency. This section will describe both analysis types in detail.

Task C-2-2: Reviewing EO Upgrade Framework Initial Analysis

This section discusses:

• Understanding Initial Analysis

• Reviewing Custom Data Conversion Code

• Reviewing Table Usage Information

- Reviewing Invalid SQL

- Reviewing the Data Conversion Repositories

Understanding Initial Analysis

The EOUFANALYSIS Application Engine reads the data conversion code for your defined upgrade path (where the path is defined in the UPGDATACONV table with UPG_CONV_TYPE= "MAIN").

The AE Analyzer program leverages two PeopleCode functions included with PeopleSoft PeopleTools 8.50 or higher. The two PeopleCode functions are:

- GetProgText: A function that retrieves a PeopleCode program as text.

- ResolveMetaSQL: A function that returns a string of SQL text that has had its metasql resolved.

Reviewing Custom Data Conversion Code

Custom data conversion code can be included in the Initial Analysis and subsequent steps in the EO Upgrade Framework by adding a row (or rows) to the PS_UPG_DATACONV table for each custom AE section that is to be executed, where a row is defined as UPG_PATH, UPG_GROUP_SEQ_NUM, SEQ_NUM, AE_APPLID, AE_SECTION, ACTIVE_FLAG, UPG_CONV_TYPE.

Reviewing Table Usage Information

The data conversion analysis process attempts not only to identify the tables that are used in a given Application Engine step, but also how the tables are being used in the context of each step.

This information is stored in the analysis tables and documented in the Table Usage and Action columns of delivered EOUF reports, such as EOUF0001.SQR.

Valid values for the Table Usage column are:

- "S" for Data Source

- "T" for Data Target

- "X" for Unknown

Note. An "X" Usage for the PS_EOUF_DUAL, PS_EOUF_COMMON_AET, PS_EOUF_DUMMY and/or PS_EOUF_NORECNAME tables is expected and does not impact the subsequent Dependency Analysis Process.

See Reviewing Dependency Analysis

Valid Values for the Action column are:

- CREATE

- DELETE

- DROP

- INSERT

- SELECT

- TRUNCATE

- UPDATE

- UPDSTATS

- UNKNOWN

- OTHER

A valid value for the action "Unknown" is only applicable to PeopleCode steps and only occurs in instances when the parser encounters syntax such as `getrecord`,`getrowset`, `createrecord`,or `createrowset` and cannot determine what actions were being done against the variable.

A valid value for the action "Other" occurs in instances when the parser encounters syntax such as the "Invalid SQL Override" or other non-SQL statements such as application function calls.

See Reviewing Invalid SQL

Reviewing Invalid SQL

The data conversion analysis process may mark certain SQL statements as invalid. This designation refers to SQL statements that the AE Analysis process could not correctly process. When a SQL statement is marked invalid there are three options that you can use.

- Modify the SQL so that the AE Analyzer can process the statement. The following table compares sample invalid and valid SQL statements:

Invalid SQL	Valid SQL
UPDATE %Table(%BIND(RECNAME)) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D')	• UPDATE %TABLE(BN_834_MEMBER) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D') • UPDATE %TABLE(DEP_BEN_EFF) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D') • UPDATE %Table(EMERGENCY_CNTCT) SET RELATIONSHIP = 'C' WHERE RELATIONSHIP IN ('S', 'D')

- For invalid SQL statements in PeopleCode, add an override line directly above the invalid SQL to manually document the Source and Target tables that are in use.

Note. There is no "override" option for Application Engine SQL steps that are marked as invalid.

Note. Entering inaccurate or incomplete information in the override statement may result in data conversion sections being run in the incorrect dependent order, which can produce incorrect conversion results such as data errors.

Note. Tables defined in the override statement require the "PS_" prefix.

Correct = PS_JOB

Incorrect = JOB

The following table gives sample override lines for various situations:

Syntax	Sample Override Lines
When Source and Target tables are explicitly known and static	For example: • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:<SRC Table>,<SRC Table>; • REM SQLANALYSIS:T::S:<SRC Table>,<SRC Table>; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S:;
When Source and/or Target Tables are determined based on a query	For example: • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:[table name]; • REM SQLANALYSIS:T:<Tgt Table>,<Tgt Table>:S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T::S: %SQL(SQLid [, paramlist]); • REM SQLANALYSIS:T:%SQL(SQLid [, paramlist]):S:; Where: *SQLid*: Specify the name of an existing SQL definition. *paramlist*: Specify a list of arguments for dynamic substitutions at runtime. The first argument replaces all occurrences of %P(1) in the referenced SQL definition, the second argument replaces %P(2), and so forth. **Note.** The paramlist arguments must be static values. Variable values in the parmlist are not permitted. **Note.** The Query is resolved at the time the Data Conversion Analysis is executed. It is NOT resolved during the Data Conversion Runtime. **Note.** The Query must return one or more valid RECNAME values. No other return results are permitted.
Where there is no Source or Target table to be defined an/or the invalid SQL is to be excluded from the table and dependency analysis.	REM SQLANALYSIS:T::S:PS_EOUF_NORECNAME; **Note.** The "REM SQLANALYSIS:T::S:;" syntax is not a valid override and will be marked as "Invalid" by the EOUFANALYSIS Program.

• Leave the SQL as it is. This results in the invalid SQL being marked as "dependent" on all steps that exist prior to it, and all steps subsequent to the invalid SQL become dependent on it.

Note. This will likely result in slowing the runtime of data conversion and is *not* recommended.

Reviewing the Data Conversion Repositories

The tables in the Data Conversion Analysis repository hold the following data:

- Step actions stored in execution order.

- SQL clauses extracted from step actions.

- Tables featured in SQL clause.

- Bind variables used in SQL.

Analysis information is stored in the following tables:

- PS_UPG_DATACONV

- PS_EOUF_DATACONV

- PS_EOUF_SECLISTTMP

- PS_EOUF_ANALYSIS

- PS_EOUF_DTLIDSQLS

- PS_EOUF_DTLIDSQLSR

Task C-2-3: Reviewing Dependency Analysis

The table usage information identified in the Initial Analysis is subsequently used to determine the dependencies between AE Steps. The Step Dependency Information is then aggregated to the "Root Section" level where a Root Section is defined as a row in the PS_UPG_DATACONV table (UPG_PATH, UPG_GROUP_SEQ_NUM, SEQ_NUM, AE_APPLID, AE_SECTION, ACTIVE_FLAG, UPG_CONV_TYPE).

The following outlines how dependency analysis is structured:

- All groups identified for a particular path in the PS_UPG_DATACONV table can only be dependent on themselves and Group 1. For example, a step in Group 2 can only be dependent on a step (or steps) that precedes it in Group 2 or exists in Group 1.

- A step in Group 2 can not be dependent on a step in Group 3.

- Usage of the PS_EOUF_DUAL, PS_EOUF_COMMON_AET, PS_EOUF_DUMMY or PS_EOUF_NORECNAME tables never results in a dependency.

- A "Invalid SQL" (as defined by the analysis), is dependent on all steps that precede it in its group and in Group 1 (if the invalid step itself is not in Group 1).

- A Select is not dependent on a Select.

Task C-2-4: Reviewing Runtime for EOUFDATACONV

All runtime information for EOUFDATACONV is stored in the following tables:

- PS_EOUF_DATACONV

- PS_EOUF_RUNSTATUS

- PS_EOUF_RUNDETAIL

- PS_EOUF_RUNCOUNT

The EOUFDATACONV Application Engine leverages the Dependency Analysis to optimize the runtime of the data conversion. The runtime of the data conversion is improved in the new PeopleSoft release by running multiple instances of EOUFDATACONV in parallel, executing against a single set of dependency information. The optimal number of instances to be initiated will vary.

EOUFDATACONV determines which "Root Sections" are able to run and executes them. A Root Section is able to run when all Root Sections that are dependent on it have completed successfully.

In the event that multiple root sections are able to run at the same time, steps that have the largest number of dependent Root Sections and/or Root Sections that have the longest run time (in a previous run), are given priority.

In the event of failure, the instance of EOUFDATACONV that encountered the error will mark the step as "Failed" and stop. All other instances of EOUFDATACONV will continue to run. Steps that are dependent on a "Failed" step will be marked as "Blocked" and will not be executed as part of the current run. Upon restarting the process, the "Failed" section and any "Blocked" sections will be executed.

Task C-2-5: Reviewing EO Upgrade Framework Reporting

This section discusses:

• Understanding EO Upgrade Framework Reporting

• Reviewing the Tables Referenced Report

• Reviewing the Customization Impacts Report

• Reviewing Execution Report by Section – Duration

• Reviewing Execution Report by Section – Start Time

• Reviewing the Execution Report by Step

• Reviewing the Execution by Thread Report

• Reviewing the Thread Duration Report

• Reviewing the Execution Comparison Report

• Reviewing the Table Analysis Report

Understanding EO Upgrade Framework Reporting

You can query all tables populated and leveraged by the EO Upgrade Framework (as identified previously) through the various platform specific query tools or psquery. You can gather information in the EOUF tables to identify the following:

•   Tables referenced in the data conversion code.

•   Steps impacted by customizations (prior to the initial data conversion run).

•   Performance issues (after the initial data conversion run).

•   Impact of changes (run to run timing comparisons).

Oracle has delivered a series of standard reports to address the most commonly accessed information in the EOUF repository.

Reviewing the Tables Referenced Report

EOUF0001.SQR lists all tables referenced within the Application Engine data conversion programs. For each table listed, the report displays the section and step in which it is used, whether it is a data source or data target table, and the type of SQL statement in which it is referenced. This report is sorted by table name. Data for this report comes from the PS_EOUF_ANALYSIS, PS_EOUF_DTLIDSQLS, and PS_EOUF_DTLIDTBLS tables. This report can be run anytime after the EOUFANALYSIS Application Engine program has run and populated the EOUF tables used by this SQR.

Reviewing the Customization Impacts Report

EOUF0002.SQR shows the section/steps within the Application Engine data conversion programs that referenced tables with custom added fields. This report is sourced from the PS_EOUF_ANALYSIS table and the PSPROJECTITEM table. This report must be run after the customizations project has been compared against the New Release Demo database.

Reviewing Execution Report by Section – Duration

EOUF0003.SQR shows the duration or execution time for each Application Engine section. Since this report is at a section level, the information is sourced from the PS_EOUF_RUNDETAIL table. The report is ordered by execution time with the poorest performing steps at the top. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion run on which you want to report.

Reviewing Execution Report by Section – Start Time

EOUF0004.SQR shows the duration or execution time for each section. Since this report is at a section level, the information will be sourced from the PS_EOUF_RUNDETAIL table. The report would be ordered by start time so that you can see the order in which the sections were executed. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion run on which you want to report.

Reviewing the Execution Report by Step

EOUF0005.SQR shows the execution time for each section and the associated steps that were run.

This report requires a trace of 16,384 or higher.

Since this report is at a step level, it assumes that a trace of 16,384 or higher has been run so that the step information could be obtained from the PS_EOUF_TIMINGS_DT table. If the appropriate trace has not been run, then a report is not created and output files will be produced. The report will be ordered by execution time with the poorest performing steps at the top.

Reviewing the Execution by Thread Report

EOUF0006.SQR shows the execution timing of each Application Engine section run as part of the data conversion process. This report is sorted so that you can see which sections were executed by each thread. This report is sourced from the PS_EOUF_RUNDETAIL table.

Reviewing the Thread Duration Report

EOUF0007.SQR shows the total duration time for each thread used during the data conversion process. This report is sourced from the PS_EOUF_RUNDETAIL table. It can be run anytime after the PS_EOUF_RUNDETAIL table has been populated from the data conversion run on which you want to report.

Reviewing the Execution Comparison Report

EOUF0008.SQR shows the execution duration from the current run of data conversion as compared to the execution duration from the previous run of data conversion. This report is sourced from the PS_EOUF_RUNDETAIL table. This report can be run anytime after the PS_EOUF_RUNDETAIL table has been populated for the data conversion runs on which you want to report.

Reviewing the Table Analysis Report

EOUF0009.SQR indicates how a particular application table is impacted by the create/alter scripts as well as the data conversion process during the PeopleSoft upgrade. This report is sourced from the PS_PTUALTRECDATA, PS_PTUALTRECFLDDAT, PS_EOUF_ALTRECDATA, PS_EOUF_ANALYSIS, and PS_EOUF_DTLIDTBLS tables. This report can be run after the Alter Analyzer and the AE Analyzer processes have successfully completed. This report is designed to be run against the initial pass database as the data stored in the tables during the Move to Production will differ.

Task C-3: Using the Upgrade Driver Program

The sequence of Application Engine sections that are run by an upgrade driver is maintained in the PS_UPG_DATACONV table. The Application Engine Sections defined in the PS_UPG_DATACONV table are referred to as "Root Sections."

There are three categories of Upgrade Groups:

• PRE – Data Conversion Sections which must be executed in advance of all other sections.

• MAIN – Core Data Conversion

• POST – Data Conversion Sections which must be executed after all other sections.

Note. Your specific upgrade may or may not contain pre-delivered PRE or POST groups.

Upgrade groups contain one or more Application Engine Sections which are ordered within the group by sequence number. The Application Engine program UPG_DATACONV is used to execute PRE and POST data conversion groups. The Application Engine program EOUFDATACONV is used to execute the MAIN data conversion group.

When data conversion is executed using the UPG_DATACONV program, the sequence number is used to determine the "Absolute Run Order" of the upgrade group. When data conversion is executed using the EOUFDATACONV Application Program, the sequence number is used to determine the "Relative Run Order" of Application Engine Sections which reference the same table or tables, but *not* the "Absolute Run Order" of the upgrade group(s).

Task C-4: Using the Upgrade Drivers Page

This section discusses:

• Understanding the Upgrade Drivers Page

• Accessing the Upgrade Drivers Page

- Adding the New Upgrade Drivers Section Page

- Inactivating the Upgrade Drivers Section

Understanding the 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 C-4-1: Accessing the Upgrade Drivers Page

To access the Upgrade Drivers page:

1. From your browser, sign in 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
   F881
   ```

5. Click Search.

   The Upgrade Drivers page appears, as shown in the example below. Following the example of the Upgrade Drivers page are descriptions for each section of the page.

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 C-4-2: Adding the 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 in 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 PeopleSoft Change Assistant template. If you select a group number that already exists in the PS_UPG_DATACONV table, your section will be executed when PeopleSoft 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 PeopleSoft 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 in to your Demo database using PeopleSoft Data Mover and run the following script to export the updated data conversion data:

    `DLUPX03E.DMS`

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

    `DLUPX03I.DMS`

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

Task C-4-3: Inactivating the 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 in to the Demo database.

2. Select Set Up Financials/Supply Chain, Upgrade, Define Upgrade Drivers.

3. Enter your upgrade path:

   ```
   FO8X
   F881
   ```

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 in to your Demo database using PeopleSoft Data Mover and run the following script to export the updated data conversion data:

   ```
   DLUPX03E.DMS
   ```

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

   ```
   DLUPX03I.DMS
   ```

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