
PeopleSoft Enterprise Performance Management 8.8x to 9.1 Upgrade

July 2010

PeopleSoft Enterprise Performance Management 8.8x to 9.1
Upgrade
SKU uepm88xto91_uepm91_073010
Copyright © 2010, Oracle and/or its affiliates. All rights reserved.

Trademark Notice

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

License Restrictions Warranty/Consequential Damages Disclaimer

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

Warranty Disclaimer

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Restricted Rights Notice

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

Hazardous Applications Notice

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Third Party Content, Products, and Services Disclaimer

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

Open Source Disclosure

Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle's PeopleSoft Enterprise products and the following disclaimers are provided:

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright © 2000-2003. The Apache Software Foundation. All rights reserved. Licensed under the Apache License, Version 2.0 (the "License"); you may not use this file except in compliance with the License. You may obtain a copy of the License at <http://www.apache.org/licenses/LICENSE-2.0>.

Unless required by applicable law or agreed to in writing, software distributed under the License is distributed on an "AS IS" BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the License for the specific language governing permissions and limitations under the License.

OpenSSL

Copyright © 1998-2005 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

ICU

ICU License - ICU 1.8.1 and later COPYRIGHT AND PERMISSION NOTICE Copyright © 1995-2003 International Business Machines Corporation and others. All rights reserved.

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, provided that the above copyright notice(s) and this permission notice appear in all copies of the Software and that both the above copyright notice(s) and this permission notice appear in supporting documentation. THE SOFTWARE IS PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT OF THIRD PARTY RIGHTS. IN NO EVENT SHALL THE COPYRIGHT HOLDER OR HOLDERS INCLUDED IN THIS NOTICE BE LIABLE FOR ANY CLAIM, OR ANY SPECIAL INDIRECT OR CONSEQUENTIAL DAMAGES, OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN AN ACTION OF CONTRACT, NEGLIGENCE OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE. Except as contained in this notice, the name of a copyright holder shall not be used in advertising or otherwise to promote the sale, use or other dealings in this Software without prior written authorization of the copyright holder.

All trademarks and registered trademarks mentioned herein are the property of their respective owners.

Sun's JAXB Implementation – JSDK 1.5 relaxngDatatype.jar 1.0 License

Copyright © 2001, Thai Open Source Software Center Ltd, Sun Microsystems. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE REGENTS OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

W3C IPR SOFTWARE NOTICE

Copyright © 2000 World Wide Web Consortium, (Massachusetts Institute of Technology, Institut National de Recherche en Informatique et en Automatique, Keio University). All Rights Reserved.

Note: The original version of the W3C Software Copyright Notice and License could be found at <http://www.w3.org/Consortium/Legal/copyright-software-19980720>.

THIS SOFTWARE AND DOCUMENTATION IS PROVIDED "AS IS," AND COPYRIGHT HOLDERS MAKE NO REPRESENTATIONS OR WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE OR THAT THE USE OF THE SOFTWARE OR DOCUMENTATION WILL NOT INFRINGE ANY THIRD PARTY PATENTS, COPYRIGHTS, TRADEMARKS OR OTHER RIGHTS. COPYRIGHT HOLDERS WILL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF ANY USE OF THE SOFTWARE OR DOCUMENTATION.

Contents

Preface

About This Documentation.....	xxiii
Understanding This Documentation.....	xxiii
Prerequisites.....	xxiii
Audience.....	xxiii
Organization.....	xxiv
Typographical Conventions.....	xxiv
Products.....	xxv
Related Information.....	xxvi
Comments and Suggestions.....	xxvi

Chapter 1

Planning Your Application Upgrade.....	1
Understanding Application Upgrade Planning.....	1
Understanding Your Upgrade.....	1
Understanding PeopleSoft Upgrades.....	2
Verifying the Software Installation.....	2
Defining Upgrade Databases.....	2
Reviewing Upgrade Notes and Tips.....	3
Copying Your Production Database.....	3
Making a Copy of Production Database.....	4
Increasing Database Space.....	4
Preparing Your Upgrade Job.....	5
Modifying the DB2 Scripts.....	5
Editing the Language Swap Scripts.....	6
Evaluating Upgrade Steps for Your Upgrade Job.....	6
Modifying Compare Report Options.....	7
Optimizing the Create and Alter Process.....	8
Identifying Customizations.....	9
Backing Up Demo Databases	11
Backing Up the Copy of Current Demo	11
Backing Up the New Release Demo	12

Chapter 2

Preparing Your Database for Upgrade.....	13
Understanding Database Preparation.....	13
Applying Upgrade Planning Files.....	14
Understanding Applying Upgrade Planning Files.....	14
Applying the UPGOPT Project.....	14
Building the UPGOPT Project.....	14
Setting Up Upgrade Planning Security.....	15
Editing Upgrade Planning DB2 Scripts.....	16
Updating Statistics.....	16
Running Initial Audit Reports.....	17
Understanding Running Initial Audit Reports.....	17
Running the Initial DDDAUDIT Report.....	17
Running the Initial SYSAUDIT Report.....	18
Creating the INITALTAUD Project.....	18
Running the Initial Alter Audit.....	19
Reviewing the Initial Audits.....	19
Evaluating Global Consolidations Entries.....	20
Enabling Global Consolidations Queries.....	21
Running Global Consolidations Queries.....	23
Running GC Journal Publish Rule Query.....	24
Running Application Information Queries.....	25
Running KPI Manager Queries.....	25
Associating an Employee ID to a User ID.....	27
Upgrading Project Request IDs.....	27
Identifying Duplicate Project Request IDs.....	27
Determining Whether Update Was Applied.....	29
Editing Script for New Project Request IDs.....	30
Running Duplicate Project Request ID Script.....	31
Preparing to Upgrade OBJECTOWNERIDs.....	31
Loading PeopleSoft OBJECTOWNERID Values.....	32
Identifying Custom PF_OWNER Values.....	32
Editing the Custom PF_OWNER Script.....	33
Loading Custom PF_OWNER Values.....	33
Defining Defaults for the OWE Upgrade.....	34
Understanding Default Source Information.....	34
Identifying Source System IDs.....	35
Assigning Defaults for the OWE Upgrade.....	36
Identifying Custom Object Types.....	36
Performing Budgeting Application Activities.....	37

Checking In Budgeting Activities.....	37
Exporting Line Item Budgeting Data.....	37
Analyzing the Impact of BP_CF9B_AK_SBR Changes.....	38
Reviewing Table Row Counts.....	38
Preparing Your Database	39
Understanding Database Preparation.....	39
Verifying Database Integrity.....	39
Cleaning the PSOBJCHNG Table.....	40
Purging Message Queues.....	40
Dropping PeopleTools Tables.....	41
Cleaning Up PeopleTools Data.....	41
Shrinking Images.....	42
Comparing Customizations.....	43
Running the UPGCUST Compare.....	43
Running the UPGCUST Filter Script.....	44
Reviewing the UPGCUST Compare Log.....	45
Preparing for the Application Upgrade.....	45
Creating a Copy of RecField Definitions.....	45
Creating a Copy of DBField Definitions.....	46
Exporting Copy of SET_CNTRL_REC.....	46
Importing Copy of SET_CNTRL_REC.....	46
Running the PUUPJ01 Drop Table Script.....	47
Running the PUBGN01 Drop Table Script.....	47
Running the PUPPKN01 Drop Table Script.....	48
Running the PUFTN01 Drop Table Script.....	48
Running the PUPFX01 Drop Table Script.....	49
Loading the Alter Analyzer Data.....	49
Deleting Old Pagelet Wizard Data.....	49
Backing Up After Preparing Your Database.....	50

Chapter 3

Applying PeopleTools Changes.....	51
Understanding PeopleTools Changes.....	52
Verifying the Upgrade User.....	52
Performing Script Modifications.....	53
Understanding Script Modifications.....	54
Updating the Configuration Manager Profile.....	54
Running a DBTSFIX Report.....	55
Editing the DBTSFIX Output Scripts.....	55

Editing the GRANT Script.....	56
Editing the PTxxxTLS Scripts.....	56
Editing the DB2 Scripts.....	57
Editing Move to Production Import Scripts.....	57
Editing the Move to Production Password.....	58
Editing the DDL Parameters.....	59
Preparing for the Integration Broker Conversion.....	59
Preparing for a PeopleTools Patch.....	60
Editing Application Tablespace Step Properties.....	62
Editing Multilingual Step Properties.....	63
Editing Data Type Steps.....	63
Performing Updates to PeopleTools System Tables	64
Understanding Updating PeopleTools System Tables.....	64
Cleaning Up Message Data.....	65
Updating System Catalog Views.....	65
Updating PeopleTools System Tables.....	65
Granting Privileges to the CONNECT ID.....	66
Exporting Installation Data.....	66
Updating the Product License Code.....	66
Updating the Database for Timestamp.....	67
Updating PeopleTools Patch Information.....	67
Creating Temporary Performance Indexes.....	67
Exporting PeopleTools System Tables.....	68
Importing PeopleTools System Tables.....	68
Resetting the Database Options Flag.....	69
Rerunning Update Statistics for DB2 zOS.....	69
Rerunning the RUNSTATS Report for DB2 UNIX NT.....	69
Rerunning Update Statistics for DB2 UNIX NT.....	70
Rerunning Update Statistics for Informix.....	70
Rerunning Update Statistics for Oracle	70
Saving Transparent Data Encryption Information.....	70
Turning Off Change Control	71
Loading Model Definition Data.....	71
Understanding Loading Model Definition Data.....	72
Loading Model Definitions for DB2 zOS.....	72
Loading Model Definitions for DB2 UNIX NT.....	72
Loading Model Definitions for Oracle.....	72
Loading Model Definitions for Informix.....	72
Loading Model Definitions for Microsoft.....	73
Loading Model Definitions for Sybase.....	73

Loading Message Data.....	73
Reviewing PeopleTools Objects.....	73
Copying Projects	75
Understanding Copying Projects.....	75
Copying the PPLTLS84CUR Project.....	75
Copying the PPLTLS84CURML Project.....	76
Copying the PPLTLSML Project.....	77
Copying the PPLTLS84CURDEL Project.....	78
Copying the PATCH85X Project.....	79
Copying the PATCH85XML Project.....	79
Populating Tablespace Data.....	79
Creating Application Tablespaces.....	80
Creating Application Tablespaces for Informix.....	80
Populating Updated Tablespace Data.....	80
Updating Tablespace Names.....	81
Building the Updated PeopleTools Project.....	82
Generating the Updated PeopleTools Script.....	82
Editing the Updated PeopleTools Script.....	82
Running the Updated PeopleTools Script.....	83
Migrating Records to New Tablespaces.....	83
Understanding Record Migration to New Tablespaces.....	83
Copying the PT84TBLSPC Project.....	83
Building the Tablespace Alter Script.....	84
Editing the Tablespace Alter Script.....	84
Running the Tablespace Alter Script.....	84
Loading Base Data.....	85
Loading Language Data.....	85
Populating the Language Table.....	85
Loading the Language Data.....	86
Loading PeopleTools Data.....	86
Loading Noncomparable Objects.....	86
Loading English Messages.....	86
Loading English String Data.....	87
Loading Stored Statements Data.....	87
Loading PeopleTools Definition Group.....	87
Converting PeopleTools Objects	88
Updating the REN Server Configuration.....	88
Populating MCF Data.....	88
Converting Portal Objects.....	89
Converting Query Prompt Headings.....	90

Encrypting Connector Passwords.....	90
Loading Conversion Data.....	90
Reporting Conversion Details.....	91
Running PeopleTools Data Conversion.....	91
Creating PeopleTools Views.....	91
Creating Updated PeopleTools Views.....	91
Converting Integration Broker.....	92
Understanding Converting Integration Broker.....	92
Updating Integration Broker Defaults.....	92
Creating Integration Broker Objects.....	92
Saving Application Messaging Objects	93
Exporting Node Transactions.....	93
Preparing Integration Broker Deletes.....	93
Deleting Application Messaging Objects	93
Deleting Node Transactions.....	94
Converting Integration Broker Objects.....	94
Updating Process Request Tables.....	94
Clearing the Rowset Cache.....	95
Setting Object Version Numbers.....	95
Converting Database Data Types.....	95
Understanding Converting Database Data Types.....	97
Backing Up Before Platform Changes.....	98
Running the Long Data Audit.....	98
Validating the Microsoft Database.....	98
Reviewing Microsoft Settings.....	99
Creating the Microsoft Conversion Project.....	99
Generating the Microsoft Conversion Script.....	99
Running the Microsoft Conversion Script.....	100
Granting Permissions to the CONNECT ID.....	100
Running the Microsoft Conversion Report.....	100
Validating the Oracle Database.....	100
Creating Oracle Audit Tables.....	101
Auditing Duplicate Length Constraints.....	101
Auditing Disabled Constraints.....	101
Reviewing Oracle Settings	102
Generating Oracle Conversion Scripts.....	102
Running Long to LOB Script 1.....	104
Running Long to LOB Script 2.....	105
Running Long to LOB Script 3.....	105
Running Long to LOB Script 4.....	105

Running Long to LOB Script 5.....	105
Running Long to LOB Script 6.....	106
Running Long to LOB Script 7.....	106
Running Long to LOB Script 8.....	106
Auditing the Long to LOB Conversion.....	106
Running CLS Drop Indexes Script 1.....	107
Running CLS Drop Indexes Script 2.....	107
Running CLS Drop Indexes Script 3.....	107
Running CLS Drop Indexes Script 4.....	107
Running CLS Drop Indexes Script 5.....	108
Running CLS Drop Indexes Script 6.....	108
Running CLS Drop Indexes Script 7.....	108
Running CLS Drop Indexes Script 8.....	108
Running Character Length Script 1	109
Running Character Length Script 2.....	109
Running Character Length Script 3.....	109
Running Character Length Script 4	109
Running Character Length Script 5.....	110
Running Character Length Script 6.....	110
Running Character Length Script 7.....	110
Running Character Length Script 8.....	110
Running CLS Rebuild Indexes Script 1.....	111
Running CLS Rebuild Indexes Script 2.....	111
Running CLS Rebuild Indexes Script 3.....	111
Running CLS Rebuild Indexes Script 4.....	111
Running CLS Rebuild Indexes Script 5.....	112
Running CLS Rebuild Indexes Script 6.....	112
Running CLS Rebuild Indexes Script 7.....	112
Running CLS Rebuild Indexes Script 8.....	112
Auditing Character Length Semantics.....	113
Reviewing Conversion Reports.....	113
Updating Database Options.....	114
Converting Oracle Time Data Types.....	114
Understanding Oracle Time Data Types Conversion.....	115
Backing Up Before Converting Data Types.....	115
Creating Conversion Audit Tables.....	116
Auditing Date to Timestamp Conversion.....	116
Generating Timestamp Conversion Scripts.....	116
Running Drop Indexes Script 1.....	119
Running Drop Indexes Script 2.....	119

Running Drop Indexes Script 3.....	119
Running Drop Indexes Script 4.....	120
Running Drop Indexes Script 5.....	120
Running Drop Indexes Script 6.....	120
Running Drop Indexes Script 7.....	120
Running Drop Indexes Script 8.....	121
Running Alter Timestamps Script 1.....	121
Running Alter Timestamps Script 2.....	121
Running Alter Timestamps Script 3.....	121
Running Alter Timestamps Script 4.....	122
Running Alter Timestamps Script 5.....	122
Running Alter Timestamps Script 6.....	122
Running Alter Timestamps Script 7.....	122
Running Alter Timestamps Script 8.....	123
Running Rebuild Indexes Script 1.....	123
Running Rebuild Indexes Script 2.....	123
Running Rebuild Indexes Script 3.....	123
Running Rebuild Indexes Script 4.....	124
Running Rebuild Indexes Script 5.....	124
Running Rebuild Indexes Script 6.....	124
Running Rebuild Indexes Script 7.....	124
Running Rebuild Indexes Script 8.....	125
Backing Up After the PeopleTools Upgrade.....	125
Configuring the Scheduler and Server.....	125

Chapter 4

Running and Reviewing Compare Reports.....	127
Understanding Compare Reports.....	127
Preparing for Application Changes.....	127
Exporting Project Definitions.....	128
Importing Project Definitions.....	128
Running the DLPFUPN01 Drop Table Script.....	128
Modifying UPGSYNCALL Compare Options.....	128
Running Compare UPGSYNCALL.....	130
Reviewing the UPGSYNCALL Compare Reports.....	130
Copying the UPGSYNC Project.....	131
Copying the UPGSYNC Project Definition.....	131
Copying the UPGSYNCTEMP Project.....	131
Running the Alter Analyzer Loader.....	132

Renaming Tables.....	132
Understanding Renamed Tables.....	132
Running the RNPFN01MSS Script.....	133
Running the RNPFN01DB2 Script.....	133
Running the RNPFN01DBX Script.....	133
Running the RNPFN01ORA Script.....	133
Running the RNPFN02MSS Script.....	134
Running the RNPFN02DB2 Script.....	134
Running the RNPFN02DBX Script.....	134
Running the RNPFN02ORA Script.....	135
Running New Release Compare Reports.....	135
Understanding the New Release Compare.....	135
Preserving the Local Message Node.....	135
Running the New Release UPGCUST Compare.....	136
Creating the UPGIB Project.....	136
Reviewing New Release Compare Reports.....	136
Reviewing New Release Changes.....	136
Reviewing Additional Upgrade Projects.....	137

Chapter 5

Applying Application Changes.....	139
Understanding Application Changes.....	140
Running the New Release Upgrade Copy.....	140
Exporting Selected PeopleTools Tables.....	140
Importing Selected PeopleTools Tables.....	141
Copying the UPGCUST Project	141
Reviewing Copy Results.....	141
Modifying Budgeting Subrecord BP_CF9B_AK_SBR.....	142
Swapping PeopleTools Tables.....	142
Updating Target Values	143
Copying the UPGIB Project.....	143
Copying the UPGNONCOMP Project.....	143
Reviewing Project Copy Results	144
Exporting New Release Objects.....	144
Importing New Release Objects.....	144
Resetting Object Version Numbers.....	145
Updating Database Overrides.....	145
Understanding Database Overrides.....	145
Setting Index Parameters After Copy	145

Setting Tablespace Names After Copy.....	146
Setting Record Parameters After Copy.....	146
Creating New Tablespaces.....	147
Backing Up After the Upgrade Copy.....	149
Backing Up Your Database After Upgrade Copy.....	149
Backing Up the New Release Demo Again.....	149
Preparing for Data Conversion Analysis.....	150
Populating the Initial Alter Analyzer Repository.....	150
Populating the MTP Alter Analyzer Repository.....	150
Copying the EOUF_UPGRADE_FRAMEWORK Project.....	151
Building the EOUF_UPGRADE_FRAMEWORK Project.....	151
Running the EOUF_UPGRADE_FRAMEWORK Script.....	151
Running the SQL Rename Tool.....	151
Understanding the SQL Rename Tool.....	152
Running the SQL Rename Tool for RNPFN01.....	152
Running the SQL Rename Tool for RNPFN02.....	152
Altering the UPGSYNC Records.....	152
Understanding UPGSYNC Records Alteration.....	153
Building the UPGSYNC Alter Script.....	153
Editing the UPGSYNC Alter Script.....	153
Running the UPGSYNC Alter Script.....	154
Modifying the Database Structure.....	154
Understanding Modifying the Database Structure.....	155
Backing Up for DB2.....	155
Building the Upgrade Tables Script.....	156
Re-Creating Upgrade Tables.....	156
Creating the Upgrade Projects.....	156
Building the Alter Temporary Tables Script.....	157
Building the Optional Temporary Tables Script.....	157
Creating the ALLTEMPTABS Project.....	158
Building the Create Temporary Tables Script.....	158
Creating the ALLTABS Project.....	158
Building the Create and Alter Scripts.....	158
Editing the Create and Alter Scripts.....	159
Re-Creating Required Temporary Tables.....	160
Re-Creating Optional Temporary Tables.....	160
Creating Temporary Tables.....	160
Creating Tables.....	161
Altering Tables.....	161
Creating Indexes.....	161

Re-Creating Triggers.....	162
Reviewing the Create Indexes Log.....	162
Setting Index Parameters.....	162
Setting Temporary Table Tablespace Names.....	163
Setting Tablespace Names.....	163
Setting Record Parameters.....	163
Generating the DB2 UNIX RUNSTATS Script	164
Updating Statistics for DB2 UNIX.....	164
Updating Statistics for DB2 zOS.....	164
Updating Statistics for Informix.....	164
Updating Statistics for Oracle.....	165
Loading Data for Data Conversion.....	165
Swapping Languages on System Data.....	166
Exporting Application Messages.....	166
Importing Application Messages.....	166
Exporting Record Groups.....	167
Importing Record Groups.....	167
Exporting the System Setup Data	168
Importing the System Setup Data.....	168
Exporting the PW Pagelet Data.....	169
Importing the PW Pagelet Data.....	169
Exporting the Pagelet Wizard Data.....	169
Importing the Pagelet Wizard Data.....	169
Exporting the Feed Data.....	170
Importing the Feed Data.....	170
Exporting Upgrade Defaults.....	170
Importing Upgrade Defaults.....	171
Exporting Data Conversion Driver Data.....	171
Importing Data Conversion Driver Data.....	171
Applying Updates Before Data Conversion.....	172
Running the Data Conversion Analyzer.....	173
Backing Up Before Data Conversion.....	173
Running Data Conversion	173
Understanding Data Conversion.....	174
Reviewing Data Conversion Tips.....	174
Turning Trace On.....	176
Performing Data Conversion Concurrently.....	177
Turning Trace Off.....	177
Backing Up After Data Conversion.....	177
Finalizing the Database Structure.....	178

Understanding the Final Database Structure.....	178
Building the Alter with Deletes Scripts.....	178
Altering Tables with Deletes.....	178
Creating Indexes Again.....	179
Creating Triggers.....	179
Running the AE SYNCIDGEN Process.....	179
Creating All Views.....	180
Preparing for Mass Compile of Metadata.....	180
Understanding Mass Compile of Metadata.....	180
Loading System Data into Upgrade Table.....	181
Reviewing New System Metadata.....	181
Reviewing Changed System Metadata.....	181
Reviewing Customized System Metadata.....	182
Deleting System Metadata.....	182
Removing Duplicate Data.....	182
Cleaning Metadata and Search Table Data.....	183
Loading Data to Complete System Setup.....	183
Exporting Strings.....	184
Importing Strings.....	184
Exporting EDI Statements.....	184
Importing EDI Statements.....	185
Exporting Mass Change Data.....	185
Importing Mass Change Data.....	185
Exporting XML Service Information.....	185
Importing XML Service Information.....	186
Exporting Related-Language System Data.....	186
Importing Related-Language System Data.....	186
Exporting Application System Data.....	187
Importing Application System Data.....	187
Exporting Dimension Metadata System Data.....	187
Importing Dimension Metadata System Data.....	188
Exporting Common Portal System Options.....	188
Importing Common Portal System Options.....	188
Exporting Setup Data.....	189
Importing Setup Data.....	189
Setting Portal System Options.....	189
Setting Menu Pagelet Values.....	190
Loading Personalizations.....	190
Exporting Personalizations.....	190
Importing Personalizations.....	190

Completing Application Conversion.....	191
Updating Driver IDs.....	191
Updating Language Data.....	191
Understanding Updating Language Data.....	191
Running the TSRECPOP Script.....	191
Completing the PeopleTools Conversion.....	192
Updating Object Version Numbers.....	192
Running the Final Audit Reports.....	192
Running the Final DDDAUDIT Report.....	193
Running the Final SYSAUDIT Report.....	193
Creating the FNLALTAUD Project.....	193
Running the Final Alter Audit.....	193
Reviewing the Final Audits.....	194
Running the Final SETINDEX Report.....	195
Running the Final SETTABLE Report.....	195

Chapter 6

Completing Database Changes.....	197
Understanding Database Changes.....	198
Configuring the Upgrade Environment.....	198
Configuring the Web Server.....	198
Configuring Portal.....	198
Reapplying Customizations.....	199
Understanding the Reapplication.....	199
Performing Customized Object Adjustment.....	199
Registering Portal Navigation Objects.....	200
Setting Up Security.....	200
Understanding Security.....	201
Performing Security Setup.....	201
Synchronizing CREF Permissions.....	201
Granting Access to Personalize the Homepage.....	202
Completing Portal Data Conversion.....	203
Reviewing the Pagelet and Collection Log.....	203
Enabling Pagelet Publishing.....	204
Reviewing PeopleTools Functionality.....	205
Enabling Oracle Transparent Data Encryption.....	206
Defining Source System IDs.....	207
Refreshing User Defined Ledger Template.....	209
Reviewing Application Message Settings.....	209

Upgrading Project Request Milestones.....	210
Activating Security Groups.....	210
Upgrading Consolidation Processes.....	211
Upgrading Workforce Analytics.....	213
Reloading the Analytic Calculation Engine Model.....	213
Integrating with Position Budgeting Data.....	214
Populating the Employee Total Field.....	214
Synchronizing Metadata.....	214
Synchronizing Record Suites for Non DB2.....	215
Synchronizing Record Suites for DB2.....	215
Running the Mass Compile.....	216
Reloading Data Mapper Rule Set Columns.....	217
Running Application Security Processing.....	218
Exporting KPI Calculation Definitions.....	219
Deleting Obsolete Objects.....	220
Importing KPI Calculation Definitions.....	220
Recompiling Application Rules.....	221
Importing KPI Calculation Data.....	222
Fixing KPI Calculation Definitions.....	222
Running KPI Manager Rules Compile.....	223
Running the Metadata Audit.....	223
Reviewing the Metadata Audit Results.....	224
Upgrading Legacy Business Unit Mappings.....	225
Understanding Legacy Business Unit Mappings.....	225
Backing Up Business Unit Tables.....	225
Running Dimension Mapper ETL Jobs.....	225
Defining Warehouse Sources.....	226
Generating Source Lineage.....	227
Enabling Query Security.....	227
Confirming All Inputs Are Present.....	228
Completing the Mapping Process.....	229
Upgrading GC Journal Publish Mapper Rules.....	230
Fixing Scorecard User Security.....	231
Enabling Scorecard User Query.....	232
Identifying Scorecard User Security Values.....	232
Fixing Scorecard User Defaults.....	233
Enabling Scorecard User Defaults Query.....	233
Identifying Scorecard User Default Values.....	234
Fixing KPI Assessment Images.....	234
Enabling the KPI Assessment Image Query.....	235

Identifying KPI Assessment Definitions.....	235
Updating KPI Descriptions.....	236
Installing the EPM Charting Tool	236
Preparing the Content Provider Registry.....	237
Updating the Portal Options Data.....	237
Stamping the Database.....	238
Reviewing Change Control.....	238
Backing Up Before Testing.....	239
Testing Your Copy of Production.....	239

Chapter 7

Applying Changes to the Production Database.....	241
Understanding the Move to Production.....	241
Testing the Move to Production.....	241
Understanding the Test Move to Production Passes.....	241
Understanding the Test Move to Production Steps.....	242
Creating a New Change Assistant Job.....	243
Testing Once More.....	244
Performing the Move to Production.....	244

Chapter 8

Appendices.....	245
Understanding Appendices.....	245

Appendix A

Applying Fixes Required for Upgrade.....	247
Preparing to Apply Fixes.....	247
Applying Fixes During Installation.....	248
Applying Fixes After Copying Project.....	248
Applying Fixes After Data Conversion.....	249
Applying Fixes Between Upgrade Passes.....	249
Applying Fixes in Move to Production.....	250

Appendix B

Changing the User Interface.....	251
Changing the User Interface Style.....	251

Appendix C

Fixing Compilation Errors.....	255
Understanding Fixing Compilation Errors.....	255
Reviewing Mass Compile and Metadata Audit Errors.....	255
Determining the Errors You Must Fix.....	255
Determining the Errors You Can Ignore.....	256
Reviewing Application Rule Compilation Errors.....	257

Appendix D

Preserving Queries and Tree Objects.....	259
Understanding Preserving Queries and Trees.....	259
Preparing the Database.....	260
Creating a New Project.....	260
Comparing the New Project.....	261
Copying the Project.....	262
Testing the Project.....	262
Re-Exporting the PeopleTools Tables.....	262

Appendix E

Upgrading the Content Provider Registry.....	265
Understanding Content Provider Registry Upgrade.....	265
Copying Your Portal Solutions Database.....	267
Upgrading PeopleTools for Portal Solutions	267
Updating Registry Permission Lists.....	267
Understanding Registry Permission List Updates.....	267
Updating the Portal Registry.....	268
Deleting the Database Cache.....	268
Creating the Portal Project.....	268
Understanding Portal Project Creation.....	269
Creating the Target Portal Solutions Project.....	269
Cleaning the Target Portal Solutions Project.....	270
Deleting the Target Portal Solutions Database Cache.....	270
Copying the Target Portal Solutions Project Definition.....	271
Creating the Copy of Production Portal Project.....	271
Cleaning the Copy of Production Portal Project.....	274
Deleting the Copy of Production Database Cache.....	274
Comparing the Portal Project.....	274
Reviewing the Portal Project.....	275

Copying the Portal Project.....	275
Understanding Portal Project Copying.....	275
Copying the Portal Project to the Portal Solutions Database.....	276
Deleting the Portal Solutions Database Cache.....	276
Copying the Portal Project to Production.....	276
Understanding Portal Project to Production Copying.....	277
Copying the Portal Project to File.....	277
Copying the Portal Project from File.....	277
Deleting the Portal Solutions Database Cache Again.....	278
Deleting Obsolete Folders.....	278
Understanding Obsolete Folder Deletion.....	278
Deleting Obsolete Folders on Portal Solutions 8.4.....	278
Deleting Obsolete Folders on Portal Solutions 8.8.....	279
Updating Registry Folder Permissions.....	279
Understanding Registry Folder Permissions Updates.....	279
Updating Portal Solutions Registry Folder Permissions.....	280
Deleting the Portal Solutions Cache.....	280

Appendix F

Using Data Conversion Utilities.....	281
Understanding Data Conversion Utilities.....	281
Using the UPGDATACONV Process.....	281
Understanding the UPGDATACONV Process.....	281
Reviewing the Data Conversion Report.....	282
Using the EO Upgrade Framework Process.....	282
Understanding the EO Upgrade Framework Process.....	282
Reviewing EO Upgrade Framework Initial Analysis.....	282
Reviewing Dependency Analysis.....	286
Reviewing Runtime for EOUPDATACONV.....	286
Reviewing EO Upgrade Framework Reporting.....	287
Using the Upgrade Driver Program.....	289
Using the Upgrade Drivers Page.....	289
Understanding the Upgrade Drivers Page.....	290
Accessing the Upgrade Drivers Page.....	290
Adding the New Upgrade Drivers Section Page.....	291
Inactivating the Upgrade Drivers Section.....	291

Appendix G

Using the Comparison Process293

Understanding the Comparison Process.....293

 Reviewing the Source and Target Columns.....294

 Reviewing the Action Column.....295

 Reviewing the Upgrade Column.....295

 Putting It All Together.....295

Understanding Upgrade Compare Reports.....296

 Reviewing Report Columns.....296

 Using Reports.....297

Index299

About This Documentation

This preface discusses:

- Understanding This Documentation
- Prerequisites
- Audience
- Organization
- Typographical Conventions
- Products
- Related Information
- Comments and Suggestions

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.
<i>Italics</i>	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 <i>O</i> .
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 <i>See</i> 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 <i>See Also</i> 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 <i>Note</i> 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 <i>Important!</i> 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 <i>Warning!</i> 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 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.

- *Installation Guides.* Before you begin your upgrade, ensure that you have installed PeopleSoft PeopleTools and completed the installation of your PeopleSoft application, if applicable.

To find the installation documentation for PeopleSoft PeopleTools or for your PeopleSoft application, go to My Oracle Support and search for the installation guide 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

Planning Your Application Upgrade

This chapter discusses:

- Understanding Application Upgrade Planning
- Understanding Your Upgrade
- Copying Your Production Database
- Preparing Your Upgrade Job
- Identifying Customizations
- Backing Up Demo Databases

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). In this chapter, you will also prepare your upgrade job and identify any customizations you have made to your 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 1-1: 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 1-1-1: 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 1-1-2: 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 1-1-3: 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.

- Performance Recommendations

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

- Enterprise Warehouse Operational Data Store Support

This policy statement governs the upgrade policy for Oracle's PeopleSoft Enterprise Warehouse Operational Warehouse.

Oracle does not support the upgrade of the warehouses for the PeopleSoft EPM 8.8 release. This is because there has been a major architectural change between PeopleSoft EPM 8.8 and 9.1. Therefore, you will have to implement the PeopleSoft EPM 9.1 warehouses as delivered and will not be able to carry over the data in the staging tables or the data in the dimensions and fact tables.

- 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 1-2: Copying Your Production Database

This section discusses:

- Making a Copy of Production Database
- Increasing Database Space

Task 1-2-1: 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

Task 1-2-2: Increasing Database Space

To prepare for the upgrade, you may need to increase the space allocated to your Copy of Production database. Depending on your relational database management system (RDBMS), this may include allocating space to tablespaces or allocating database primary space and log files. Be aware that your new environment needs to accommodate both the existing data in your Copy of Production database as well as the new data, new data structures, and new database objects. Every site and configuration is different, so Oracle cannot offer a guaranteed estimate of your database sizing needs.

As part of the initial upgrade pass, you may need to revisit your initial space allocation settings more than once as you progress through the upgrade. At the end of the initial pass, the final space allocation settings will closely reflect the space you will need to complete any subsequent Move to Production passes. Work with your database administrator to ensure that your environment is set up appropriately for both the initial and Move to Production passes.

See the PeopleSoft installation documentation for your product line and release.

Note. Oracle RDBMS customers also need to alter the tablespace for PSIMAGE and increase it to 200 MB; autoextend on next 10 MB; maxsize unlimited.

Properties

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

Task 1-3: Preparing Your Upgrade Job

This section discusses:

- Modifying the DB2 Scripts
- Editing the Language Swap Scripts
- Evaluating Upgrade Steps for Your Upgrade Job
- Modifying Compare Report Options
- Optimizing the Create and Alter Process

Task 1-3-1: Modifying the DB2 Scripts

Perform this step only if your database platform is DB2 z/OS. DB2 z/OS scripts that create tables need the `set_current_sqlid` statement so that the tables are created with the correct owner ID. Open each script listed below, then uncomment and modify all of the DB2-specific statements to reflect your environment.

For SQL scripts, if the script does not contain DB2-specific statements, add the following line to the top of the script and edit it for your environment, inserting the appropriate owner ID in uppercase characters:

```
set current sqlid = 'OWNERID (in uppercase)';
```

For PeopleSoft Data Mover scripts (DMSs), if the script does not contain DB2-specific statements, add the following line to the top of the script and edit it for your environment, inserting the appropriate owner ID in uppercase characters:

```
set execute_sql set current sqlid = 'OWNERID (in uppercase)';
```

Following is a list of the scripts you need to edit:

```
DLUPX02I.DMS
DLUPX13I.DMS
DLUPX14I.DMS
DLUPX16I.DMS
DLUPX96I.DMS
DLPFLASYSI.DMS
DLPFSYSI.DMS
DLPFX01I.DMS
```

Note. The DLUPX96I.DMS script runs on your Source database. Remember to edit this script for your *Source* database. All of the other scripts listed run against the Target database.

In several steps in the upgrade process, project definitions are copied into the database. Any DB2 z/OS scripts that are built from these projects need to be modified before running them. When the SQL scripts are built after copying the projects, the database/tablespace names are the default values. These values need to be changed to the Target database-specific values.

Set the steps that run the generated scripts (typically, the "Running the xxx Script" step following a "Building/Generating the xxx Script/Project" step) in your PeopleSoft Change Assistant job to a manual stop, and edit the scripts for correct database/tablespace information. To set a step as a manual stop in PeopleSoft Change Assistant, highlight the step and select Edit, Stop from the menu bar.

In chapter 5, "Applying Application Changes," set the step Re-Creating Upgrade Tables (in the task Modifying the Database Structure) as a manual stop and edit the UPGCONVERT_CRTTBL.SQL script.

Properties

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

Task 1-3-2: Editing the Language Swap Scripts

This step should only be completed if your Copy of Production has a base language other than English.

Later in the upgrade, you will swap system data tables and PeopleSoft PeopleTools managed object tables that have related languages on your New Release Demo database. This ensures that the tables are translated correctly when you copy to your Copy of Production. In this step, you must edit the swap scripts to set your New Release Demo database language to the same language as your Copy of Production.

Follow the edit instructions in each script.

The swap scripts for your path are:

```
PT_RELEASE_SWAP.DMS
```

Properties

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

Task 1-3-3: Evaluating Upgrade Steps for Your Upgrade Job

In this step, evaluate steps in your upgrade job that need editing in order to meet your project requirements.

Editing the Create and Alter Scripts: If you are reusing any create and alter scripts from a prior upgrade pass during any move to production passes, review the scripts to determine if the appropriate edits have been made. If they have been made, then at this time, the step Editing the Create and Alter Scripts may be marked as complete.

Determine if the following steps are needed in your upgrade. If they are needed, follow the step instructions to automate them:

- Deleting Old Pagelet Wizard Data
- Swapping PeopleTools Tables (if your Base Language is non-English)
- Swapping Languages on System Data (if your Base Language is non-English)

Properties

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

Task 1-3-4: Modifying Compare Report Options

For compare steps, PeopleSoft Change Assistant templates are delivered with the default reports filter turned on in the compare options. This limits the size of the reports and keeps them manageable. Before you start the compares, review the PeopleSoft Change Assistant job for each compare step listed below and modify the compare options based on your requirements.

If you decide not to modify the compare options, the objects are still compared. However, the results are only available online in PeopleSoft Application Designer and are not written to the compare reports. The compare reports are tools to help you review changed objects. However, based on the report filters you select, you may need to review the action flags for other objects in the compare project in PeopleSoft Application Designer.

For example, you can modify the compare options so that the report contains customized objects that are present in your Copy of Production database but absent from the Demo database. Alternatively, you can review these objects online, through PeopleSoft Application Designer, after the compare.

To modify upgrade compare options:

1. Highlight the “Running the UPGCUST Compare” step and right-click.

2. Select Step Properties.

The Step Properties dialog box appears.

3. Click Upgrade.

The Compare and Report dialog box appears.

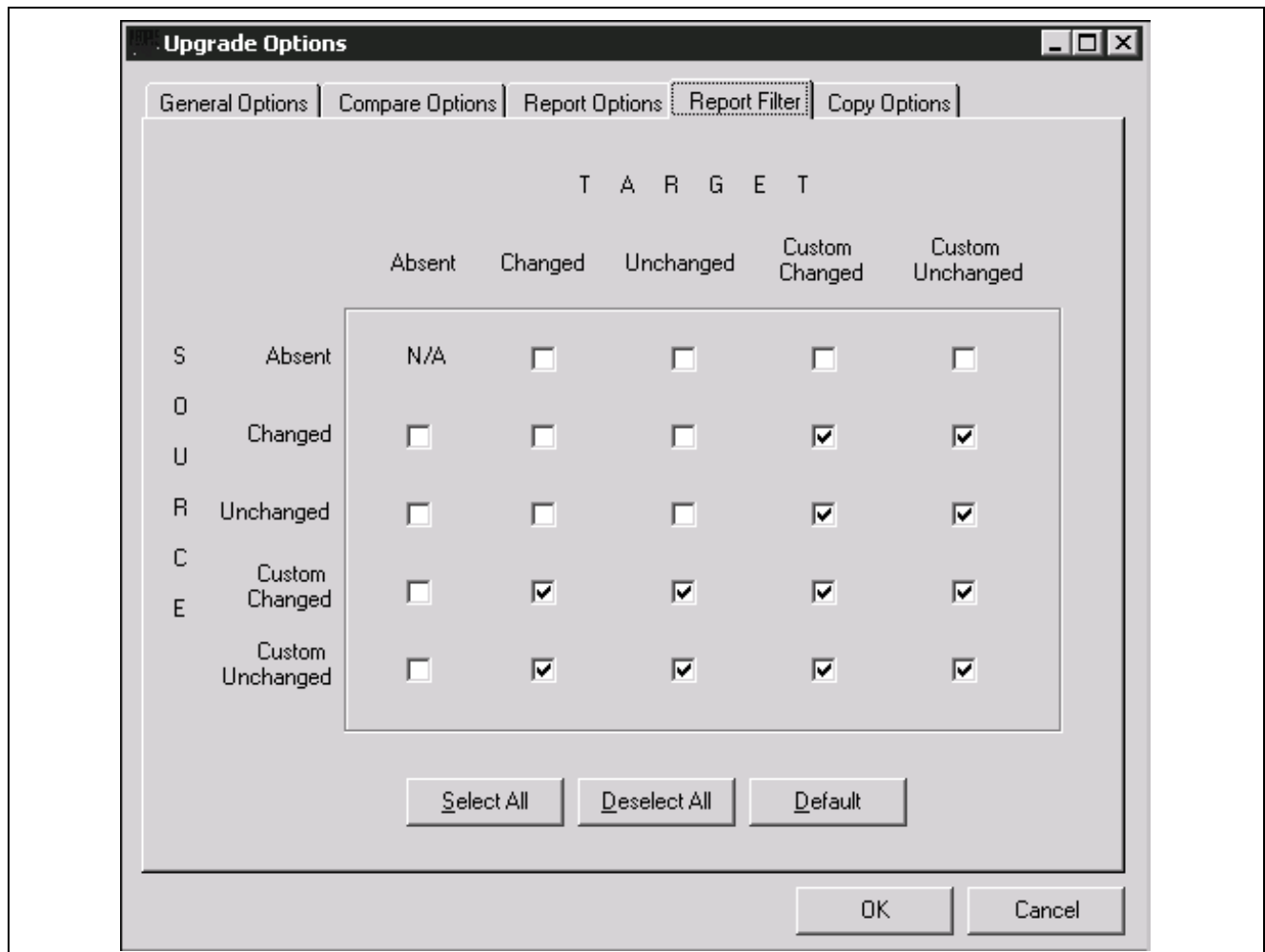
4. Click Options.

5. Select the Report Filter tab.

The default options include your custom changes on the reports.

6. Change the default options as necessary and click OK.

This example shows the Report Filter page of the Upgrade Options dialog box, with several options selected.



Upgrade Options page, Report Filter tab

7. In the Compare and Report dialog box, click OK.
8. In the Step Definitions dialog box, click OK.
9. Repeat steps 2 through 8 for the Running the New Release UPGCUST Compare and Creating the UPGIB Project steps.
10. Select File, Save Job.

Properties

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

Task 1-3-5: Optimizing the Create and Alter Process

During the initial pass, you generate and sometimes edit, then execute the SQL scripts to create and alter tables. In the Move to Production pass, you may be able to skip the SQL script generation steps and use the SQL that you previously generated and edited. This practice may save time in your critical go-live window and is the ultimate goal but it is an incremental process to get to that point.

In the first Move to Production pass, everyone must generate the SQL scripts. There are small differences between the initial and Move to Production passes that require the SQL to be regenerated in at least one Move to Production pass. The PeopleSoft Change Assistant templates are delivered with the steps set this way.

In subsequent Move to Production passes, you may choose to turn off the generation steps if possible. If you have not changed any records at the end of one Move to Production pass then you can use that SQL in your next pass. If you have done anything to change records, you need to generate the SQL scripts again. This includes changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.47 or 8.48), applying updates from My Oracle Support that involve record changes, or making additional customizations to records.

If you chose to skip regenerating the scripts, mark each step complete in your PeopleSoft Change Assistant job. You can also modify the step properties in the template so the step will never show up in any future Move to Production job.

To modify the step properties:

1. Double-click the step to open the step properties dialog box.
2. Change the Type of Upgrade to *Initial Upgrade*.

In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. PeopleSoft Change Assistant looks for the SQL scripts in the output directory set on the job's Database Configuration. Therefore, ensure that PeopleSoft Change Assistant will find the SQL scripts when it tries to run them.

The steps you may choose to skip regenerating the scripts are:

- Creating New Tablespaces
- Creating the Upgrade Projects
- Editing the Create and Alter Scripts

Properties

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

Task 1-4: Identifying Customizations

In this task, identify your modifications to Mass Change, EDI, Message Catalog, SQR Strings, XML Service Information, Verity-Based Indexes, Setup Manager data, Pagelet Wizard objects, and related-language system data, so that you can reload them later in the upgrade process.

Important! If you use any of the features listed above, you must analyze your data because the upgrade replaces the data in the Target database with the delivered data in the New Release Demo database.

The upgrade tasks will replace all Mass Change processes, Verity-Based Indexes, and Setup Manager data. Only modifications to delivered Pagelet Wizard objects will be overwritten because any non-delivered custom Pagelet Wizard objects will be preserved during the upgrade. You cannot print Mass Change code. Be sure that you have extracted your modifications to reapply them later. You must extract your modifications, using cut and paste, to a file for manual reapplication later. EDI tables must be handled in the same way. Reload additional data and review customizations in Oracle-delivered data.

Message sets 0-19,999 will be overlaid during the upgrade, so any customizations that you made in this range will be lost. In addition, all SQR strings will be replaced. To save your customizations, cut and paste your changes to a file and manually reapply them.

Be aware that the data loaded by the PeopleSoft software must not be overwritten.

If you have multiple languages loaded, you should save any custom data that you have in related-language tables for system data. For these tables, data will be exported from the New Release Demo database when you export related-language system data, and imported to your Copy of Production when you import related-language system data. The import may delete your custom data, depending on the import option.

The tables that need to be reviewed are listed in the following scripts. These scripts can be found in your new release *PS_HOME\SCRIPTS* directory.

Important! These scripts are delivered with and run from your new PeopleSoft release. These scripts are *not* run in this task. You will run these scripts later in the upgrade process.

Review the tables that will be overwritten in the scripts listed in this table:

Tables	Script
Message Catalog	DLUPX01E.DMS
SQR Strings	DLUPX04E.DMS
EDI	DLUPX05E.DMS
Mass Change	DLUPX06E.DMS
XML Service Information	DLUPX13E.DMS
Setup Manager, Verity Based Indexes, and Optimization Models	DLUPX16E.DMS
Pagelet Wizard	DLUPX14E.DMS

If your database contains translations, review the list of related-language system data tables that will be exported and imported in these scripts:

DLPFLASYSE.DMS

DLPFLASYSI.DMS

Note. Move to Production: Once you have reapplied these customizations at the end of your Initial upgrade pass, you will not need to apply them again. The affected tables are moved from the old Copy of Production to the New Copy of Production by the scripts listed in the following table:

Tables	Scripts
Mass Change	MVAPPEXP.DMS MVAPPIMP.DMS

Tables	Scripts
EDI	MVPRDEXP.DMS MVPRDIMP.DMS
Strings	MVAPPEXP.DMS MVAPPIMP.DMS
Messages	MVAPPEXP.DMS MVAPPIMP.DMS
XML Service Information	MVPRDEXP.DMS MVPRDIMP.DMS
Setup Manager, Verity Based Indexes, and Optimization Models	MVAPPEXP.DMS MVAPPIMP.DMS
Pagelet Wizard	MVUPX16E.DMS

See Also

"Applying Application Changes," Loading Data for Data Conversion.

"Applying Application Changes," Loading Data to Complete System Setup.

Properties

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

Task 1-5: Backing Up Demo Databases

This section discusses:

- Backing Up the Copy of Current Demo
- Backing Up the New Release Demo

Task 1-5-1: Backing Up the Copy of Current Demo

Back up your Copy of Current Demo database now. This upgrade requires you to run scripts on this database. Before the upgrade starts, you need to take a backup of this environment to preserve your Oracle-delivered demo implementation.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Copy of Current Demo	Initial	All	All	All

Task 1-5-2: Backing Up the New Release Demo

Back up your New Release Demo database now. This upgrade requires you to run scripts on this database. Before the upgrade starts, you need to take a backup of this environment to preserve your Oracle-delivered demo implementation.

Properties

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

CHAPTER 2

Preparing Your Database for Upgrade

This chapter discusses:

- Understanding Database Preparation
- Applying Upgrade Planning Files
- Editing Upgrade Planning DB2 Scripts
- Updating Statistics
- Running Initial Audit Reports
- Evaluating Global Consolidations Entries
- Running GC Journal Publish Rule Query
- Running Application Information Queries
- Upgrading Project Request IDs
- Preparing to Upgrade OBJECTOWNERIDs
- Defining Defaults for the OWE Upgrade
- Identifying Custom Object Types
- Performing Budgeting Application Activities
- Reviewing Table Row Counts
- Preparing Your Database
- Comparing Customizations
- Preparing for the Application Upgrade
- Backing Up After Preparing Your Database

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 2-1: Applying Upgrade Planning Files

This section discusses:

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

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 2-1-1: Applying the UPGOPT Project

In this step, apply the UPGOPT project to your Copy of Production database using the Copy Project from File process.

To apply the UPGOPT project:

1. Using your current codeline, launch PeopleSoft Application Designer and sign in 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 UPGOPT in the Projects box, and then click Select.
5. Click Copy.

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

Properties

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

Task 2-1-2: Building the UPGOPT Project

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

To build the UPGOPT project:

1. Using your current codeline, launch PeopleSoft Application Designer and sign in 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 *UPGOPT* 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 previous step.
Run the scripts in the following order: Create Tables, Create Views, Create Indexes.

Properties

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

Task 2-1-3: Setting Up Upgrade Planning Security

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

To set up security:

1. From the Go menu, select PeopleTools, Security, Permission & Roles, Permission Lists.
2. Select the permission list for the users who will be reviewing and setting up functional requirements for the upgrade.
3. Select the Pages tab.
4. Select or insert the menu name UPG_EC, and click Edit Components.
5. Click Select All, then OK.
6. Select File, Save.
7. Select the Query tab.
8. Select Access Group Permissions.
9. Add one row with the Tree Name QUERY_TREE_EW and the Access Group GEN_ACCESS_GROUP.
10. Select OK, Save.

Properties

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

Task 2-2: Editing Upgrade Planning DB2 Scripts

Perform this step only if your database platform is DB2 z/OS. DB2 z/OS scripts that create tables need a `set current sqlid` statement so that the tables are created with the correct owner ID. Open each script listed here, then uncomment and modify all of the DB2-specific statements to reflect your environment.

For SQL scripts, if the script does not contain DB2-specific statements, add the following line to the top of the script and edit it for your environment, inserting the appropriate owner ID in uppercase characters:

```
set current sqlid = 'OWNER_ID';
```

For Data Mover scripts (DMS), if the script does not contain DB2-specific statements, add the following line to the top of the script and edit it for your environment, inserting the appropriate owner ID in uppercase characters:

```
set execute_sql set current sqlid = 'OWNER_ID';
```

The following is a list of scripts that you need to edit:

```
PUUPX07.DMS
PUBGN02I.DMS
PUECX01.DMS
```

Properties

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

Task 2-3: Updating Statistics

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

See *Getting Started on Your PeopleSoft Upgrade*, "Appendix: Improving Performance."

Properties

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

Task 2-4: Running Initial Audit Reports

This section discusses:

- Understanding Running Initial Audit Reports
- Running the Initial DDDAUDIT Report
- Running the Initial SYSAUDIT Report
- Creating the INITALTAUD Project
- Running the Initial Alter Audit
- Reviewing the Initial Audits

Understanding Running Initial Audit Reports

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

Task 2-4-1: Running the Initial DDDAUDIT Report

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

In this step, DDDAUDIT is run using SQR from your current (old) PeopleSoft release against the Copy of Production to ensure that you are starting with a clean database.

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

See Reviewing the Initial Audits.

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

Properties

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

Task 2-4-2: Running the Initial SYSAUDIT Report

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

In this step, SYSAUDIT is run using SQR from your current (old) PeopleSoft release against the Copy of Production to ensure that you are starting with a clean database.

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

See Reviewing the Initial Audits.

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

Properties

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

Task 2-4-3: Creating the INITALTAUD Project

This section discusses:

- Understanding Creating the INITALTAUD Project
- Running the Step Creating the INITALTAUD Project Automatically
- Creating the INITALTAUD Project

Understanding Creating the INITALTAUD Project

In this step, you create the INITALTAUD project and use it to run your initial Alter Audit. Creating this new project now ensures that all of the records with type *Table* in your system are audited. This project also includes any custom records that you created in your system.

If your old PeopleSoft PeopleTools release is 8.44 or later, you can run this step automatically in PeopleSoft Change Assistant. To run this step automatically, proceed to “Running the Step Creating the INITALTAUD Project Automatically.” If your old PeopleSoft PeopleTools release is earlier than 8.44, proceed to “Creating the INITALTAUD Project.”

Running the Step Creating the INITALTAUD Project Automatically

To run the step Creating the INITALTAUD Project automatically:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Running Initial Audit Reports, right-click the step Creating the INITALTAUD Project, and then select Step Properties.
3. In the Step Properties dialog box, change the value in the Type field from *ManualStop* to *CreateProject*.
4. Click OK.
5. Select Edit, Run.

Creating the INITIALAUD Project

To create the INITIALAUD project:

1. Launch PeopleSoft PeopleTools and sign in to the Target database.
2. From PeopleSoft Application Designer, select File, New...
3. Select Project, and then click OK.
4. Select Insert, Definitions into Project...
5. Select *Records* from the Object Type drop-down list box.
6. Select *Table* from the Type drop-down list box.
7. Click Insert, and then click Select All.
8. Click Insert, and then click Close.
9. Select File, Save All.
10. Enter the project name *INITALTAUD*.

Warning! You must name the project *INITALTAUD* or the next step will fail.

11. Click OK.

Properties

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

Task 2-4-4: Running the Initial Alter Audit

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

Properties

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

Task 2-4-5: Reviewing the Initial Audits

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

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

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

The Alter Audit produces the scripts INITIALTAUD_ALTTBL.SQL, INITIALTAUD_CRTIDX.SQL, and INITIALTAUD_CRTTRG.SQL. These scripts contain SQL that corrects any discrepancies between your PeopleSoft PeopleTools record definitions and the database system catalog table definitions. Review the Alter Audit output and correct any discrepancies.

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

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

Note. You will rerun the DDDAUDIT and SYSAUDIT SQR scripts later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to rename the files manually after completing this task.

Note. Additionally, you may choose to clean up the discrepancies listed in these audits directly in production if they are also an issue in your production database.

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

Properties

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

Task 2-5: Evaluating Global Consolidations Entries

This section discusses:

- Enabling Global Consolidations Queries
- Running Global Consolidations Queries

In the new PeopleSoft release, some records may be duplicated during the upgrade. In this task, you will run queries that will help you determine if you have duplicate entries for these records. If a record has been duplicated, you can modify your data to avoid the duplication. If you don't make the modifications, the upgrade will take the first row from the duplicated result in the process.

The following table lists the queries, with their descriptions, that you will use in this task:

Query Name	Description
UPG_GC_CURR_RULE	Evaluates duplicated rows for the upgrade of GC_CURR_RULE.
UPG_GC_OWNSET_DUPS	Evaluates duplicate rows for the owner rule set (GC_OWN_RSET_DTL) rows from equitization and NCI rule set.
UPG_GC_MODEL_DEFN1	Evaluates Oracle's PeopleSoft Enterprise Global Consolidations (GC) model and currency groups derived from ledger preparation group and ledger preparation rules. This query may show several different currency groups for each PeopleSoft Global Consolidations model.
UPG_GC_MODEL_DEFN2	Evaluates PeopleSoft Global Consolidations model and currency groups derived from ledger preparation group and ledger preparation rules. This query will show the one currency group assigned by the upgrade process to each PeopleSoft Global Consolidations model.

Task 2-5-1: Enabling Global Consolidations Queries

To enable PeopleSoft Global Consolidations user queries:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_GC in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_GC link from the grid.
5. Click the GC_ACCESS_GROUP, SETUP_TABLES, COMMON_DEFINITIONS link.
6. If you do not see a record for GC_MODEL_DEFN under COMMON_DEFINITIONS, then:
 - a. Click the Insert Child record icon next to COMMON_DEFINITIONS.
 - b. On the Add Child Record page, enter GC_MODEL_DEFN in the Record (Table) Name field.
 - c. Click the Add button.
7. Click the GC_ACCESS_GROUP, SETUP_TABLES, LEDGER_PREPARATION, LEDGER PREPARATION link.
8. If you do not see a record for GC_MAP_GRP_DETL under LEDGER PREPARATION, then:
 - a. Click the Insert Child record icon next to LEDGER PREPARATION.
 - b. On the Add Child Record page, enter GC_MAP_GRP_DETL in the Record (Table) Name field.
 - c. Click the Add button.
9. Click the GC_ACCESS_GROUP, SETUP_TABLES, LEDGER_PREPARATION, LEDGER PREPARATION link.

10. If you do not see a record for GC_MAP_SET_DETL under LEDGER PREPARATION, then:
 - a. Click the Insert Child record icon next to LEDGER PREPARATION.
 - b. On the Add Child Record page, enter GC_MAP_SET_DETL in the Record (Table) Name field.
 - c. Click the Add button.
11. Click the GC_ACCESS_GROUP, SETUP_TABLES, LEDGER_PREPARATION, CURRENCY CONVERSION link.
12. If you do not see a record for GC_CURR_GRP_DTL under CURRENCY CONVERSION, then:
 - a. Click the Insert Child record icon next to CURRENCY CONVERSION.
 - b. On the Add Child Record page, enter GC_CURR_GRP_DTL in the Record (Table) Name field.
 - c. Click the Add button.
13. Click the GC_ACCESS_GROUP, SETUP_TABLES, LEDGER_PREPARATION, CURRENCY CONVERSION link.
14. If you do not see a record for GC_CURR_RULE under CURRENCY CONVERSION, then:
 - a. Click the Insert Child record icon next to CURRENCY CONVERSION.
 - b. On the Add Child Record page, enter GC_CURR_RULE in the Record (Table) Name field.
 - c. Click the Add button.
15. Click the GC_ACCESS_GROUP, SETUP_TABLES, COMMON_DEFINITIONS, OWNERSHIP_SETS link.
16. If you do not see a record for GC_OWN_SET_TBL under OWNERSHIP_SETS, then:
 - a. Click the Insert Child record icon next to OWNERSHIP_SETS.
 - b. On the Add Child Record page, enter GC_OWN_SET_DTL in the Record (Table) Name field.
 - c. Click the Add button.
17. Click the GC_ACCESS_GROUP, SETUP_TABLES, EQUITIZATION_RULES link.
18. If you do not see a record for GC_EQTZ_SET_DTL under EQUITIZATION_RULES, then:
 - a. Click the Insert Child record icon next to EQUITIZATION_RULES.
 - b. On the Add Child Record page, enter GC_EQTZ_SET_DTL in the Record (Table) Name field.
 - c. Click the Add button.
19. Click the GC_ACCESS_GROUP, SETUP_TABLES, NCI_RULES link.
20. If you do not see a record for GC_NCI_SET_DTL under NCI_RULES, then:
 - a. Click the Insert Child record icon next to NCI_RULES.
 - b. On the Add Child Record page, enter GC_NCI_SET_DTL in the Record (Table) Name field.
 - c. Click the Add button.
21. Click the GC_ACCESS_GROUP, SETUP_TABLES, LEDGER_DEFINITION link.
22. If you do not see a record for PF_LED_DEFN_TBL under LEDGER_DEFINITION, then:
 - a. Click the Insert Child record icon next to LEDGER_DEFINITION.
 - b. On the Add Child Record page, enter PF_LED_DEFN_TBL in the Record (Table) Name field.
 - c. Click the Add button.

23. Click the Save link above the tree.

Properties

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

Task 2-5-2: Running Global Consolidations Queries

To run the queries to evaluate PeopleSoft Global Consolidations entries:

1. On your Copy of Production database, from the main menu, select Reporting Tools, Query, Query Manager.
2. Run the UPG_GC_CURR_RULE query:

UPG_GC_CURR_RULE

The UPG_GC_CURR_RULE query will return all the keys of the records along with a description. If there is more than one value for the GC_CONSOL_DIM field for the same SETID, GC_CURR_RULE_ID, and EFFDT, you should modify the data from source record (GC_MODEL_DEFN) to get the desired value, or else the upgrade process will pick the first value from the duplicated results to the target record (GC_CURR_RULE).

3. Run the UPG_GC_OWNSSET_DUPS query:

UPG_GC_OWNSSET_DUPS

The UPG_GC_OWNSSET_DUPS query will return the owner set IDs with all the Equitization and NCI rule sets associated to it.

If the upgrade load finds an Equitization rule set and NCI rule set for a given Owner set, it will give precedence to the Equitization rule set and overwrite the NCI rule set.

This query basically gives you the ability to browse through the rule sets that are associated to an Owner set. If the you want to retain the NCI rule set instead of the Equitization rule set, you can retain your selection by deleting the Equitization rule set for that particular Owner set or you can make other appropriate changes to obtain the desired source record.

4. Run UPG_GC_MODEL_DEFN1 query:

UPG_GC_MODEL_DEFN1

The UPG_GC_MODEL_DEFN1 query returns each PeopleSoft Global Consolidations model and its assigned ledger preparation group. It also returns all the currency groups assigned to the ledger preparation rules assigned to the ledger preparation group. Because a ledger preparation group can have several ledger preparation rules and a ledger preparation rule can have several currency groups, this query may return several currency groups for each PeopleSoft Global Consolidations model. The results of query UPG_GC_MODEL_DEFN1 will be compared to the results of the query UPG_GC_MODEL_DEFN2.

Note. If any ledger preparation group has several effective dated rows or if any ledger preparation rule has several effective dated rows, this query may not be accurate. Please manually review each ledger preparation group and ledger preparation rule with effective dated rows to determine the impact of the upgrade process on the currency group.

5. Run UPG_GC_MODEL_DEFN2 query:

UPG_GC_MODEL_DEFN2

The UPG_GC_MODEL_DEFN2 query returns each PeopleSoft Global Consolidations model and one currency group that will be assigned during the upgrade process. The new release moves the currency group from the ledger preparation rule to the PeopleSoft Global Consolidations model. This query shows which currency group will be assigned during the upgrade. Please compare the results of query UPG_GC_MODEL_DEFN1 to the results of query UPG_GC_MODEL_DEFN2. If both queries have the same results, then no action is needed. If query UPG_GC_MODEL_DEFN1 has more rows than query UPG_GC_MODEL_DEFN2, then you need to review or change currency groups, or possibly add new currency groups to provide similar functionality in the new release. The changes can be done before or after upgrade data conversion, but must be resolved before applying the changes to your production database.

Properties

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

Task 2-6: Running GC Journal Publish Rule Query

In the new PeopleSoft release, PeopleSoft Global Consolidations Affiliate and Ledger fields are removed from the journal publish rule. Instead, the user specifies the PeopleSoft Enterprise Warehouse data mapper rule set (or sets) to use with the journal publish rule. The data mapper rule provides mapping capabilities for PeopleSoft Global Consolidations Affiliate, Ledger, and other ChartFields. In this task, you will run a query that displays what was mapped to for the PeopleSoft Global Consolidations Affiliate and Ledger fields. The result will be used in a later task.

See “Completing Database Changes,” Upgrading GC Journal Publish Mapper Rules.

To enable the query:

1. On your Copy Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_GC in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_GC link from the grid.
5. Click the GC_ACCESS_GROUP, SETUP_TABLES, LEDGER_DEFINITION link.
6. If you do not see a record for PF_LED_DEFN_TBL, GC_TMPLT_TBL, and/or GC_PUB_RULE_TBL under LEDGER_DEFINITION, then:
 - a. Click the Insert Child record icon next to LEDGER_DEFINITION.
 - b. On the Add Child Record page, enter PF_LED_DEFN_TBL, GC_TMPLT_TBL, or GC_PUB_RULE_TBL in the Record (Table) Name field.
 - c. Click the Add button.
7. Click the Save link above the tree.

To run the query:

1. On your Copy of Production database, from the Go menu, select Reporting Tools, Query, Query Manager.
2. Run the following query:

```
UPG_GC_PUB_RULE_INFO1
```

The query will return the values for PeopleSoft Global Consolidations Affiliate and Ledger fields for journal publish rules specified on the models based on the ledger template “GCCLEDMGT.”

Properties

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

Task 2-7: Running Application Information Queries

This section discusses:

- Running KPI Manager Queries
- Associating an Employee ID to a User ID

In the new PeopleSoft release, some tables have new structures that require you to review existing data. PeopleSoft has provided you with queries that will assist you in this effort.

In this task, you will run several queries that will help you identify existing data that requires review. If any of these queries return results, you must follow the documented procedures to change existing data so that your upgrade may proceed.

Task 2-7-1: Running KPI Manager Queries

This section discusses:

- Enabling the Scorecard Definition Query
- Running the Scorecard Definition Query

In the new PeopleSoft release, the employee ID field in the Scorecard Definition table has been converted to the user ID field in the new Scorecard Distribution table. In this task, you will run a query that will help you determine which employee IDs are not tied to a user ID in the “Employee ID for a User” table. If your Scorecard employee IDs are not tied to a user ID in the “Employee ID for a User” table, you must complete the step to associate an employee ID to a user ID. The data conversion engine will not correctly upgrade the Scorecard Definition table if you do not make these modifications.

See “Associating an Employee ID to a User ID.”

The UPG_BC_01 query identifies employee IDs that exist in the Scorecard Definition table, but do not exist in the “Employee ID for a User” table.

Enabling the Scorecard Definition Query

To enable the Scorecard definition query:

1. On your Copy of Production database, select PeopleSoft, PeopleTools, Security, Query Security, Query Access Manager.
2. Enter “QUERY_TREE_BSC” in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_BSC link from the grid.
5. Click the BSC_ACCESS_GROUP - BSC_ACCESS_GROUP link.
6. If you do not see record BC_BSC_DFN under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP - BSC_ACCESS_GROUP.
 - a. On the Add Child Record page, enter BC_BSC_DFN in the Record (Table) Name field.
 - b. Click the Add button.
7. Click the BSC_ACCESS_GROUP - BSC_ACCESS_GROUP link.
8. Click the Insert Child record icon next to BSC_ACCESS_GROUP - BSC_ACCESS_GROUP.
9. On the Add Child Record page, enter PF_SY_OPR_EMPL in the Record (Table) Name field.
10. Save the tree.

Running the Scorecard Definition Query

To run the Scorecard definition query:

1. On your Copy of Production database, select Reporting Tools, Query, Query Manager.
2. Run the following Scorecard query:

UPG_BC_01

3. Save the query results.

The query will return all employee IDs from the Scorecard Definition table that do not have a corresponding entry in the “Employee ID for a User” table.

If no rows were returned from the query, all of the scorecard employee ID values are associated to a user ID; skip the rest of this task. If rows were returned, you must fix all rows that were reported by the query.

See the PeopleSoft Enterprise Warehouse PeopleBook for your current release, “Securing Your System,” Assigning Security to Employees and Groups.

Important! You must fix all rows that were reported by the query because you will be unable to alter the affected tables later in the upgrade. Any employee ID values that are not associated to a user ID in the Enterprise Warehouse table may cause errors in the mass compile of the Scorecard definition.

Properties

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

Task 2-7-2: Associating an Employee ID to a User ID

In this step, you will manually associate a Scorecard employee ID to a user ID on the Employee ID for a User ID page.

To associate a Scorecard employee ID to a user ID:

1. On your Copy of Production database, select PeopleSoft, Define Business Rules EPM, Security, Setup Empl ID for a User.
2. For each employee ID returned by the UPG_BC_01 query, perform the following steps:
 - a. Select a user ID in the EmplID for a User search page.
 - b. Click the Search button.
 - c. Enter a value in the SetID field.
 - d. Enter a value in the EmplID field—that is, an employee ID returned in the UPG_BC_01 query.
 - e. Click Save.

Properties

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

Task 2-8: Upgrading Project Request IDs

This section discusses:

- Identifying Duplicate Project Request IDs
- Determining Whether Update Was Applied
- Editing Script for New Project Request IDs
- Running Duplicate Project Request ID Script

In previous PeopleSoft releases, business unit and project request ID were key fields in the BC_PROJ_REQUEST and PROJ_N_REQ_TBL tables, which allowed duplicate project request IDs for different business units. In the new PeopleSoft release, project request ID is now the unique key field. In this task you will run a SQL script that will help you determine whether you have duplicate project request IDs for multiple business units. If you have duplicate project request IDs, you must complete the steps below to modify your data to comply with the new key structure. If you do not make these modifications, the upgrade will fail.

Note. This task is only applicable to customers upgrading from PeopleSoft EPM 8.8 with no service pack applied.

Task 2-8-1: Identifying Duplicate Project Request IDs

This section discusses:

- Enabling the UPG_PPK_PRJ_ID_DUP Query

- Running the UPG_PPK_PRJ_ID_DUP Query

The following PeopleSoft Query object, UPG_PPK_PRJ_ID_DUP, identifies your duplicate project request IDs for multiple business units. It returns all keys of the BC_PROJ_REQUEST and PROJ_N_REQ_TBL tables plus the description field. Save the query result to use in the “Edit Script for New Project Request IDs” step later within this task.

Enabling the UPG_PPK_PRJ_ID_DUP Query

To enable the UPG_PPK_PRJ_ID_DUP query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Open the QUERY_TREE_EW tree.
3. Click the root node, UPG_EPM - EPM Upgrade Access Group.
4. Click the Insert Child Group icon on the right side of the UPG_EPM - EPM Upgrade Access Group.
5. Enter UPG_PPM in the Access Group field.
6. Click the Add button.
7. Enter *PPM Upgrade Access Group* in the Description field.
8. Click OK.
9. Click the UPG_PPM - PPM Upgrade Access Group link.
10. Click the Insert Child record icon on the right side of the UPG_PPM - PPM Upgrade Access Group link.
11. On the Add Child Record page, enter BC_PROJ_REQUEST in the Record (Table) Name field.
12. Click the Add button.
13. Click the Insert Child record icon again on the right side of the UPG_PPM - PPM Upgrade Access Group link.
14. On the Add Child Record page, enter PROJ_N_REQ_TBL in the Record (Table) Name field.
15. Click the Add button.
16. Click Save.

Running the UPG_PPK_PRJ_ID_DUP Query

To run the UPG_PPK_PRJ_ID_DUP query:

1. On your target database, from the PeopleSoft menu, select Reporting Tools, Query, Query Viewer.
2. Run the following query:

```
UPG_PPK_PRJ_ID_DUP
```

3. Save the query results.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Portfolio Mgmt Scorecard	All	All

Task 2-8-2: Determining Whether Update Was Applied

This section discusses:

- Determining Whether the Update Was Applied
- Editing the Script Because No Update Was Applied

Skip this step if no rows were returned when you identified duplicate project request IDs.

See Identifying Duplicate Project Request IDs.

Before you edit run the Data Mover script, PUPPKJ02.DMS, complete this step to determine if the Project Portfolio Management Update/Fix ID 121368 was applied to your system.

If the update has *not* been applied, you may need to edit the Data Mover script so that it can successfully be completed.

Determining Whether the Update Was Applied

To determine if the update has been applied:

1. On your Copy of Production Database, run the following query from your SQL query tool:

```
SELECT COUNT(*) FROM PS_BC_PROJ_SCR
```

2. If the query returns rows, the update has been applied. Skip to “Editing Script for New Project Request IDs,” the step in which you edit the PUPPKJ02.DMS script to specify new project request IDs.
3. If the query does not return any rows, or if the table PS_BC_PROJ_SCR does not exist, then the update has not been applied and you must complete the remainder of this step.

Editing the Script Because No Update Was Applied

If the previous query did not return any rows, complete the following procedure. To edit the project request ID script:

1. Open PUPPKJ02.DMS script from *PS_HOME\SCRIPTS*.
2. In the script, comment out the following statements:

```
UPDATE PS_BC_PROJ_SCR SET PROJECT_ID='NEW_PROJ_ID'
WHERE BUSINESS_UNIT='OLD_PROJ_BU'
AND PROJECT_ID='OLD_PROJ_ID';
UPDATE PS_BC_PROJ_SCR_CMP SET PROJECT_ID='NEW_PROJ_ID'
WHERE BUSINESS_UNIT='OLD_PROJ_BU'
AND PROJECT_ID='OLD_PROJ_ID'
```

3. Save and close the script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Portfolio Mgmt Scorecard	All	All

Task 2-8-3: Editing Script for New Project Request IDs

Skip this step if no rows were returned when you identified duplicate project request IDs.

See Identifying Duplicate Project Request IDs.

In this section you will analyze the duplicate project request ID information to determine which values to retain and which values to rename. You will then edit the PUPPKJ02.DMS script to specify the old and new project request IDs for those being renamed.

First, look at the data returned from UPG_PPK_PRJ_ID_DUP. As an example, let's say it returned the three rows listed in the following table:

BUSINESS_UNIT	PROJECT_ID	DESCRIPTION
CORP1	IT-123456	GSC Expansion
PSOFT	IT-123456	Hosted Training
CAN01	IT-123456	Marketing – Canada

This would indicate that three project requests have the duplicate ID of IT-123456. You would need to decide which one will remain unchanged. For example, let's say you selected CORP1, IT-123456, GSC Expansion. You therefore would edit the PUPPKJ02.DMS script for each of the remaining duplicate rows.

Note. You may want to make a backup of PUPPKJ02.DMS in case an editing error occurs.

To edit the duplicate project request IDs script:

1. Open the script, PUPPKJ02.DMS from your *PS_HOME*\scripts directory.
2. Replace all instances of the string "NEW_PROJ_ID" in the script with a unique value you have decided to rename the project request ID to.

The NEW_PROJ_ID value must be in upper case with a maximum length of 15 characters.

3. Replace all instances of the string "OLD_PROJ_BU" in the script with the Business Unit of the project you are renaming.

The OLD_PROJ_BU value must be in upper case with a maximum length of 5 characters.

For example, using the first chosen project request to rename in the example, you would replace *OLD_PROJ_BU* with *PSOFT*.

4. Replace all the instances of the string "OLD_PROJ_ID" in the script with the project request ID of the project request you are renaming.

The OLD_PROJ_ID value must be in upper case with a maximum length of 15 characters.

For example, using the first chose project request name to rename in the example you would replace *OLD_PROJ_ID* with *IT-123456*.

5. If you have more than one project request ID to rename, then repeat the update statements as needed; specifying your business unit, old project request ID, and new project request ID.
6. Save the script.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Portfolio Mgmt Scorecard	All	All

Task 2-8-4: Running Duplicate Project Request ID Script

Skip this step if you did not have any duplicate project request IDs.

In the previous step you edited the duplicate project request IDs script. Now you will run the edited script to resolve the duplicate project request ID in tables PS_BC_PROJ_REQUEST and PROJ_N_REQ_TBL. Run the script PUPPKJ02.dms that you saved in the step above.

Important! You must fix *all* duplicate project request ID records that were reported by UPG_PPK_PRJ_ID_DUP. Any duplicate project request IDs will cause “duplicate key” error messages when you alter the tables. To verify that you have fixed all rows, rerun UPG_PPK_PRJ_ID_DUP and make sure no rows are returned.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Portfolio Mgmt Scorecard	All	All

Task 2-9: Preparing to Upgrade OBJECTOWNERIDs

This section discusses:

- Loading PeopleSoft OBJECTOWNERID Values
- Identifying Custom PF_OWNER Values
- Editing the Custom PF_OWNER Script
- Loading Custom PF_OWNER Values

In this task, you will load the PS_UPG_OWNER_MAP table, which maps the PF_OWNER to OBJECTOWNERID values. First, the PF_OWNER to OBJECTOWNERID values provided by PeopleSoft will be loaded. Next you will identify and load your custom PF_OWNER to OBJECTOWNERID mappings.

Later in the upgrade, the “Running Data Conversion” task will upgrade the OBJECTOWNERID values using the PS_UPG_OWNER_MAP table.

Task 2-9-1: Loading PeopleSoft OBJECTOWNERID Values

This Data Mover script loads table PS_UPG_OWNER_MAP with PeopleSoft PF_OWNER to OBJECTOWNERID mappings. This table is used during data conversion to map PF_OWNER to appropriate OBJECTOWNERID values. The script name for your upgrade path is:

pupfnownermap.dms

Properties

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

Task 2-9-2: Identifying Custom PF_OWNER Values

Enabling the UPG_OWNER_MAP Query

First, you must enable query security in order to run the PeopleSoft Query objects needed to identify custom PF_OWNER values.

To enable the query security:

1. From the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_EW in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_EW link from the grid.
5. Click the Insert Child Group icon that is next to WB_RECORDS.
6. Enter UPGRADE_GROUP in the Access Group field.
7. Click the Add button.
8. Enter *UPG_OWNER_MAP Upgrade group* in the Description field.
9. Click OK.
10. Click the UPGRADE_GROUP.
11. Click the Insert Child record icon.
12. On the Add Child Record page, enter UPG_OWNER_MAP in the Record (Table) Name field.
13. Click the Add button.
14. Click Save.

Running the UPG_OWNER_MAP Query

Then, to identify customer PF_OWNER values.

1. Run the following PeopleSoft Query:

UPG_OWNER_MAP

This query will identify your custom PF_OWNER values.

2. Save the output of the query because you will use the results in the next step, “Edit the Custom PF_OWNER Script,” and later in the upgrade.

Properties

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

Task 2-9-3: Editing the Custom PF_OWNER Script

If you do not have any custom PF_OWNER values, then skip this step.

In this step, you will add your custom PF_OWNER values and their OBJECTOWNERID mappings to the pupfnownermap03 Data Mover script.

To edit the custom PF_OWNER script:

1. Open the pupfnownermap03.dms from the *PS_HOME*\scripts directory.
2. Edit the INSERT statement to add your first custom PF_OWNER value and the associated OBJECTOWNERID value.
3. Add additional INSERT statements, as needed, for additional custom PF_OWNER-OBJECTOWNERID pairs.
4. Save the script.

Properties

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

Task 2-9-4: Loading Custom PF_OWNER Values

If you do not have any custom PF_OWNER values, then skip this step. In the previous step, you edited the custom PF_OWNER script to work for your custom PF_OWNER values. In this step, you will run the edited script to insert your custom PF_OWNER-OBJECTOWNERID pair values into the PS_UPG_OWNER_MAP table. The script name is:

```
pupfnownermap03.dms
```

Properties

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

Task 2-10: Defining Defaults for the OWE Upgrade

This section discusses:

- Understanding Default Source Information
- Identifying Source System IDs
- Assigning Defaults for the OWE Upgrade

Understanding Default Source Information

This section discusses:

- Considerations for Defining Default Source System IDs
- Considerations for Defining Default Data Origins

In the current release of PeopleSoft EPM, most Operational Warehouse - Enriched (OWE) records have the `LOAD_OWE_SBR` sub-record. The purpose of this record is to identify the origin of the data (whether it is from a transaction database, from PeopleSoft EPM, or from some other source), the load time, and the batch ID to which the data load process belongs. Previous PeopleSoft EPM releases do not have this feature.

Since a PeopleSoft EPM instance could potentially extract its data from various databases, including a different instance of PeopleSoft EPM, it is very important that you carefully define default source system IDs and data origins for your upgrade. A source system ID is the identifier for a specific source database in your PeopleSoft EPM database. The data origin flag is used to segregate source system data originating in a source database from simulated data produced in PeopleSoft EPM via pages or AE. The PeopleSoft EPM PeopleBooks contain additional information on source system IDs.

See the PeopleSoft EPM Foundation for Analytical Application and Performance Management Warehouse PeopleBook for your new release, “Setting Up EPM Foundation,” Understanding Source System Data and EPM Foundation.

Considerations for Defining Default Source System IDs

The ideal default source system ID is the predominant source database for your PeopleSoft EPM database. The predominant source implies that the database supplies the most critical data to your PeopleSoft EPM Warehouse.

If you have only one source for your PeopleSoft EPM database, then you use that source’s identifier. In certain circumstances where you have multiple source databases supplying data to your PeopleSoft EPM database, then you have to choose one source as your default source system ID. However, you could override this default for each OWE table with a different source system ID. For example: If source `SRC1` supplies most of the data to your PeopleSoft EPM database, then use `SRC1` as your default source system ID. However, if source `SRC2` is the predominant source for the `PRODUCT_D00` table, then you can define a table-specific default source system ID for `PRODUCT_D00` as `SRC2`. This table-specific source system ID is also referred to as a “default” since an individual row in the table could have a source other than the table-defined default.

Important! Bear in mind that either the global default or the table-specific default applies to all the data in each OWE table, regardless where the data was originally created. If the data in your table is a mix of data from multiple sources, or created in PeopleSoft EPM via pages or AE, then no single default source system ID will adequately describe the real source for the upgraded data. When you use a predominant source system ID as your default, it removes most issues with upgraded data even when your PeopleSoft EPM database takes data from multiple sources. However, depending on your upgrade situation, a re-population of OWE could be considered.

Considerations for Defining Default Data Origins

There are three possible values for data origin:

- S = Data originates from a source system and should not be modified by PeopleSoft EPM pages.
- E = Data originates in the PeopleSoft EPM system and can be modified by PeopleSoft EPM pages.
- M = Data originates from a source system but has some attributes that can be modified by PeopleSoft EPM pages.

The ideal default data origin is E because you do not know the origin of data already in your PeopleSoft EPM database from previous releases of PeopleSoft EPM. Setting the default data origin to E ensures that any update to the upgraded data will make it to subsequent layers of the PeopleSoft EPM warehouse, such as MDW. Setting it to a non-E value will cause any changes that you make to the data via PeopleSoft EPM pages to be ignored in subsequent layers of the PeopleSoft EPM warehouse.

Just as with the source system ID, you have the option to override the default data origin for each OWE table. You may want to do this if you know the data in some of your OWE tables is never changed from within the PeopleSoft EPM database

Important! Bear in mind that this default applies to all the data in each OWE table. When you use E as your default data origin, it removes most issues with upgraded data even when your PeopleSoft EPM database takes data from multiple sources. However, depending on your situation, a re-population of OWE could be considered.

Task 2-10-1: Identifying Source System IDs

Before you can use a source system ID as a default, you have to identify it first so that when you assign your defaults for upgrade, you can choose from the predefined list of source system IDs. This is different from defining the source system IDs that you will do later in the upgrade, when you define the detailed information for each source system ID.

See “Completing Database Changes,” Defining Source System IDs.

In this step, you will identify source system IDs for your upgrade on your Copy of Production database. You must have itemized all of your source databases for your PeopleSoft EPM database and assign IDs to those databases before you start this task.

To identify your source system IDs:

1. From the Home menu, select Upgrade Setup, Upgrade Source System ID.
2. Select Add New Value.
3. Specify the ID of your source database.
4. Select Add.
5. Enter a description for the source system ID.
6. Select Save.
7. Repeat steps 3 through 6 until all your source database system IDs are specified.

Properties

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

Task 2-10-2: Assigning Defaults for the OWE Upgrade

In this step, you will assign the default source system ID and the default data origin on your Copy of Production database for upgrade.

To assign the defaults:

1. From the Home menu, select Upgrade Setup, Upgrade EWC Defaults.
2. Define your default source system ID and data origin for the entire upgrade.
You can only select a source system ID from those that you specified in the previous step.
3. For any table-specific overrides, specify the table name, the source system ID, and the data origin for that table.
4. Repeat step 3 until all your table-specific overrides are defined.
5. Save the definition of default source systems.

Properties

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

Task 2-11: Identifying Custom Object Types

This SQL script will identify your custom object types. Save the output of the script because you will use the results later in the upgrade. The script name for your upgrade path is:

```
PUPFNOBJTYPE02.SQL
```

Properties

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

Task 2-12: Performing Budgeting Application Activities

This section discusses:

- Checking In Budgeting Activities
- Exporting Line Item Budgeting Data
- Analyzing the Impact of BP_CF9B_AK_SBR Changes

Task 2-12-1: Checking In Budgeting Activities

Before starting the upgrade, make sure that all the Budgeting activities are checked in. Also, make sure that no one is accessing the analysis pages or running any online or batch process that might result in a checkout. For some of the tables that store data on check out, the key structure has changed in the new release. There should be no data in these tables during the upgrade. This step ensures that these tables are empty before the upgrade.

To check in all Budgeting activities, use the Enterprise Warehouse Checkout Administration page:

1. Select Enterprise Warehouse Processing, Define BAM Environment, Checkout Administration.
2. Select Model Checkout Administration.
3. Select the BAM model ID.
4. Click the Cleanup All Checkouts button.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Planning and Budgeting	All	All

Task 2-12-2: Exporting Line Item Budgeting Data

If you want to use any of the existing line item budgeting data after upgrade to the new release, run the Export to GL (BPEXPORT) process before starting the upgrade. This process populates the appropriate ledger tables in the Budgeting and General Ledger databases. Once data is available in the ledger tables, this data can be used for Budgeting in the new release with the proper setup.

Note. Asset and position activity data added in Budgeting cannot be reused.

To run the Export to GL (BPEXPORT) process:

1. Select Budgeting Home, Data Integration, General Ledger Integration, Export to General Ledger.
2. Run the Export to General Ledger process.

See the PeopleSoft Enterprise Planning and Budgeting PeopleBook for your new release, “Integrating With Other Applications.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Planning and Budgeting	All	All

Task 2-12-3: Analyzing the Impact of BP_CF9B_AK_SBR Changes

For the new release, in the PeopleSoft Planning and Budgeting application, the following five fields changed to non-key fields on the BP_CF9B_AK_SBR subrecord:

- AFFILIATE_INTRA1
- AFFILIATE_INTRA2
- CHARTFIELD1
- CHARTFIELD2
- CHARTFIELD3

Not all fields on the BP_CF9B_AK_SBR subrecord can be activated as key fields. On the DB2 z/OS database platform, indexes have a limit of 255 characters. On the Oracle database platform, indexes can only have 32 index columns. If all dimensions were activated, then some indexes would exceed these limits and would not be created.

In this step, you need to analyze your data stored in records that utilize this subrecord and determine which of the above fields may need to remain as key fields in order to prevent any duplicate key errors later in the upgrade process. If your database platform is DB2 z/OS or Oracle, you must also make sure that you stay within the constraints dictated by those platforms. In the chapter “Applying Application Changes,” you will be asked to set the fields that you want to remain as keys, as determined in this step.

For details on changing the choice of fields to be used as keys, see the PeopleSoft Enterprise Planning and Budgeting PeopleBook, “Setting Up the System,” Activating Inactive Dimensions.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	Planning and Budgeting	All	All

Task 2-13: Reviewing Table Row Counts

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

Properties

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

Task 2-14: Preparing Your Database

This section discusses:

- Understanding Database Preparation
- Verifying Database Integrity
- Cleaning the PSOBJCHNG Table
- Purging Message Queues
- Dropping PeopleTools Tables
- Cleaning Up PeopleTools Data
- Shrinking Images

Understanding Database Preparation

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

Task 2-14-1: Verifying Database Integrity

Have a database consistency check performed on your Target database to ensure that it is clean and to minimize any potential upgrade errors due to possible database corruption. Work with your database administrator to ensure that the check that is run is similar to the one shown for your database platform in the following table.

This table lists database platforms and commands to run a database consistency check:

Platform	Command
DB2 UNIX/NT	db2dart
Informix	oncheck
Microsoft SQL Server	DBCC CHECKDB
Oracle	dbv
Sybase	DBCC CHECKDB

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	All	DB2 UNIX/NT Informix MS SQL Server Oracle Sybase	All

Task 2-14-2: Cleaning the PSOBJCHNG Table

This step deletes all data stored in the PSOBJCHNG table, which contains all renamed records and fields. The data stored in the PSOBJCHNG table must be deleted before starting your upgrade. The build process looks in this table when running alter renames. PeopleSoft Change Assistant will execute the following SQL:

```
DELETE FROM PSOBJCHNG
```

Note. Move to Production: If you rename records or fields later in your upgrade, you should expect to see rows in the PSOBJCHNG table at the end of the upgrade pass. During the Move to Production these rows will be copied from your old Copy of Production to your new Copy of Production. Thus, this step is not necessary during Move to Production.

See “Applying Application Changes,” Modifying the Database Structure.

Properties

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

Task 2-14-3: Purging Message Queues

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

This step runs the following PeopleSoft Data Mover script (DMS), found in the *PS_HOME\SCRIPTS* directory of your old release codeline, on your Copy of Production database to purge your message queues:

```
APPMSGPURGEALL.DMS
```

Warning! A script of the same name is found in the codeline of the release to which you are upgrading. Do not use this script; it will not run successfully.

Properties

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

Task 2-14-4: Dropping PeopleTools Tables

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

Drop the following tables:

- PSOPTIONS_TMP
- PSLANGUAGES_TMP
- PS_PSMCFQUEUESLANG

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

- PSOPTSTATUS

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

Properties

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

Task 2-14-5: Cleaning Up PeopleTools Data

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.46, 8.47, 8.48, or 8.49. In this step, you modify or delete PeopleSoft PeopleTools data prior to performing the PeopleSoft PeopleTools upgrade. This is necessary so that tables can be altered and indexes can be created successfully later in the upgrade.

If you are upgrading from PeopleSoft PeopleTools 8.46, 8.47, 8.48, or 8.49, follow the instructions in this step.

PSLOCALEORDER has three fields defined: ISO_LOCALE, SEQNUM, and ISO_LOCALE_CHILD. This table is used internally by PeopleSoft PeopleTools to prioritize locales when consuming a remote WSRP service description. Priority is defined by the SEQNUM field.

See Enterprise PeopleTools PeopleBook: PeopleTools Portal Technology, Appendix: "Language Support For Consuming and Producing Remote Portlets."

As of PeopleSoft PeopleTools 8.50, a unique index with the keys ISO_LOCALE and SEQNUM will be created for the PSLOCALEORDER table. You need to ensure that PSLOCALEORDER does not contain any duplicates so that the unique index can be created successfully later in the upgrade. To determine whether you have any rows of data that share the same set of values for ISO_LOCALE and SEQNUM, run the following SQL:

```
SELECT ISO_LOCALE, SEQNUM, COUNT(SEQNUM) AS NUMBER_OF_DUPLICATE_ROWS FROM⇒
PSLOCALEORDER GROUP BY ISO_LOCALE, SEQNUM HAVING COUNT(SEQNUM) > 1;
```

This SQL will return the number of duplicate rows that share the same set of values for ISO_LOCALE and SEQNUM. If any rows are returned, decide which row of data you want to keep and delete the other rows. After deleting the duplicate rows, re-run the above SQL to verify that no further duplicates exist.

Properties

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

Task 2-14-6: Shrinking Images

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

To shrink images using a PeopleSoft PeopleTools release later than 8.44.14:

1. Launch Configuration Manager and select the Profile tab.
2. Select the profile for the upgrade database and click Edit.
3. Select the Common tab.
4. Select the option that is labeled either Convert and Shrink Images to Image Size Limit, or Convert DIB and BMP images to JPG.
5. Click OK.

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

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

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

```
-- CREATE A TABLE TO HOLD THE CONVERTED IMAGE
CREATE TABLE PS_CONVIMG (CONTNAME VARCHAR2(30), IMAGESIZE BLOB);
-- LOAD CONVERTED DATA INTO THE TABLE
INSERT INTO PS_CONVIMG SELECT CONTNAME,TO_LOB(CONTDATA) FROM PSCONTDEFN;
-- RETRIEVE IMAGES OVER 32K
```

```
SELECT CONTNAME, DBMS_LOB.GETLENGTH(IMAGE_SIZE) IMAGE_SIZE FROM PS_CONVIMG WHERE⇒
DBMS_LOB.GETLENGTH(IMAGE_SIZE) > 32768;
```

To manually save images greater than 32 KB:

1. In PeopleSoft Application Designer, insert your images into a project.
Select Insert, Definitions into Project.
2. Save the project.
3. Copy the images to file.
Select Tools, Upgrade, Copy Project to File.
4. Delete the rows for the images in your project from the PSCONTDEFN table.
5. When you are finished with the upgrade, copy the project from file to restore your custom images.
Select Tools, Upgrade, Copy Project from File.

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

Properties

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

Task 2-15: Comparing Customizations

This section discusses:

- Running the UPGCUST Compare
- Running the UPGCUST Filter Script
- Reviewing the UPGCUST Compare Log

Note. In this task, you identify customizations on the Copy of Production by running a database compare against the Copy of Current Demo database.

Task 2-15-1: Running the UPGCUST Compare

This step creates a project on your Copy of Production database called UPGCUST and executes a database compare of all comparable object types. This compare is run to identify all customizations on the Copy of Production database. The database compare occurs between your Copy of Production and the Copy of Current Demo database. The following comparable object types are omitted from the comparison:

- Application package PeopleCode
- Application packages
- File reference type codes
- IB queues

- Java portlet user preferences
- Message catalog entries
- Message PeopleCode
- Messages
- Message schemas
- Portal registry user favorites
- Portal registry user home pages
- Service operation routings
- Service operations
- Service operations handlers
- Service operation versions
- Services
- WSDL

Message catalog entries are exported and imported with PeopleSoft Data Mover in a later step. Portal registry user home pages, portal registry user favorites, file reference type codes, and Java portlet user preferences remain in the Copy of Production environment and are not copied from the New Release Demo database. Integration Broker objects will be compared later in the upgrade.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Copy of Current Demo	Initial	All	All	All

Task 2-15-2: Running the UPGCUST Filter Script

This step removes all objects from the UPGCUST project that are not marked **Changed* or **Unchanged* in your Copy of Production environment. This step is used to isolate only custom objects in the UPGCUST project.

The script name for your upgrade is:

PUUPX99.DMS

See Appendix: “Using the Comparison Process.”

Properties

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

Task 2-15-3: Reviewing the UPGCUST Compare Log

In this step, review the log file and compare reports generated by the database compare in the previous step to ensure that it completed successfully. A detailed analysis of these compare reports is not necessary. Later in the upgrade, you will review a new set of compare reports when customizations are compared to the New Release Demo database.

Properties

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

Task 2-16: Preparing for the Application Upgrade

This section discusses:

- Creating a Copy of RecField Definitions
- Creating a Copy of DBField Definitions
- Exporting Copy of SET_CNTRL_REC
- Importing Copy of SET_CNTRL_REC
- Running the PUUPJ01 Drop Table Script
- Running the PUBGN01 Drop Table Script
- Running the PUPPKN01 Drop Table Script
- Running the PUFTN01 Drop Table Script
- Running the PUPFX01 Drop Table Script
- Loading the Alter Analyzer Data
- Deleting Old Pagelet Wizard Data

Task 2-16-1: Creating a Copy of RecField Definitions

This step creates a copy of the contents of PSRECFIELD, before the upgrade is begun. It is used by the data conversion code to determine the structure of tables that may have been impacted by fixes that you applied.

Note. If you upgraded your system before, you may need to drop PSRECFIELD_TMP prior to running this script.

The script name is:

PUUPX07.DMS

Properties

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

Task 2-16-2: Creating a Copy of DBField Definitions

The PeopleSoft Enterprise Warehouse - Content (EWC) upgrade needs to know not only the record structure of the current database prior to upgrade but also the field data type to facilitate upgrade with Application Engine. Therefore, the current database field type PeopleSoft PeopleTools metadata table must be copied to a temporary table. The temporary table will be referenced later in the upgrade during data conversion.

To copy PSDBFIELD to a temporary table, run the following script:

```
PUECX01.DMS
```

Properties

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

Task 2-16-3: Exporting Copy of SET_CNTRL_REC

The Budgeting Center table and the Scorecard Assessment Groups table have been deprecated in the new release. The data from these tables is being migrated to new tables. To successfully convert data from the old tables to the new tables, you will need to copy data from the PeopleSoft PeopleTools set control record to a temporary table. The temporary table will be referenced later in the upgrade during data conversion.

To export set control record data to the temporary table, run the following script:

```
PUBGN02E.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Planning and Budgeting All Scorecard Products	All	All

Task 2-16-4: Importing Copy of SET_CNTRL_REC

This script imports set control record data to a temporary table. The script name for your path is:

```
PUBGN02I.DMS
```

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Planning and Budgeting All Scorecard Products	All	All

Task 2-16-5: Running the PUUPJ01 Drop Table Script

In this step, you will drop table PS_SALES_PERSN_TBL, which has been changed to a view in the new release. This table must be dropped to prevent errors in the step Building the Create and Alter Scripts. This table contains OWS data, which is not needed for the application and is not upgraded.

See "Applying Application Changes," Modifying the Database Structure, Building the Create and Alter Scripts.

Note. This task is only applicable to customers upgrading from PeopleSoft EPM 8.8 with no Service Pack applied. If this step applies to your upgrade path, you may wish to automate it. Select the step in Change Assistant, open the Step Properties dialog box, change the Type from *ManualStop* to *DataMoverUser*, and click OK twice.

To drop the table, run the following Data Mover script on the Copy of Production:

```
PUUPJ01.DMS
```

Properties

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

Task 2-16-6: Running the PUBGN01 Drop Table Script

In this step, you will drop tables to prevent errors in the step Building the Create and Alter Scripts. Some of these tables may contain data that will be lost when the table is dropped; however, this data is not needed for the application. These PeopleSoft Planning and Budgeting tables contain data that is not used in the new release. Please note that these tables are recreated after the data conversion.

See "Applying Application Changes," Modifying the Database Structure, Building the Create and Alter Scripts.

Note. Some of these tables were delivered in updates or fixes. You may not have all of these tables in your database.

The script name is:

```
PUBGN01.DMS
```

Properties

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

Task 2-16-7: Running the PUPPKN01 Drop Table Script

In this step, you will drop tables to prevent errors in the step Building the Create and Alter Scripts. Run the following script to drop several Project Portfolio Management tables. The data in these tables is not used the new release. Please note that these tables are recreated after the data conversion.

See "Applying Application Changes," Modifying the Database Structure, Building the Create and Alter Scripts.

Note. You may not have these tables in your database if you are running Project Portfolio Management 8.80 with no Service Pack applied.

The script name is:

PUPPKN01.DMS

Properties

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

Task 2-16-8: Running the PUFTN01 Drop Table Script

In this step, you will drop table PS_FI_FCST_DEFN, which has been changed to a view in the new release. This table must be dropped to prevent errors in the step Building the Create and Alter Scripts. This table contains data that is not needed for the application.

See "Applying Application Changes," Modifying the Database Structure, Building the Create and Alter Scripts.

Note. This table may have been delivered in updates or fixes. You may not have this table in your database.

The script name is:

PUFTN01.DMS

Properties

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

Task 2-16-9: Running the PUPFX01 Drop Table Script

In this step, you will drop the DB_TRACE table. This table must be dropped to prevent errors in the task “Converting Database Data Types.” This table contains data that is not needed for the application.

See "Applying PeopleTools Changes," Converting Database Data Types.

The script name is:

PUPFX01.DMS

Properties

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

Task 2-16-10: Loading the Alter Analyzer Data

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. In this step, you run the PTALTDATLOAD Application Engine program for the Move to Production pass. This process preserves the database structure from your current release into temporary tables to be used later in the upgrade.

Properties

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

Task 2-16-11: Deleting Old Pagelet Wizard Data

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

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

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

Important! Only run the script if *both* of the following conditions are met.

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

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

```
PTPPB_EOPPB.DMS
```

To run the step automatically:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Preparing for the Application Upgrade, right-click on the step Deleting Old Pagelet Wizard Data, and select Step Properties.
3. In the Step Properties dialog box, change the Type from *ManualStop* to *DataMoverUser*, and click OK.
4. Select Edit, Run.

Properties

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

Task 2-17: Backing Up After Preparing Your Database

Back up your Copy of Production 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

CHAPTER 3

Applying PeopleTools Changes

This chapter discusses:

- Understanding PeopleTools Changes
- Verifying the Upgrade User
- Performing Script Modifications
- Performing Updates to PeopleTools System Tables
- Turning Off Change Control
- Loading Model Definition Data
- Loading Message Data
- Reviewing PeopleTools Objects
- Copying Projects
- Populating Tablespace Data
- Building the Updated PeopleTools Project
- Migrating Records to New Tablespaces
- Loading Base Data
- Loading Language Data
- Loading PeopleTools Data
- Loading PeopleTools Definition Group
- Converting PeopleTools Objects
- Creating PeopleTools Views
- Converting Integration Broker
- Converting Integration Broker Objects
- Updating Process Request Tables
- Clearing the Rowset Cache
- Setting Object Version Numbers
- Converting Database Data Types
- Converting Oracle Time Data Types
- Backing Up After the PeopleTools Upgrade
- Configuring the Scheduler and Server

Understanding PeopleTools Changes

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

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

Task 3-1: 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.

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

To grant your upgrade user PeopleSoft administrator privileges:

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

The following two conditions must be satisfied for the Upgrade User to access tools like Application Designer and Data Mover.

1. Verify that at least one of the Permission Lists the Upgrade User is tied to also exists in the New Release Demo database.
 - a. Run the following query on your Target database to determine the Permission Lists tied to the Upgrade user:

```
SELECT DISTINCT A.CLASSID FROM PSROLECLASS A, PSROLEUSER B, PSOPRDEFN C
WHERE A.ROLENAME = B.ROLENAME
AND B.ROLEUSER = C.OPRID
AND C.OPRID = '<Upgrade User>'
```

- b. Run the following query on the New Release database for the list of Permission Lists defined in it:

```
SELECT DISTINCT CLASSID FROM PSCLASSDEFN
```

- c. Verify that at least one of the values returned by the first query is present in the list returned by the second query.
2. This Permission List should have access enabled to tools like Application Designer and Data Mover in the New Release Demo database. To verify this:
 - a. Log in to the New Release Demo database's PIA.
 - b. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
 - c. Enter the above Permission Lists name in the search box and click Search.
 - d. Select the PeopleTools tab.
 - e. Check the Application Designer Access and Data Mover Access check boxes if not already checked.
 - f. Click Save.

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

Task 3-2: Performing Script Modifications

This section discusses:

- Understanding Script Modifications
- Updating the Configuration Manager Profile
- Running a DBTSFIX Report
- Editing the DBTSFIX Output Scripts
- Editing the GRANT Script
- Editing the PTxxxTLS Scripts
- Editing the DB2 Scripts
- Editing Move to Production Import Scripts
- Editing the Move to Production Password
- Editing the DDL Parameters
- Preparing for the Integration Broker Conversion
- Preparing for a PeopleTools Patch
- Editing Application Tablespace Step Properties
- Editing Multilingual Step Properties
- Editing Data Type Steps

Understanding Script Modifications

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

Note. Move to Production: These steps will be repeated in the Move to Production (MTP) pass. The script that you previously edited may be acceptable, or you may need to change it again if your New Copy of Production has a different security or data definition language (DDL) configuration.

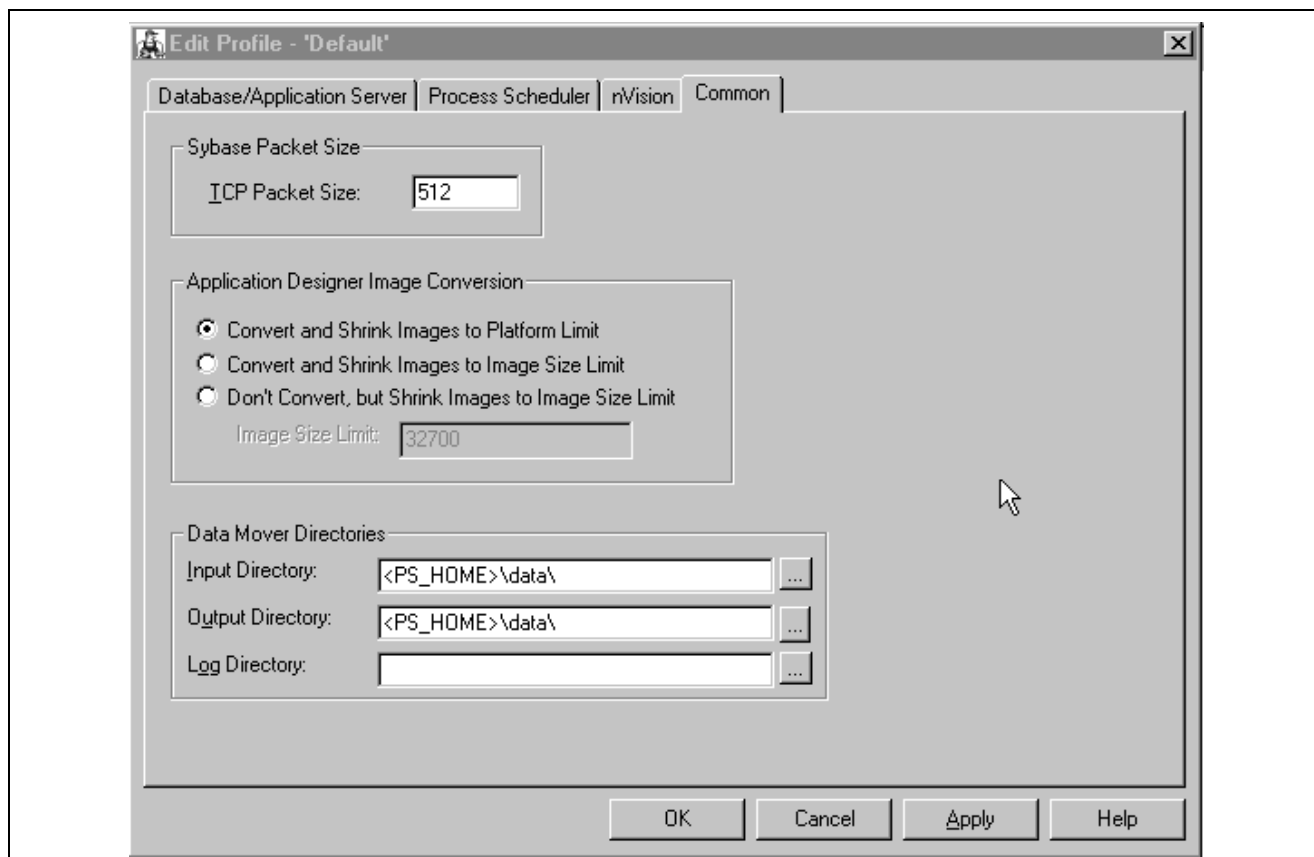
Task 3-2-1: Updating the Configuration Manager Profile

The PeopleSoft 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 that you may use during the upgrade.

To update the profile:

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

The following is an example of the Common tab.



Edit Profile - Default dialog box: Common tab

Note. As illustrated in the example above, the Input Directory must be *PS_HOME\data*, substituting *PS_HOME* with your directory. The Output Directory must be the same.

3. The Log Directory is set by PeopleSoft Change Assistant and should be left as is.
4. Select the Process Scheduler tab and verify your SQR settings. PeopleSoft Change Assistant will use these settings to launch SQR.

Properties

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

Task 3-2-2: Running a DBTSFIX Report

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

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

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

Properties

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

Task 3-2-3: Editing the DBTSFIX Output Scripts

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

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

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

Properties

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

Task 3-2-4: Editing the GRANT Script

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

Properties

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

Task 3-2-5: Editing the PTxxxTLS Scripts

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

To edit the PTxxxTLS scripts:

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

```
PTxxxTLS.DMS
PTxxxTLSytyy.DMS
```

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

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

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

Properties

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

Task 3-2-6: Editing the DB2 Scripts

Perform this step only if your database platform is DB2 z/OS. DB2 z/OS scripts that create tables need the `set current sqlid` statement so that the tables are created with the correct owner ID. Open each script listed below, then uncomment and modify all of the DB2-specific statements to reflect your environment.

For SQL scripts, if the script does not contain DB2-specific statements, add the following line to the top of the script and edit it for your environment:

```
set current sqlid = 'OWNERID (in uppercase)';
```

For PeopleSoft Data Mover scripts (DMSs), if the script does not contain DB2-specific statements, add the following line to the top of the script and edit it for your environment:

```
set execute_sql set current sqlid = 'OWNERID (in uppercase)';
```

Following is a list of the scripts that you need to edit:

```
DB2TMPIDXCREATE.SQL
MSGTLSUPG.DMS
PSLANGUAGES.DMS
pt_languagedata.dms
pt_licensecode.dms
PT_RELEASE_IMPORT.DMS
tlsupgnoncomp.dms
```

In several steps in the upgrade process, project definitions are copied into the database. Any DB2 z/OS scripts that are built from these project definitions will need to be modified before you run them. Set the following steps in your PeopleSoft Change Assistant job to a manual stop and edit the scripts for correct database/tablespace information. When you build the SQL scripts after copying the project, the database/tablespace names are the default values. You need to change these to the Target database specific values. To set a step to a manual stop in Change Assistant, highlight the step and select Edit, Stop from the menu bar.

In chapter 5, “Applying Application Changes,” set the step Re-Creating Upgrade Tables (in the task Modifying the Database Structure) as a manual stop and edit the UPGCONVERT_CRTTBL.SQL script.

Properties

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

Task 3-2-7: Editing Move to Production Import Scripts

Perform this step only if your database platform is DB2 z/OS.

During the Move to Production, there are several scripts that export data from the previous Copy of Production to the New Copy of Production. These scripts export the tables to a DAT file. When the tables are exported, all the table attributes, including the database-specific information (table owner, database name, and tablespace name), are stored in the DAT file. When you run the import script, it tries to create the tables and indexes using the database-specific information from the DAT file. So even though you ran the import script against your Copy of Production, you would still create tables in the upgraded database (which is the Source database for the Move to Production step). To create the tables in the Target database, open each script listed below, then uncomment and modify all of the DB2-specific statements to reflect your environment.

You will also need to add the following command into MVPRDIMP.DMS, near the end of the script, just after the REPLACE_DATA PSSTATUS command, but before the REPLACE_VIEW PSTEMPBLCNTVW command, to change *ownerid* to the owner ID of your database.

```
Update PSSTATUS set OWNERID='OWNERID (in uppercase)';
```

Following is a list of the scripts that you need to edit:

MVAPPIMP.DMS

MVPRDIMP.DMS

If you prefer, you can copy these overrides from the xxDMODBO.DMS script that was generated from DBSetup while installing your database. Make sure you remove the SET NO RECORD if you copy from the DBSetup generated file.

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

See “Applying Changes to the Production Database,” Performing the Move to Production.

Properties

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

Task 3-2-8: Editing the Move to Production Password

If your access ID and access password are different in the Copy of Production database than in the New Copy of Production database, you need to reset the access password in the MVPRDIMP.DMS script.

To modify passwords in your New Copy of Production database, append the following to your MVPRDIMP.DMS script and replace *ownerID*, *accessID*, and *accesspswd* with your values in the New Copy of Production database:

```
UPDATE PSSTATUS set OWNERID = 'ownerID';
UPDATE PSACCESSPRFL SET ACCESSID = 'accessID',
ACCESSPSWD = 'accesspswd', ENCRYPTED = 0;
ENCRYPT_PASSWORD *;
```

Properties

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

Task 3-2-9: Editing the DDL Parameters

Edit the *PS_HOME\SCRIPTS\DDLxxx.DMS* script for your database platform, as specified in the table below:

Script	Platform
DDLDB2 . DMS	DB2 z/OS
DDLDBX . DMS	DB2 UNIX/NT
DDLINF . DMS	Informix
DDLORA . DMS	Oracle

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

Properties

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

Task 3-2-10: Preparing for the Integration Broker Conversion

This section discusses:

- Understanding Integration Broker Conversion
- Editing PTIBUPGRADE.DMS
- Editing PTUPGIBDEL.SQL
- Editing the Change Assistant Template

Understanding Integration Broker Conversion

In this step, you edit various Integration Broker scripts that are run during the upgrade. You also need to modify PeopleSoft Change Assistant step properties with an updated script name so that the upgrade does not error out on an incorrect script name.

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier. You must perform this step if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier.

Editing PTIBUPGRADE.DMS

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

Editing PTUPGIBDEL.SQL

Edit *PS_HOME\SCRIPTS\PTUPGIBDEL.SQL* to delete data from the tables that only exist in the old PeopleSoft PeopleTools release. Open the script and modify it as follows.

To modify the PTUPGIBDEL.SQL script:

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

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

Editing the Change Assistant Template

Follow this procedure to edit your PeopleSoft Change Assistant template so that the correct script is run.

To edit the template:

1. In PeopleSoft Change Assistant, in the task Performing Updates to PeopleTools System Tables, right-click the step Cleaning Up Message Data, and then select Step Properties.
2. Change the Script/Procedure value from *PTUPGIBDEL8xx* to the specific name that you used in step 3 of the procedure Editing PTUPGIBDEL.SQL, without the .SQL extension.
3. Click OK.

Properties

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

Task 3-2-11: Preparing for a PeopleTools Patch

This section discusses:

- Understanding Preparing for a PeopleTools Patch
- Upgrading Without a PeopleTools Patch
- Upgrading With a PeopleTools Patch

Understanding Preparing for a PeopleTools Patch

You may be upgrading using a patched PeopleSoft PeopleTools release. In this step, you modify your PeopleSoft Change Assistant upgrade job depending on whether you are applying a PeopleSoft PeopleTools patch or not. Follow the instructions in the appropriate section below.

Upgrading Without a PeopleTools Patch

If you are *not* applying a PeopleSoft PeopleTools patch as part of the upgrade process, mark the following steps as complete in your upgrade job in PeopleSoft Change Assistant. These steps are not applicable when upgrading to an unpatched version of PeopleSoft PeopleTools:

- “Applying PeopleTools Changes,” Performing Updates to PeopleTools System Tables, Updating PeopleTools Patch Information
- “Applying PeopleTools Changes,” Copying Projects, Copying the PATCH85X Project
- “Applying PeopleTools Changes,” Copying Projects, Copying the PATCH85XML Project

To set the patch steps as complete:

1. In PeopleSoft Change Assistant, select the step.
2. Select Edit, Complete, or press F7.

Upgrading With a PeopleTools Patch

If you are applying a PeopleSoft PeopleTools patch as part of the upgrade process, review the patch documentation and perform any additional database upgrade instructions, other than running PTPATCH.DMS, that may be listed prior to the copy of the patch project. Do not run PTPATCH.DMS at this time, as PTPATCH.DMS will be run later in the upgrade.

Additionally, verify whether a database project was delivered with the patch. Perform the following steps only if you are applying a PeopleSoft PeopleTools patch that includes a database project.

To prepare for applying a PeopleSoft PeopleTools patch:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Copying Projects, right-click the step Copying the PATCH85X Project, and then select Step Properties.
3. In the Step Properties dialog box, change the #PROJECT value in the Parameters field from *PATCH85X* to the actual name of the PeopleTools patch project (e.g., *PATCH850*).

85X represents the PeopleSoft PeopleTools release of the patch project, which should correspond to the PeopleSoft PeopleTools release to which you are upgrading.

4. Click OK.
5. If you license multiple languages and translatable changes were delivered in the patch, perform the following steps:
 - a. In the task Copying Projects, right-click the step Copying the PATCH85XML Project, and then select Step Properties.
 - b. In the Step Properties dialog box, change the #PROJECT value in the Parameters field from *PATCH85XML* to the actual name of the PeopleTools patch project (e.g., *PATCH850ML*).

85X represents the PeopleSoft PeopleTools release of the patch project, which should correspond to the PeopleSoft PeopleTools release to which you are upgrading.

- c. Click the Upgrade button, and then click the Options button.

- d. On the Copy Options tab, deselect any languages that you do not license.
Common and English should remain deselected.
- e. Click OK three times.

Properties

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

Task 3-2-12: Editing Application Tablespace Step Properties

During each Move to Production pass, you must create any new tablespaces. You can reuse the same script created during the initial pass when you created new tablespaces, or you can build a new one if you plan to use different tablespaces on your production system.

See "Applying Application Changes," Updating Database Overrides, Creating New Tablespaces.

The script supplied by Oracle to create tablespaces for your upgrade is:

- PFDDL .SQL for Oracle or DB2 z/OS ANSI
- PFDDL .SQL for DB2 z/OS Unicode
- PFDDLMS .SQL for DB2 UNIX/NT ANSI
- PFDDLMSU .SQL for DB2 UNIX/NT Unicode

Once you have determined which script to run during Move to Production, modify your upgrade job with the correct script name.

To update the step Creating Application Tablespaces with the correct script name:

1. In PeopleSoft Change Assistant, open your upgrade job.
2. In the task Populating Tablespace Data, right-click the step Creating Application Tablespaces and then select Step Properties.
3. In the Script/Procedure field, change *xxDDL* to the name of the script that you want to run and click OK.
4. Select File, Save.

Properties

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

Task 3-2-13: Editing Multilingual Step Properties

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

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

To edit multilingual step properties:

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

See Copying the PPLTLS84CURML Project.

See Copying the PPLTLSML Project.

Properties

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

Task 3-2-14: Editing Data Type Steps

For PeopleSoft PeopleTools 8.48 and later, new data types are supported for Microsoft SQL Server 2005 or later and Oracle. These data type changes are only available for use in conjunction with PeopleSoft application release 9.0 or later. If you have already converted data types or are upgrading to a PeopleSoft application release earlier than 9.0, you must mark these steps as complete in the template now. Do *not* run these steps unnecessarily.

To set the Data Conversion steps as complete:

1. In PeopleSoft Change Assistant, select all the steps within the task Converting Database Data Types.
2. Press the F7 key.
3. Save the upgrade job in PeopleSoft Change Assistant.

See Converting Database Data Types.

Properties

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

Task 3-3: Performing Updates to PeopleTools System Tables

This section discusses:

- Understanding Updating PeopleTools System Tables
- Cleaning Up Message Data
- Updating System Catalog Views
- Updating PeopleTools System Tables
- Granting Privileges to the CONNECT ID
- Exporting Installation Data
- Updating the Product License Code
- Updating the Database for Timestamp
- Updating PeopleTools Patch Information
- Creating Temporary Performance Indexes
- Exporting PeopleTools System Tables
- Importing PeopleTools System Tables
- Resetting the Database Options Flag
- Rerunning Update Statistics for DB2 zOS
- Rerunning the RUNSTATS Report for DB2 UNIX NT
- Rerunning Update Statistics for DB2 UNIX NT
- Rerunning Update Statistics for Informix
- Rerunning Update Statistics for Oracle
- Saving Transparent Data Encryption Information

Understanding Updating PeopleTools System Tables

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

Important! From this point forward, run all steps using the new release of PeopleSoft PeopleTools on your Copy of Production database, unless otherwise indicated.

Task 3-3-1: Cleaning Up Message Data

This step runs PTUPGIBDEL8xx.SQL, where *xx* represents the last two digits of the PeopleSoft PeopleTools release from which you are upgrading. Message functionality and structure changed as of PeopleSoft PeopleTools 8.48, and the old data is obsolete.

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier. You must perform this step to clean out obsolete message data if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier.

Properties

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

Task 3-3-2: Updating System Catalog Views

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

Properties

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

Task 3-3-3: Updating PeopleTools System Tables

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

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

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

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

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your new release.

Properties

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

Task 3-3-4: Granting Privileges to the CONNECT ID

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

Properties

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

Task 3-3-5: Exporting Installation Data

This step runs pt_installdata.dms, which exports data that was loaded into the New Release Demo during installation.

Properties

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

Task 3-3-6: Updating the Product License Code

The new PeopleSoft release stores your application product license code on the database. This code is used to unlock the pages and Application Engine programs that you licensed. It also provides necessary product information about your database to be used for identifying software maintenance that may need to be applied.

You need to populate the databases that were upgraded to the new PeopleSoft release so that you have the correct access to pages and Application Engine programs that you licensed.

When your new PeopleSoft databases were installed, the appropriate application license code was added to your database in the PSOPTIONS table. This was done in an update statement that was created when DBSETUP was run to create the PeopleSoft Data Mover script for the new PeopleSoft release. The location of this script is:

```
PS_HOME\SCRIPTS\DBnameDBplatform.DMS
```

DBname is the name of the Demo database that you installed and *DBplatform* represents the code used for the database platform, as shown in the following table:

Database Platform	Code Used
Microsoft SQL Server	MSS
DB2 UDB z/OS	DB2
DB2 UDB UNIX/NT	DBX

Database Platform	Code Used
Oracle	ORA
Informix	INF
Sybase	SYB

This step runs `pt_licensecode.dms`, which updates your upgrade database with the same license code and license group that was used to install the New Release Demo database. You will be able to access the pages and Application Engine programs that you licensed after running the script.

Properties

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

Task 3-3-7: Updating the Database for Timestamp

This step runs `PS_HOME/scripts/UPGDBOPTIONS_ENABLETIMESTAMP.SQL`. This script updates the database to indicate that the new `TIMESTAMP` data types are now enabled. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

Properties

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

Task 3-3-8: Updating PeopleTools Patch Information

This step runs `PTPATCH.DMS`, which updates your database with the version of the PeopleSoft PeopleTools patch being applied.

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

Properties

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

Task 3-3-9: Creating Temporary Performance Indexes

Perform this step only if you are running on a DB2 z/OS platform. This step runs the `DB2TMPIDXCREATE` script to create multiple indexes for rename performance. You will drop these indexes later in the upgrade process.

Properties

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

Task 3-3-10: Exporting PeopleTools System Tables

The script for this step exports the content of the PeopleSoft PeopleTools tables from the Copy of Production database during your Move to Production passes. During the initial pass, you run programs to convert some objects, like PeopleCode and fields. You perform analysis to decide which objects, such as records and menus, to bring over to your production database and which customized objects to keep. At the end of the initial pass, you reapply customizations or make other changes, such as modifying your permission lists. You do not need to repeat those tasks in the Move to Production pass because this script exports all of your changes to the PeopleSoft PeopleTools objects.

The script name for your upgrade path is:

MVPRDEXP.DMS

Properties

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

Task 3-3-11: Importing PeopleTools System Tables

The script for this step imports the content of the PeopleSoft PeopleTools tables into your New Copy of Production database during your Move to Production passes.

These MVPRD* scripts replace tasks and steps performed in the initial pass. These tasks and steps may include:

- Copying Projects
- Renaming Records and Fields
- Running Upgrade Compare Reports
- Running Project Compare Reports
- Running the Upgrade Copy

If your RDBMS uses tablespaces, edit this script for the proper DDL information.

The script name for your upgrade path is:

MVPRDIMP.DMS

Properties

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

Task 3-3-12: Resetting the Database Options Flag

This step runs UPGDBOPTIONS_DISABLE.SQL, which resets the PSSTATUS.UPGDBOPTIONS flag. The flag is reset only for upgrades where you are coming from a PeopleSoft application release prior to 9.0 and going to a PeopleSoft application release of 9.0 or later with PeopleSoft PeopleTools 8.48 or later. The PeopleSoft PeopleTools upgrade must be applied using the old data types as the data type conversion will occur after the PeopleSoft PeopleTools changes have been completed.

Properties

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

Task 3-3-13: Rerunning Update Statistics for DB2 zOS

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

Properties

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

Task 3-3-14: Rerunning the RUNSTATS Report for DB2 UNIX NT

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

Properties

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

Task 3-3-15: Rerunning Update Statistics for DB2 UNIX NT

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

Properties

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

Task 3-3-16: Rerunning Update Statistics for Informix

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

Properties

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

Task 3-3-17: Rerunning Update Statistics for Oracle

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

Properties

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

Task 3-3-18: Saving Transparent Data Encryption Information

PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. If you have defined encrypted fields within PeopleSoft PeopleTools for Oracle's Transparent Data Encryption (TDE) feature, note that all metadata field definitions are delivered from PeopleSoft applications without any encryption attributes enabled. PeopleSoft applications will not deliver any metadata indicating that encryption is enabled for any field for an initial installation database file, project, or a PeopleSoft PeopleTools or PeopleSoft application patch. If you customize any fields by adding TDE encryption, you will need to keep track of the fields and their associated record definitions and ensure that you maintain the desired encryption status throughout any upgrades that you perform.

If you have TDE enabled, run *PS_HOME\scripts\preupgtdeprocess.sql*. This script clears the TDE encryption algorithm currently defined in the PeopleSoft metadata. The script also creates two projects, ENCRYPTEDFLDSB and ENCRYPTEDTBLSB. The project ENCRYPTEDFLDSB contains fields that currently have distinct encrypted columns and the project ENCRYPTEDTBLSB contains recfields that currently have distinct encrypted columns, as indicated in the Oracle database catalog.

You will need the information in the projects and the log file that results from running this script in order to reimplement TDE after the upgrade.

See “Completing Database Changes,” Enabling Oracle Transparent Data Encryption.

Properties

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

Task 3-4: Turning Off Change Control

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

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are executed only during the initial pass and the feature is disabled only for the initial pass.

See “Completing Database Changes,” Reviewing Change Control.

Properties

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

Task 3-5: Loading Model Definition Data

This section discusses:

- Understanding Loading Model Definition Data
- Loading Model Definitions for DB2 zOS
- Loading Model Definitions for DB2 UNIX NT
- Loading Model Definitions for Oracle
- Loading Model Definitions for Informix

- Loading Model Definitions for Microsoft
- Loading Model Definitions for Sybase

Understanding Loading Model Definition Data

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

See Performing Script Modifications.

Task 3-5-1: Loading Model Definitions for DB2 zOS

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

Properties

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

Task 3-5-2: Loading Model Definitions for DB2 UNIX NT

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

Properties

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

Task 3-5-3: Loading Model Definitions for Oracle

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

Properties

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

Task 3-5-4: Loading Model Definitions for Informix

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

Properties

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

Task 3-5-5: Loading Model Definitions for Microsoft

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

Properties

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

Task 3-5-6: Loading Model Definitions for Sybase

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

Properties

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

Task 3-6: Loading Message Data

This step runs the msgtlsupg.dms script, which loads system messages in the message catalog.

Properties

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

Task 3-7: Reviewing PeopleTools Objects

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

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

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

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

To review PeopleSoft PeopleTools objects:

1. Open the PPLTLS84CUR project on your Target database.
 - a. Launch PeopleSoft Application Designer and sign in to the Target database.
 - b. Select Tools, Compare and Report..., From File...
 - c. Navigate to *PS_HOME*\projects and select the PPLTLS84CUR project.

Note. It is OK to have the project definition overwritten by the project that is being copied from file.

2. Verify that all object types are selected.
3. Select Options.
4. Select a value for Target Orientation.
5. For Comparison, use one of these options:
 - For Comparison by Release, select the highest release in the list.
 - For Compare by Date, select a date.
6. Under Compare Languages, select Common and English.
7. If you have non-English languages loaded, select the other languages that are loaded into your database.
8. Select the Report Filter tab and click Default.
This will cause only customizations to appear on the compare reports.
9. Click OK.
10. Click Compare to start the compare process.
11. Evaluate the compare reports to identify whether the delivered objects conflict with any of your customizations.

Note. To preserve the PPLTLS84CUR compare reports, you must perform one of the following actions: rename the reports, move the reports to a different folder, or reset the Compare Report Output Directory.

To reset the Compare Report Output Directory, in PeopleSoft Application Designer, select Tools, Options. On the General tab, change the path specified for the Report Output Directory.

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

Properties

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

Task 3-8: Copying Projects

This section discusses:

- Understanding Copying Projects
- Copying the PPLTLS84CUR Project
- Copying the PPLTLS84CURML Project
- Copying the PPLTLSML Project
- Copying the PPLTLS84CURDEL Project
- Copying the PATCH85X Project
- Copying the PATCH85XML Project

Understanding Copying Projects

In this task, you copy projects. The copy process overwrites all customizations, which can include configuration settings stored on the PeopleSoft PeopleTools objects.

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

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

See the Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer Developer’s Guide for your new release.

Task 3-8-1: Copying the PPLTLS84CUR Project

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

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

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

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

Properties

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

Task 3-8-2: Copying the PPLTLS84CURML Project

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

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

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

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

Properties

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

Task 3-8-3: Copying the PPLTLSML Project

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

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

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

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

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All	All	Arabic Bulgarian Croatian Czech Danish Finnish French Greek Hebrew Hungarian Malay Norwegian Polish Romanian Russian Serbian Slovak Slovenian Turkish UK English

Task 3-8-4: Copying the PPLTLS84CURDEL Project

This process deletes specified PeopleSoft PeopleTools objects from your database.

The copy process detects whether any deleted fields are in use on other objects, such as records. You may see the following kind of warning during the copy:

Field *FIELDNAME* is in use on at least one record.

You must clean up any objects that reference deleted fields after the upgrade. When the PeopleSoft PeopleTools upgrade process deletes a field, it no longer exists in the new release, but you may still have objects that reference the deleted field. After fixing any objects that reference the field, delete the field from your system.

Properties

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

Task 3-8-5: Copying the PATCH85X Project

This process copies specified objects to the database that are necessary for the proper operation of PeopleSoft PeopleTools. The PATCH85X project contains all PeopleSoft PeopleTools objects that have been updated in the patch. Earlier in the upgrade, you modified the step properties of this step with the appropriate patch project name.

See “Applying PeopleTools Changes,” Performing Script Modifications, Preparing for a PeopleTools Patch.

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

Properties

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

Task 3-8-6: Copying the PATCH85XML Project

This process copies language-specific PeopleSoft PeopleTools objects to your database that are necessary for the proper operation of PeopleSoft PeopleTools. The PATCH85XML project contains all translatable PeopleSoft PeopleTools objects that have been updated in the patch. Earlier in the upgrade, you modified the step properties of this step with the appropriate patch project name and the appropriate languages.

See “Applying PeopleTools Changes,” Performing Script Modifications, Preparing for a PeopleTools Patch.

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

Properties

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

Task 3-9: Populating Tablespace Data

This section discusses:

- Creating Application Tablespaces
- Creating Application Tablespaces for Informix
- Populating Updated Tablespace Data
- Updating Tablespace Names

Task 3-9-1: Creating Application Tablespaces

This step creates any new tablespaces needed for the upgrade. Earlier in the upgrade, you modified the step properties of this step with the appropriate script name.

See "Applying PeopleTools Changes," Performing Script Modifications, Editing Application Tablespace Step Properties.

Properties

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

Task 3-9-2: Creating Application Tablespaces for Informix

During each Move to Production pass, you must create any new tablespaces. You can reuse the same script created during the initial pass when you created new tablespaces, or you can build a new one if you plan to use different tablespaces on your production system.

See "Applying Application Changes," Updating Database Overrides, Creating New Tablespaces.

The script supplied by Oracle to create tablespaces for your upgrade is:

PFDDL.SH

FTP the script to the server. Sign in as the database owner (Informix user) and run the script to create the new tablespaces.

Properties

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

Task 3-9-3: Populating Updated Tablespace Data

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

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

If you receive any errors when you run this script, correct them by creating the needed tablespace or changing the tablespace definition on the record object. Then run the script again to validate that you have created all tablespaces.

Properties

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

Task 3-9-4: Updating Tablespace Names

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

- Generate the alter/create scripts and globally edit the scripts, changing the database/tablespace values to those of your Copy of Production database.
- Directly update the PSRECTBLSPC table with your Target database names before generating the alter/create scripts.

This will ensure that the database name/tablespace names in the generated alter/create scripts will be correct. The syntax to update the PSRECTBLSPC table is as follows:

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

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

Properties

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

Task 3-10: Building the Updated PeopleTools Project

This section discusses:

- Generating the Updated PeopleTools Script
- Editing the Updated PeopleTools Script
- Running the Updated PeopleTools Script

Task 3-10-1: Generating the Updated PeopleTools Script

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

PPLTLS84CURTABLES.SQL

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

Properties

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

Task 3-10-2: Editing the Updated PeopleTools Script

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

Properties

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

Task 3-10-3: Running the Updated PeopleTools Script

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

Properties

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

Task 3-11: Migrating Records to New Tablespaces

This section discusses:

- Understanding Record Migration to New Tablespaces
- Copying the PT84TBLSPC Project
- Building the Tablespace Alter Script
- Editing the Tablespace Alter Script
- Running the Tablespace Alter Script

Understanding Record Migration to New Tablespaces

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

Task 3-11-1: Copying the PT84TBLSPC Project

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

Properties

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

Task 3-11-2: Building the Tablespace Alter Script

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

TABLESPACEALTERTABLES.SQL

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

Properties

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

Task 3-11-3: Editing the Tablespace Alter Script

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

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

Properties

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

Task 3-11-4: Running the Tablespace Alter Script

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

Properties

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

Task 3-12: Loading Base Data

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

Properties

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

Task 3-13: Loading Language Data

This section discusses:

- Populating the Language Table
- Loading the Language Data

Task 3-13-1: Populating the Language Table

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

Properties

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

Task 3-13-2: Loading the Language Data

This step runs `pt_languagedata.dms`, which updates your upgrade database with the list of installed languages from the New Release Demo database. The PeopleSoft Data Mover import script used to create the New Release Demo database contained an update statement similar to the following:

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

Properties

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

Task 3-14: Loading PeopleTools Data

This section discusses:

- Loading Noncomparable Objects
- Loading English Messages
- Loading English String Data
- Loading Stored Statements Data

Task 3-14-1: Loading Noncomparable Objects

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

Properties

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

Task 3-14-2: Loading English Messages

This step runs the `MSGTLENG.DMS` script, which loads English messages into your database.

Properties

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

Task 3-14-3: Loading English String Data

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

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

Properties

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

Task 3-14-4: Loading Stored Statements Data

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

This step runs the STOREPT.DMS script, which loads the dynamic SQL used by the PeopleSoft PeopleTools-delivered COBOL.

Properties

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

Task 3-15: Loading PeopleTools Definition Group

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

Properties

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

Task 3-16: Converting PeopleTools Objects

This section discusses:

- Updating the REN Server Configuration
- Populating MCF Data
- Converting Portal Objects
- Converting Query Prompt Headings
- Encrypting Connector Passwords
- Loading Conversion Data
- Reporting Conversion Details
- Running PeopleTools Data Conversion

Task 3-16-1: Updating the REN Server Configuration

This step runs the Application Engine program UPGMCF843, which converts real-time event notification (REN) server configuration information to the new format. REN servers run in the application server domain. They are used for the PeopleSoft PeopleTools MultiChannel Framework (MCF) and Reporting Window output option. The program converts standard REN server configurations to the new format, including MCF cluster information. All REN server configuration information is now stored within the database. You must upgrade old REN server configurations before attempting to boot with the new version of PeopleSoft PeopleTools. If you did not have any REN servers configured prior to starting the upgrade, then the UPGMCF843 program does not make any changes. If one of your configurations cannot be converted, error messages will be written in the Application Engine message log. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.42 or earlier.

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

Properties

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

Task 3-16-2: Populating MCF Data

This step runs the Application Engine program MCF_UPGR_SND, which populates the PS_MCFEM_MAIL_DSCR table with data. In PeopleSoft PeopleTools 8.44, the REPLY_TO header functionality was added. The field PS_MCFEM_MAIL_DSCR.MCF_REPLY_TO is populated with the values stored in PS_MCFEM_MAIL_MAIN.MCF_EMAIL_SENDER. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

Properties

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

Task 3-16-3: Converting Portal Objects

This step runs the Application Engine program UPG844PORTAL, which splits PSPRSMDEFN.PORTAL_URLTEXT into segments and stores them in separate columns: PORTAL_URI_SEG1, PORTAL_URI_SEG2, PORTAL_URI_SEG3, and PORTAL_URI_SEG4. This is performed for PeopleSoft Component URLs to extract values for Menu, Component, and Market. Values for Record, Field, Event, and Function Names are extracted from PeopleSoft URLs. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

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

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

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

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

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

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

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

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

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

See the Enterprise PeopleTools PeopleBook: PeopleTools Portal Technology for your new release.

Properties

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

Task 3-16-4: Converting Query Prompt Headings

This step runs the Application Engine program UPGQRYDUPHED, which searches for duplicate prompt headings in the table PSQRYBIND and appends numbers onto the text. For example, *Item ID* would become *Item ID 2*. When you run Crystal through the process scheduler, it cannot handle queries with two or more prompts that have the same heading. These duplicates are also not legal in Query. You need to alter any old queries that have duplicate prompt headings so that they work with Crystal. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

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

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

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

Properties

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

Task 3-16-5: Encrypting Connector Passwords

This step runs the Application Engine program UPGRDPASSWDS, which encrypts the password property field for the POP3Target, FTPTarget, GetMailTarget, and JMSTarget connectors. PeopleSoft Change Assistant will display and run this step only if you are upgrading from PeopleSoft PeopleTools 8.43 or earlier.

Properties

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

Task 3-16-6: Loading Conversion Data

This step runs the ptupgconv.dms script, which imports PeopleSoft PeopleTools data conversion Application Engine driver data into your database.

Properties

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

Task 3-16-7: Reporting Conversion Details

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

Properties

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

Task 3-16-8: Running PeopleTools Data Conversion

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

Properties

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

Task 3-17: Creating PeopleTools Views

This section discusses:

- Creating Updated PeopleTools Views

Task 3-17-1: Creating Updated PeopleTools Views

This step creates all views defined in the PPLTLS84CUR project. These are PeopleTools views that have changed and are required for tasks later in the upgrade.

Properties

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

Task 3-18: Converting Integration Broker

This section discusses:

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

Understanding Converting Integration Broker

PeopleSoft Change Assistant will display and run the steps in this task only if you are upgrading from PeopleSoft PeopleTools 8.47 or earlier.

Task 3-18-1: Updating Integration Broker Defaults

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

Properties

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

Task 3-18-2: Creating Integration Broker Objects

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

Properties

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

Task 3-18-3: Saving Application Messaging Objects

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

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

Properties

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

Task 3-18-4: Exporting Node Transactions

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

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

Properties

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

Task 3-18-5: Preparing Integration Broker Deletes

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

Properties

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

Task 3-18-6: Deleting Application Messaging Objects

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

Properties

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

Task 3-18-7: Deleting Node Transactions

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

Properties

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

Task 3-19: Converting Integration Broker Objects

In this task, the PeopleTools Upgrade Driver Application Engine program PTUPGCONVERT runs additional PeopleSoft PeopleTools upgrade data conversions. The program then reads the table PS_PTUPGCONVERT, selecting all rows with a group number of 04 and ordering them by the row sequence number. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the sequence number order. Review the report generated by PTUCONV.SQR for details on the conversions that are run in this step.

Properties

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

Task 3-20: Updating Process Request Tables

This task runs the MGRPRCSTBL Application Engine program, which updates existing processes with the correct values for your environment.

Properties

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

Task 3-21: Clearing the Rowset Cache

This step runs `clear_rowset_cache.dms`, which removes RowsetCache objects from the database. The structure of RowsetCache objects may not be compatible across PeopleSoft PeopleTools releases. New RowsetCache objects will automatically be generated after the old RowsetCache objects have been cleared out. This will ensure proper operation of your application with the new PeopleSoft PeopleTools release.

Properties

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

Task 3-22: Setting 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. You will rerun the VERSION application engine program later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to rename the files manually after completing this task.

Properties

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

Task 3-23: Converting Database Data Types

This section discusses:

- Understanding Converting Database Data Types
- Backing Up Before Platform Changes

- Running the Long Data Audit
- Validating the Microsoft Database
- Reviewing Microsoft Settings
- Creating the Microsoft Conversion Project
- Generating the Microsoft Conversion Script
- Running the Microsoft Conversion Script
- Granting Permissions to the CONNECT ID
- Running the Microsoft Conversion Report
- Validating the Oracle Database
- Creating Oracle Audit Tables
- Auditing Duplicate Length Constraints
- Auditing Disabled Constraints
- Reviewing Oracle Settings
- Generating Oracle Conversion Scripts
- Running Long to LOB Script 1
- Running Long to LOB Script 2
- Running Long to LOB Script 3
- Running Long to LOB Script 4
- Running Long to LOB Script 5
- Running Long to LOB Script 6
- Running Long to LOB Script 7
- Running Long to LOB Script 8
- Auditing the Long to LOB Conversion
- Running CLS Drop Indexes Script 1
- Running CLS Drop Indexes Script 2
- Running CLS Drop Indexes Script 3
- Running CLS Drop Indexes Script 4
- Running CLS Drop Indexes Script 5
- Running CLS Drop Indexes Script 6
- Running CLS Drop Indexes Script 7
- Running CLS Drop Indexes Script 8
- Running Character Length Script 1
- Running Character Length Script 2
- Running Character Length Script 3

- Running Character Length Script 4
- Running Character Length Script 5
- Running Character Length Script 6
- Running Character Length Script 7
- Running Character Length Script 8
- Running CLS Rebuild Indexes Script 1
- Running CLS Rebuild Indexes Script 2
- Running CLS Rebuild Indexes Script 3
- Running CLS Rebuild Indexes Script 4
- Running CLS Rebuild Indexes Script 5
- Running CLS Rebuild Indexes Script 6
- Running CLS Rebuild Indexes Script 7
- Running CLS Rebuild Indexes Script 8
- Auditing Character Length Semantics
- Reviewing Conversion Reports
- Updating Database Options

Understanding Converting Database Data Types

As of PeopleSoft PeopleTools 8.48, new database data types are supported for Microsoft SQL Server 2005 or later and Oracle 9i or later. These data type changes are mandatory for PeopleSoft application releases 9.0 or later. However, if you are either already using the new data types in conjunction with a PeopleSoft application release that is 9.0 or later, or are upgrading to a PeopleSoft application release that is earlier than 9.0, you should *not* run this task and should have already marked the steps in this task as complete in the PeopleSoft Change Assistant template. Do *not* run this task unnecessarily.

For Microsoft SQL Server 2005 and later, the data types VARCHAR, NVARCHAR, VARBINARY(MAX), and VARCHAR(MAX) are now supported. Databases on Microsoft SQL Server 2000 and earlier will not use these new data types. The data types as defined in PeopleSoft Application Designer are not changed; only the database-level definition will be different:

- Records with fields defined as PeopleSoft CHAR(N) will now use VARCHAR(N).
- Records with fields defined as PeopleSoft NCHAR(N) will now use NVARCHAR(N).
- Records with fields defined as PeopleSoft Long Character(N) will now use VARCHAR(N) if N is <=4000 and VARCHAR(MAX) if N is > 4000 for non-Unicode.
- Records with fields defined as PeopleSoft Long Character(N) will now use NVARCHAR(N) if N is <=4000 and VARCHAR(MAX) if N is > 4000 for Unicode databases.
- Records with fields defined as PeopleSoft IMAGE will now use VARBINARY(MAX).

For Oracle 9i or later, the data types CLOB and BLOB are now supported. In addition, the Character Length Semantics feature is also supported for Unicode databases when creating PeopleSoft CHAR fields and LONG CHARACTER fields with specified lengths less than 1334:

- Records with fields defined as PeopleSoft IMAGE or PeopleSoft LONG CHARACTER with Raw Binary will now use BLOB.
- Records with fields defined as PeopleSoft LONG CHARACTER with no length specified, length greater than 1333 (UNICODE), or length greater than 1333 (ANSI) will now use CLOB.

Task 3-23-1: Backing Up Before Platform Changes

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

Important! For Oracle platforms, contact your database administrator to update the statistics on the database catalog. This will improve performance for subsequent steps in the upgrade. Typically only the users sys and sysdba have the authority to perform this task.

The following command updates the statistics on the database catalog:

```
EXEC DBMS_STATS.GATHER_SCHEMA_STATS( 'SYS' );
```

Properties

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

Task 3-23-2: Running the Long Data Audit

This step runs LONGS-AUDIT.SQL, which audits for any fields exceeding the actual data length for PeopleSoft long character columns. You will review the output in a later step.

Properties

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

Task 3-23-3: Validating the Microsoft Database

This step runs DBSETTINGS.SQL, which checks the Microsoft SQL Server version. The data type conversion is supported only with Microsoft SQL Server 2005 or later. You will review the output in a later step.

Properties

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

Task 3-23-4: Reviewing Microsoft Settings

If you are upgrading to a PeopleSoft 9.0 or later application release, the data type update *and* a minimum of Microsoft SQL Server 2005 are required. You will run a conversion process that will substitute the old data types for new ones. The data type conversion is supported for Microsoft SQL Server 2005 or later with PeopleSoft PeopleTools 8.48 or later and an application release 9.0 or later. Examine the log file from the step Validating the Microsoft Database to ensure that you are running a supported version of Microsoft SQL Server. Do *not* perform the rest of this task if you do not meet the qualifications.

Examine the log file from the step Running the Long Data Audit to determine if there are any fields shorter than length 4000 in the database that exceed the actual data length defined for the PeopleSoft long character fields. Prior to PeopleSoft PeopleTools 8.48, all PeopleSoft long character fields were created using the TEXT SQL Server data type, and no matter the length defined by the PeopleSoft Application Designer, the data in the field could grow as much as the TEXT limits on SQL Server. After the data type conversion, the length specified in PeopleSoft Application Designer will be enforced for all fields shorter than length 4000, except for those with length zero. If your data is larger than the length defined in PeopleSoft Application Designer, then you must correct the length using PeopleSoft Application Designer or change the data itself using your SQL query tool. You must decide whether you want a change in the field length definition or a change in the data. The log file created by LONGS-AUDIT.SQL will only show all of the fields that contain data exceeding a length between 1 and 4000 and will be empty if this condition does not occur with no other action to take.

Resolve these problems before continuing to the next step, otherwise the conversion process will fail. If necessary, contact your DBA for assistance in modifying the fields. If no fields are listed in the log file, no further action is needed and you may proceed with the upgrade.

Note. During Move to Production passes, copy MSSNEWTYPE_ALTER.SQL from your initial pass upgrade's output directory and place it into the output directory for your Move to Production pass. This script is only generated during the initial pass. Edit the script and correct the database name on the first line of the script to point to the Target database for the pass.

Properties

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

Task 3-23-5: Creating the Microsoft Conversion Project

This step runs MSSNEWTYPE.SQL, which generates and populates the MSSNEWTYPE project. The project contains all of the records that need to be modified to use the newly supported data types.

Properties

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

Task 3-23-6: Generating the Microsoft Conversion Script

This step generates the SQL script MSSNEWTYPE_ALTER.SQL to alter the records in the MSSNEWTYPE project. The generated script will alter the tables with the new data types.

Properties

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

Task 3-23-7: Running the Microsoft Conversion Script

This step runs the generated script from the previous step. This will alter the existing tables to use the new data types. All of the tables will be copied into their new representation using the new data types and all of the additional padding blanks derived from the use of the old data types will be truncated.

Properties

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

Task 3-23-8: Granting Permissions to the CONNECT ID

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

Properties

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

Task 3-23-9: Running the Microsoft Conversion Report

This step runs CONVERSION-AUDIT.SQL, which audits for all unconverted fields. You will review the output in a later step.

Properties

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

Task 3-23-10: Validating the Oracle Database

This step runs the DBSETTINGS.SQL script, which queries the database to determine the value of the NLS_LENGTH_SEMANTICS parameter. You will review the output in a later step.

There are two possible conversions that may occur depending on whether or not the database is Unicode. The Long to LOB conversion will apply to all databases, Unicode or ANSI. CHARACTER LENGTH SEMANTICS (CLS) only applies to Unicode databases. The CLS conversion has a dependency on the init.ora parameter NLS_LENGTH_SEMANTICS. The init.ora parameter NLS_LENGTH_SEMANTICS=CHAR, must be enabled for PeopleSoft Enterprise Unicode databases prior to executing the conversion. If the database being converted is ANSI, then this setting is not necessary.

Properties

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

Task 3-23-11: Creating Oracle Audit Tables

This step runs PRECNVADT1A.SQL, which drops and re-creates some temporary tables required by the pre-conversion audit SQRs.

If the tables being dropped, CHECK_CONSTRAINTS, DUPLICATE_CONSTRAINTS, and DROP_CONSTRAINTS, don't exist, the execution of this script will generate the following error, which can safely be ignored:

```
ORA-00942: table or view does not exist
```

Properties

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

Task 3-23-12: Auditing Duplicate Length Constraints

This step runs PRECNVADT1.SQR, which checks for duplicate length constraints. This condition can generally exist if the database was created using the Oracle Import utility and CONSTRAINTS=Y was enabled, which is the default setting. You will review the output in a later step.

Note. If this SQR needs to be rerun for any reason, you *must* run PRECNVADT1A.SQL before rerunning PRECNVADT1.SQR.

Properties

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

Task 3-23-13: Auditing Disabled Constraints

This step runs PRECNVADT2.SQR, which checks for 'not_validated' constraints. Although this condition should not exist in a production database, it may have occurred if data was imported with external utilities, such as SQL Loader. You will review the output in a later step.

Properties

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

Task 3-23-14: Reviewing Oracle Settings

The data type conversion is only supported for Oracle 9i or later when you are upgrading to PeopleSoft PeopleTools 8.48 or later and to a PeopleSoft application release that is 9.0 or later. Do *not* perform the rest of this task if you do not meet the qualifications.

For Unicode databases, examine the log file from the step Auditing Duplicate Length Constraints. If there are any duplicate length constraints, those duplicate constraints must be dropped. Run the utility SQL script, *PS_HOME*\scripts\GENDROPDUPCONSTRAINTS.SQL, to generate the script DROPDUPCONSTRAINTS.SQL, containing an ALTER TABLE *TABLE_NAME* DROP CONSTRAINT for every duplicate constraint found. Run the DROPDUPCONSTRAINTS.SQL to resolve the duplicate length constraints.

For Unicode databases, examine the log file from the step Auditing Disabled Constraints. If there are any disabled or non-validated constraints, these constraints should be re-validated. Run the utility SQL script, *PS_HOME*\scripts\GENREVALIDATECONSTRAINTS.SQL to generate the script REVALIDATECONSTRAINTS.SQL, containing an ALTER TABLE *TABLE_NAME* ENABLE VALIDATE CONSTRAINT *CONSTRAINT_NAME* for every invalid constraint found. Run the REVALIDATECONSTRAINTS.SQL to enable the constraints.

For Unicode databases, examine the log file from the step “Validating the Oracle Database” to determine if the values in the init.ora file are set properly. For Unicode databases, the NLS_LENGTH_SEMANTICS parameter needs to have a value of *CHAR*. This indicates that CHARACTER LENGTH SEMANTICS is enabled and the conversion can continue. If you need to enable Character Length Semantics, work with your database administrator to modify the init.ora for the Target database’s SID and set NLS_LENGTH_SEMANTICS to *CHAR*. Then stop and restart the database SID for the setting to take effect.

Note. The NLS_LENGTH_SEMANTICS parameter should be set to *CHAR* *only* at this point in the upgrade, and should not be set to *CHAR* earlier in the upgrade. If it is set at the time of database creation, the data type conversion scripts will fail with an ORA-30556 error due to the existence of functional indexes on the table.

Properties

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

Task 3-23-15: Generating Oracle Conversion Scripts

Work with your database administrator to set the following init.ora parameters for the Target database’s system identifier (SID). Stop and restart the database SID for the following settings to take effect:

1. Set the following init.ora parameters:

```
db_block_size=8192
db_cache_size=325165824
```

```

db_file_multiblock_read_count=8
job_queue_processes=10
shared_pool_size=425829120
pga_aggregate_target=5871947670
parallel_max_servers=8
workarea_size_policy=AUTO

```

Note. If you are using Oracle 10g or higher, you may use the parameters `SGA_TARGET=300M` and `SGA_MAX_SIZE=350M` instead of `SHARED_POOL_SIZE`, `DB_CACHE_SIZE`, and `DB_BLOCK_BUFFERS`.

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure that you have at least six redo logs sized at 500 MB each.

The Oracle data types script generation program is a Java program which connects to an Oracle database. The prerequisites are Java and the Oracle JDBC Drivers.

The Java JDK required for this conversion program to run (Version 1.5) will automatically be picked up by the .bat file if the `PS_HOME` environment variable is set.

To verify whether the `PS_HOME` environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %PS_HOME%;
```

This should return a path, for example:

```
c:\PSOFT\PT850
```

2. If the `PS_HOME` environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET PS_HOME=PS_Home_location
```

The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the `%ORACLE_HOME%` environment variable is set.

To verify whether the `ORACLE_HOME` environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %ORACLE_HOME%;
```

This should return a path, for example:

```
c:\oracle\product\10.1.0\client_1;
```

2. If the `ORACLE_HOME` environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET ORACLE_HOME=Oracle_Home_location
```

The Oracle data types script generation program is executed using the `PS_HOME` utility \PSORADDataTypesConversion.BAT file, which requires six input parameters:

- **THREADS:** The number of Java threads that the conversion script generation spawns to generate the scripts. We recommend 10 threads for running this program on Windows.

- **ACCESSID:** The access ID for the database to be converted.
- **ACCESSIDPW:** The access password for the database to be converted.
- **DBNAME:** The database name.
- **OUTPUTDIR:** A directory path to redirect the generated conversion scripts to a user-specified directory. This must be set to the PeopleSoft Change Assistant output directory for your upgrade pass. PeopleSoft Change Assistant will run the generated scripts later in the upgrade.
- **ORACLEVERSION:** The version of Oracle Connectivity that you are using (9, 10, or 11).

Example:

```
PS_HOME\utility\PSORADDataTypesConversion.bat 10 SYSADM SYSADM MYDB c:\upgrade=>
\output\Change_Assistant_job_directory 11
```

In the example command line above:

- **THREADS** = 10
- **ACCESSID** = SYSADM
- **ACCESSIDPW** = SYSADM
- **DBNAME** = MYDB
- **OUTPUTDIR** = c:\upgrade\output\Change_Assistant_job_directory
- **ORACLEVERSION** = 11

Open a command prompt window on the client workstation and execute the Oracle data types script generation program *PS_HOME\utility\PSORADDataTypesConversion.bat*. The program will display and write a log (PsOraCnv.log) to the directory specified by the **OUTPUTDIR** parameter indicating the status of the conversion program. Review PsOraCnv.log and ensure that the conversion scripts were generated cleanly.

For ANSI databases, only LONGTOLOBALTER conversion scripts are generated. For Unicode databases, four sets of scripts are generated: LONGTOLOBALTER conversion scripts, CLSDROPINDEXES scripts, CHARACTERLENGTHSEMANTICSALTER scripts, and CLSREBUILDINDEXES scripts.

After successfully running the conversion program, verify that the generated SQL scripts are located in the staging PeopleSoft Change Assistant output directory for your upgrade pass. Later in the upgrade, PeopleSoft Change Assistant will automatically run the SQL scripts later in the upgrade from the PeopleSoft Change Assistant output directory for your upgrade pass.

Properties

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

Task 3-23-16: Running Long to LOB Script 1

This step runs LONGTOLOBALTER1.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-17: Running Long to LOB Script 2

This step runs LONGTOLOBALTER2.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-18: Running Long to LOB Script 3

This step runs LONGTOLOBALTER3.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-19: Running Long to LOB Script 4

This step runs LONGTOLOBALTER4.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-20: Running Long to LOB Script 5

This step runs LONGTOLOBALTER5.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-21: Running Long to LOB Script 6

This step runs LONGTOLOBALTER6.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-22: Running Long to LOB Script 7

This step runs LONGTOLOBALTER7.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-23: Running Long to LOB Script 8

This step runs LONGTOLOBALTER8.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle long to LOB conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-24: Auditing the Long to LOB Conversion

This step runs L2LAUDIT.SQR to report on the output of the long to LOB conversion. You will review the report output in a later step.

Properties

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

Task 3-23-25: Running CLS Drop Indexes Script 1

This step runs CLSDROPINDEXES1.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-26: Running CLS Drop Indexes Script 2

This step runs CLSDROPINDEXES2.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-27: Running CLS Drop Indexes Script 3

This step runs CLSDROPINDEXES3.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-28: Running CLS Drop Indexes Script 4

This step runs CLSDROPINDEXES4.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-29: Running CLS Drop Indexes Script 5

This step runs CLSDROPINDEXES5.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-30: Running CLS Drop Indexes Script 6

This step runs CLSDROPINDEXES6.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-31: Running CLS Drop Indexes Script 7

This step runs CLSDROPINDEXES7.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-32: Running CLS Drop Indexes Script 8

This step runs CLSDROPINDEXES8.SQL, which was generated using PSORADDataTypesConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-33: Running Character Length Script 1

This step runs CHARACTERLENGTHSEMANTICSALTER1.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-34: Running Character Length Script 2

This step runs CHARACTERLENGTHSEMANTICSALTER2.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-35: Running Character Length Script 3

This step runs CHARACTERLENGTHSEMANTICSALTER3.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-36: Running Character Length Script 4

This step runs CHARACTERLENGTHSEMANTICSALTER4.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-37: Running Character Length Script 5

This step runs CHARACTERLENGTHSEMANTICSALTER5.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-38: Running Character Length Script 6

This step runs CHARACTERLENGTHSEMANTICSALTER6.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-39: Running Character Length Script 7

This step runs CHARACTERLENGTHSEMANTICSALTER7.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-40: Running Character Length Script 8

This step runs CHARACTERLENGTHSEMANTICSALTER8.SQL, which was generated using PSORADDataTypesConversion.bat. The Oracle character length semantics conversion scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-41: Running CLS Rebuild Indexes Script 1

This step runs CLSREBUILDINDEXES1.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-42: Running CLS Rebuild Indexes Script 2

This step runs CLSREBUILDINDEXES2.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-43: Running CLS Rebuild Indexes Script 3

This step runs CLSREBUILDINDEXES3.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-44: Running CLS Rebuild Indexes Script 4

This step runs CLSREBUILDINDEXES4.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-45: Running CLS Rebuild Indexes Script 5

This step runs CLSREBUILDINDEXES5.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-46: Running CLS Rebuild Indexes Script 6

This step runs CLSREBUILDINDEXES6.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-47: Running CLS Rebuild Indexes Script 7

This step runs CLSREBUILDINDEXES7.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-48: Running CLS Rebuild Indexes Script 8

This step runs CLSREBUILDINDEXES8.SQL, which was generated using PSORADDataTypesConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-23-49: Auditing Character Length Semantics

This step runs CLSAUDIT.SQR to report on the output of the character length semantics conversion. You will review the report output in a later step.

Properties

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

Task 3-23-50: Reviewing Conversion Reports

To review the conversion report for Microsoft, examine the log file from the step “Running the Microsoft Conversion Report.” It contains a list of unconverted columns on tables along with its old data type. Fields on tables with no PeopleSoft Application Designer definition will be included in this log. Any unresolved errors from the step “Running the Microsoft Conversion Script” will also be included. If you are using these tables, it is possible to update them manually to use the new data types with a SQL query tool or with an ETL tool. Be very cautious when changing a table, as this could result in data loss or affected functionality. Once any underlying problems have been resolved, you may rerun all of the previous steps in this task to reconvert any remaining objects listed by the audit report.

Note. During Move to Production passes for Microsoft, you must manually convert any remaining objects. During Move to Production passes, the record definition differs from the database table structure, so do *not* build the record with PeopleSoft Application Designer.

To review the conversion reports for Oracle, examine the log files from running the LONGTOLOBALTER*.SQL scripts. If the database is Unicode, also examine the log files for the CHARACTERLENGTHSEMANTICS*.SQL scripts. Review the output from the step “Auditing the Long to LOB Conversion.” L2LAUDIT.SQR reports on any unconverted long raw columns. The table name, column name, and column data type are listed. For Unicode databases, review the output from the step “Auditing Character Length Semantics.” CLSAUDIT.SQR reports on any unconverted character length columns (Unicode only). Correct any errors listed on the log files or conversion reports before proceeding with the upgrade. You can manually convert any tables listed in the audit, or resolve errors that led to the unconverted columns and rerun the conversion.

Properties

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

Task 3-23-51: Updating Database Options

This step runs UPGDBOPTIONS_ENABLE.SQL. This script updates the database to indicate that the new data types are now enabled.

Properties

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

Task 3-24: Converting Oracle Time Data Types

This section discusses:

- Understanding Oracle Time Data Types Conversion
- Backing Up Before Converting Data Types
- Creating Conversion Audit Tables
- Auditing Date to Timestamp Conversion
- Generating Timestamp Conversion Scripts
- Running Drop Indexes Script 1
- Running Drop Indexes Script 2
- Running Drop Indexes Script 3
- Running Drop Indexes Script 4
- Running Drop Indexes Script 5
- Running Drop Indexes Script 6
- Running Drop Indexes Script 7
- Running Drop Indexes Script 8
- Running Alter Timestamps Script 1
- Running Alter Timestamps Script 2
- Running Alter Timestamps Script 3

- Running Alter Timestamps Script 4
- Running Alter Timestamps Script 5
- Running Alter Timestamps Script 6
- Running Alter Timestamps Script 7
- Running Alter Timestamps Script 8
- Running Rebuild Indexes Script 1
- Running Rebuild Indexes Script 2
- Running Rebuild Indexes Script 3
- Running Rebuild Indexes Script 4
- Running Rebuild Indexes Script 5
- Running Rebuild Indexes Script 6
- Running Rebuild Indexes Script 7
- Running Rebuild Indexes Script 8

Understanding Oracle Time Data Types Conversion

In PeopleSoft PeopleTools 8.50, the TIMESTAMP data type is now supported for the PeopleSoft TIME and DATETIME field types. These data type changes are mandatory, and the DATE data type will no longer be used for the TIME and DATETIME fields.

PeopleSoft Change Assistant will display and run the steps in this task *only* if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

Task 3-24-1: Backing Up Before Converting Data Types

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

Important! Contact your database administrator to update the statistics on the database catalog. This will improve performance for subsequent steps in the upgrade. Typically, only the users sys and sysdba have the authority to perform this task.

The following command updates the statistics on the database catalog:

```
EXEC DBMS_STATS.GATHER_SCHEMA_STATS( 'SYS' );
```

Properties

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

Task 3-24-2: Creating Conversion Audit Tables

This step runs PRETSCNVADT1A.SQL, which drops and re-creates some temporary tables required by the pre-conversion audit SQRs. If the tables being dropped, DERIVEDPSSQLTABLEANDINDEX, DROP_FUNCIDX_CANDIDATES, and DERIVEDTABLESWITHFUNCINDEXES, don't exist, the execution of this script will generate the following error, which you can safely ignore:

```
ORA-00942: table or view does not exist
```

Properties

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

Task 3-24-3: Auditing Date to Timestamp Conversion

This step runs TSCAUDIT.SQR, which reports which columns by table are candidates for DATE to TIMESTAMP data type conversion.

Note. If this SQR needs to be rerun for any reason, you must run PRETSCNVADT1A.SQL before rerunning TSCAUDIT.SQR.

Properties

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

Task 3-24-4: Generating Timestamp Conversion Scripts

This section discusses:

- Understanding Timestamp Conversion Scripts
- Setting Parameters for the Database System Identifier
- Verifying Environment Variables
- Setting the Script Generation Parameters
- Executing the Script Generation Program

Understanding Timestamp Conversion Scripts

If you are performing your initial upgrade pass, complete all sections in this step to generate timestamp conversion scripts.

Important! During Move to Production passes, copy the DROPINDEXESn.SQL, ALTERNATESTAMPsn.SQL, and REBUILDINDEXESn.SQL scripts from your initial upgrade pass output directory and place them in the output directory for your Move to Production pass. Edit the REBUILDINDEXESn.SQL scripts and replace the database name in the create index statement with the Move to Production database name, if needed. These scripts can only be generated correctly during the initial pass. You can skip the remaining sections of this step, which only apply to the initial upgrade pass.

Setting Parameters for the Database System Identifier

Work with your database administrator to set init.ora parameters for the Target database's system identifier (SID). You must stop and restart the database SID for these settings to take effect.

To set the parameters:

1. Set the following init.ora parameters:

```
db_block_size=8192
db_cache_size=325165824
db_file_multiblock_read_count=8
job_queue_processes=10
shared_pool_size=425829120
pga_aggregate_target=5871947670
parallel_max_servers=8
workarea_size_policy=AUTO
```

Note. If you are using Oracle 10g or higher, you may use the parameters SGA_TARGET=300M and SGA_MAX_SIZE=350M instead of SHARED_POOL_SIZE, DB_CACHE_SIZE, and DB_BLOCK_BUFFERS.

2. Pre-allocate the PSTEMP tablespace to at least 10 GB.
3. Pre-allocate the PSDEFAULT tablespace to at least 2 GB with 10-MB local uniform extents.
4. Ensure that you have at least six redo logs sized at 500 MB each.

Verifying Environment Variables

The Oracle data types script generation program is a Java program that connects to an Oracle database. The prerequisites are Java and the Oracle JDBC Drivers.

The Java JDK required for this conversion program to run (Version 1.5) will automatically be picked up by the .bat file if the *PS_HOME* environment variable is set.

To verify whether the *PS_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %PS_HOME%;
```

This should return a path, for example:

```
c:\PSOFT\PT850
```

2. If the *PS_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET PS_HOME=PS_Home_location
```

The Oracle JDBC drivers will automatically be picked up by the .bat file provided that the *ORACLE_HOME* environment variable is set.

To verify whether the *ORACLE_HOME* environment variable is set:

1. At the workstation command prompt, enter the following:

```
echo %ORACLE_HOME%;
```

This should return a path, for example:

```
c:\oracle\product\10.1.0\client_1;
```

2. If the *ORACLE_HOME* environment variable is not set, then set it in the command prompt window by entering the following at the workstation command prompt:

```
SET ORACLE_HOME=Oracle_Home_location
```

Setting the Script Generation Parameters

You execute the Oracle data types script generation program using the *PS_HOME*\utility\PSORATimestampConversion.bat file, which requires six input parameters. Set the following parameters:

- ACCESSID: The access ID for the database to be converted.
- ACCESSIDPW: The access password for the database to be converted.
- DBNAME: The database name.
- OUTPUTDIR: A directory path to redirect the generated conversion scripts to a user-specified directory. This must be set to the PeopleSoft Change Assistant output directory for your upgrade pass. PeopleSoft Change Assistant will run the generated scripts later in the upgrade.
- SCRIPTQTY: The number of concurrent scripts to generate. This parameter is mandatory. The recommendation is 8.
- ORACLEVERSION: The version of Oracle Connectivity that you are using (9, 10, or 11).

Example:

```
PS_HOME\utility\PSORATimestampConversion.bat SYSADM SYSADM MYDB c:\upgrade\output⇒  
\Change_Assistant_job_directory 8 11
```

In the example command line above:

- ACCESSID = SYSADM
- ACCESSIDPW = SYSADM
- DBNAME = MYDB
- OUTPUTDIR = c:\upgrade\output\Change_Assistant_job_directory
- SCRIPTQTY = 8
- ORACLEVERSION = 11

Executing the Script Generation Program

Open a command prompt window on the client workstation and execute the Oracle data types script generation program *PS_HOME*\utility\PSORATimestampConversion.bat.

The program will display and write a log (PsTSOraCnv.log) to the directory specified by the OUTPUTDIR parameter indicating the status of the conversion program. Review PsOraCnvTS.log and ensure that the conversion scripts were generated cleanly.

For all databases, ANSI or Unicode, the following three sets of scripts are generated:

- DROPINDEXESn.SQL
- ALTERNESTAMPSn.SQL
- REBUILDINDEXESn.SQL

After successfully running the conversion script generation program, verify that the generated SQL scripts are located in the PeopleSoft Change Assistant output directory for your upgrade pass. Later in the upgrade, PeopleSoft Change Assistant will automatically run the SQL scripts from the PeopleSoft Change Assistant output directory for your upgrade pass.

Properties

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

Task 3-24-5: Running Drop Indexes Script 1

This step runs DROPINDEXES1.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-6: Running Drop Indexes Script 2

This step runs DROPINDEXES2.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-7: Running Drop Indexes Script 3

This step runs DROPINDEXES3.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-8: Running Drop Indexes Script 4

This step runs DROPINDEXES4.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-9: Running Drop Indexes Script 5

This step runs DROPINDEXES5.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-10: Running Drop Indexes Script 6

This step runs DROPINDEXES6.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-11: Running Drop Indexes Script 7

This step runs DROPINDEXES7.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-12: Running Drop Indexes Script 8

This step runs DROPINDEXES8.SQL, which was generated using PSORATimestampConversion.bat. All of the indexes in the script must be successfully dropped before altering tables. The drop indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-13: Running Alter Timestamps Script 1

This step runs ALTERNSTAMP1.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-14: Running Alter Timestamps Script 2

This step runs ALTERNSTAMP2.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-15: Running Alter Timestamps Script 3

This step runs ALTERNSTAMP3.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-16: Running Alter Timestamps Script 4

This step runs ALTERNSTAMP4.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-17: Running Alter Timestamps Script 5

This step runs ALTERNSTAMP5.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-18: Running Alter Timestamps Script 6

This step runs ALTERNSTAMP6.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-19: Running Alter Timestamps Script 7

This step runs ALTERNSTAMP7.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-20: Running Alter Timestamps Script 8

This step runs ALTERNETIMESTAMPS8.SQL, which was generated using PSORATimestampConversion.bat. The tables must be altered successfully before continuing on and rebuilding indexes. The Oracle DATE to TIMESTAMP alter scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-21: Running Rebuild Indexes Script 1

This step runs REBUILDINDEXES1.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-22: Running Rebuild Indexes Script 2

This step runs REBUILDINDEXES2.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-23: Running Rebuild Indexes Script 3

This step runs REBUILDINDEXES3.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-24: Running Rebuild Indexes Script 4

This step runs REBUILDINDEXES4.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-25: Running Rebuild Indexes Script 5

This step runs REBUILDINDEXES5.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-26: Running Rebuild Indexes Script 6

This step runs REBUILDINDEXES6.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-27: Running Rebuild Indexes Script 7

This step runs REBUILDINDEXES7.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-24-28: Running Rebuild Indexes Script 8

This step runs REBUILDINDEXES8.SQL, which was generated using PSORATimestampConversion.bat. The table alters must have successfully run prior to rebuilding indexes. The rebuild indexes scripts are designed to run concurrently to improve performance.

Properties

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

Task 3-25: Backing Up After the PeopleTools Upgrade

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

Properties

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

Task 3-26: Configuring the Scheduler and Server

Tips for configuring and starting the application server:

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

Tips for configuring and starting the process scheduler: Do not enable load balancing, setup a distribution server, or configure a report node for the Process Scheduler at this point in time of the upgrade. PeopleSoft Change Assistant parses the generated log files for errors within a single specified output directory. Review the Process Scheduler log/output directory that is defined within the PeopleSoft Change Assistant environment for any database with the Enable Process Scheduler check box selected.

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

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

Note. In addition, verify your PeopleSoft Change Assistant environment settings for the process scheduler and application server. Modify them as needed to match the servers that you just started.

Properties

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

CHAPTER 4

Running and Reviewing Compare Reports

This chapter discusses:

- Understanding Compare Reports
- Preparing for Application Changes
- Running the Alter Analyzer Loader
- Renaming Tables
- Running New Release Compare Reports
- Reviewing New Release Compare Reports

Understanding Compare Reports

Now that your Copy of Production database is at the same PeopleSoft PeopleTools release as your new release, you can compare the two databases to see the differences. In this chapter you run and review compare reports to make decisions regarding your upgrade. Be sure that you have plenty of space to run these reports, as some can be rather large.

Task 4-1: Preparing for Application Changes

This section discusses:

- Exporting Project Definitions
- Importing Project Definitions
- Running the DLPFUPN01 Drop Table Script
- Modifying UPGSYNCALL Compare Options
- Running Compare UPGSYNCALL
- Reviewing the UPGSYNCALL Compare Reports
- Copying the UPGSYNC Project
- Copying the UPGSYNC Project Definition
- Copying the UPGSYNCTEMP Project

Task 4-1-1: Exporting Project Definitions

In this step, you export from your Demo database the definition of projects that will be used later in this upgrade. This step is run in Initial and MTP, and so during MTP, the export is *not* run against the Demo database. You will import these definitions in the next step. Your export script is:

```
DLUPX08E.DMS
```

Properties

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

Task 4-1-2: Importing Project Definitions

In this step you will import the project definitions into your Copy of Production database. These projects will be used later in this upgrade. Your import script is:

```
DLUPX08I.DMS
```

Properties

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

Task 4-1-3: Running the DLPFUPN01 Drop Table Script

In this step, you drop tables to prevent errors in the step Building the Create and Alter Scripts. Some of these tables may contain data that will be lost when the table is dropped; however, this data is not needed for the application.

See "Applying Application Changes," Modifying the Database Structure, Building the Create and Alter Scripts. Since OWS tables are not upgraded, this data will be lost when the tables are dropped.

The script name is:

```
DLPFUPN01.dms
```

Properties

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

Task 4-1-4: Modifying UPGSYNCALL Compare Options

There are specific tables whose structure must match the record structure of the new PeopleSoft release. After the upgrade, the table's column sequence in the Copy of Production must match the record field sequence on the Demo database.

The following table lists the tasks involved in the synchronization of the two record structures, with descriptions of the actions taken for each task:

Task	Action Taken
Copy the UPGSYNC Project	Delete Table record definitions from the Copy of Production
Copy the UPGSYNCTEMP Project	Delete Temporary Table record definitions from the Copy of Production
Altering the UPGSYNC Records	Affected tables altered using “By Rename” option, forcing the column sequence to match the record definition.
Modifying the Database Structure	Affected Temporary tables recreated.

Because the Copy of Production record definitions will be deleted before the full database compare, you must identify your customizations on the affected records before those customizations are lost when the records definitions are deleted. In this step and the following two steps, you will perform these actions:

- Verify upgrade compare options and modify them based on your requirements.
- Run Compare UPGSYNCALL to generate record compare reports.
- Review the UPGSYNCALL compare reports to evaluate the effect of the project copies on your customizations.

The UPGSYNCALL project contains all of the records that are in projects UPGSYNC and UPGSYNCTEMP. You will not be *copying* project UPGSYNCALL to the Copy of Production. The only purpose of the UPGSYNCALL project is to allow you to identify your customizations.

You will reapply your customizations in the task Reapplying Customizations.

See "Completing Database Changes," Reapplying Customizations.

To modify upgrade compare options:

1. Highlight the Running Compare UPGSYNCALL step and right-click.
2. Select Step Properties.
The Step Properties dialog box appears.
3. Click Upgrade.
The Compare and Report dialog box appears.
4. Click Options.
5. Select the Report Filter tab.
The default options include your custom changes on the reports.
6. Change the default options as necessary.

Properties

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

Task 4-1-5: Running Compare UPGSYNCALL

This step generates record compare reports. Application Designer is used to compare the UPGSYNCALL project on your Copy of Production to the Demo database.

See Appendix: “Using the Comparison Process.”

Note. For Sybase customers only: check the configuration parameter for “open objects.” If this parameter is set too low, you may encounter the following error: “ct_connect(): network packet layer: internal net library error” during the compare or copy process. If you encounter this error, increase the value of this parameter.

Properties

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

Task 4-1-6: Reviewing the UPGSYNCALL Compare Reports

In this step, you review the UPGSYNCALL compare reports to evaluate the effect on your customizations.

The UPGSYNCALL project was compared in the previous step so that you can review the differences between the version of the records on the Demo database and your Copy of Production database. The compare process produced compare reports, which you can view by opening the project in Application Designer on the Demo database. Use the compare reports to determine if you have customized any of these records. Record definitions that you have changed will have *Changed or *Unchanged in the Target column of the compare report (the * means the change was not made by Oracle). Review these reports carefully. Note the changes you made to the records, and after the upgrade is complete and you are testing the system, decide whether you still need the customizations. You can reapply the customization at that time.

There may be records for which the Target column reads Absent. This indicates that you do not have the record on your Copy of Production database. You can ignore these records, because you are concerned only with customized records in this step.

Change Assistant saves the compare reports in the “Output” folder that you specified in your Change Assistant job “Database Configuration.” The file names are Upg00Records.prt and Upg00Records.idx.

Important! These same file names will be used in the full database compare later in the upgrade. To avoid losing the customization details, save the two compare report files in a separate folder before proceeding.

See Appendix: “Using the Comparison Process.”

Properties

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

Task 4-1-7: Copying the UPGSYNC Project

In this step, you copy the UPGSYNC project to the Copy of Production database. This will delete the record definitions for tables whose field sequence is critical. These records will be copied from the Demo database to your Copy of Production database when you run the Importing New Release Objects step. This project is used later in the upgrade in the Altering the UPGSYNC Records task.

See "Applying Application Changes," Running the New Release Upgrade Copy, Importing New Release Objects.

See "Applying Application Changes," Altering the UPGSYNC Records.

Properties

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

Task 4-1-8: Copying the UPGSYNC Project Definition

In this step, you copy the UPGSYNC project definition to the Copy of Production database. This project is used later in the upgrade, in the Altering the UPGSYNC Records task.

See "Applying Application Changes," Altering the UPGSYNC Records.

Properties

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

Task 4-1-9: Copying the UPGSYNCTEMP Project

In this step, you copy the UPGSYNCTEMP project to the Copy of Production database. This will delete the temporary table record definitions whose field sequence is critical. These records will be copied from the Demo database to your Copy of Production database when you run the Importing New Release Objects step.

See "Applying Application Changes," Running the New Release Upgrade Copy, Importing New Release Objects.

Properties

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

Task 4-2: Running the Alter Analyzer Loader

In this step, you run the PTALTDATLOAD Application Engine program. This process preserves the database structure from your current release in temporary tables to be used later in the upgrade.

Properties

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

Task 4-3: Renaming Tables

This section discusses:

- Understanding Renamed Tables
- Running the RNPFN01MSS Script
- Running the RNPFN01DB2 Script
- Running the RNPFN01DBX Script
- Running the RNPFN01ORA Script
- Running the RNPFN02MSS Script
- Running the RNPFN02DB2 Script
- Running the RNPFN02DBX Script
- Running the RNPFN02ORA Script

Understanding Renamed Tables

These SQL scripts rename tables, at the database level, to temporary table names. They do not change the Record Definition. These temporary tables will be used in the data conversion programs in a later step.

Near the end of the upgrade tasks, you will run a DDDAUDIT report again. On the report, these temporary tables will be listed in the section listing: “SQL Table defined in the Database and not found in the Application Designer.” Either at that point or later, when you are comfortable with the results of the data conversion, you can drop these temporary tables.

In some database platforms, the related indexes and views must be dropped before the table can be renamed. Oracle has included drop statements for these objects that exist on the Demo version of the database. However, the list of related objects may be different in your environment because of customizations or applied product incidents. You may encounter errors in these scripts because of these differences—for example, the script might try to drop an index or view that you do not have or it cannot rename a table because there are more related objects that need to be dropped. You can ignore these errors and proceed with the test pass. Simply modify these scripts to work for your database and you will not encounter these errors in your next test pass.

Task 4-3-1: Running the RNPFN01MSS Script

RNPFN01MSS.sql will rename tables on the Copy of Production database. This script is for SQL Server databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-3-2: Running the RNPFN01DB2 Script

RNPFN01DB2.sql will rename tables on the Copy of Production database. This script is for DB2 z/OS databases and will run in the initial and Move to Production passes.

During the Move to Production pass, you can ignore any errors indicating that view PS_BC_PE_FLDLST_VW or PS_BC_PE_LIST_VW does not exist, as these views will be recreated later in the chapter “Applying Application Changes,” task Finalizing the Database Structure.

Properties

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

Task 4-3-3: Running the RNPFN01DBX Script

RNPFN01DBX.sql will rename tables on the Copy of Production database. This script is for DB2 UDB for Linux, UNIX, or Windows databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-3-4: Running the RNPFN01ORA Script

RNPFN01ORA.sql will rename tables on the Copy of Production database. This script is for Oracle databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-3-5: Running the RNPFN02MSS Script

RNPFN02MSS.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for SQL Server databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-3-6: Running the RNPFN02DB2 Script

RNPFN02DB2.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for DB2 z/OS databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-3-7: Running the RNPFN02DBX Script

RNPFN02DBX.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for DB2 UDB for Linux, UNIX, or Windows databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-3-8: Running the RNPFN02ORA Script

RNPFN02ORA.sql will rename the PS_PF_OBJTYPE_DEFN, PS_PF_OBJTYPEA_SEQ and PS_PF_OBJTYPE_LNG tables on the Copy of Production database.

Note. The object type was renamed to dimension for the new release. Consequently the table names were changed. The old object type tables are converted to views and the data will be moved to the new dimension tables.

This script is for Oracle databases and will run in the initial and Move to Production passes.

Properties

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

Task 4-4: Running New Release Compare Reports

This section discusses:

- Understanding the New Release Compare
- Preserving the Local Message Node
- Running the New Release UPGCUST Compare
- Creating the UPGIB Project

Understanding the New Release Compare

In this task you will compare your customizations to the new release objects by running a project compare against the Demo database.

Task 4-4-1: Preserving the Local Message Node

In this step, you run the PTUPGMSGNODE Application Engine process to preserve the Local Message Node in the UPGCUST project before the project compare between the Copy of Production and Demo databases.

Properties

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

Task 4-4-2: Running the New Release UPGCUST Compare

This step executes a project compare of comparable objects in the UPGCUST project.

Properties

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

Task 4-4-3: Creating the UPGIB Project

This step creates a project on your New Release Demo database called UPGIB and executes a database compare of Integration Broker objects. This project will be used to copy new release Integration Broker objects to the Copy of Production and to delete obsolete Integration Broker objects from the Copy of Production.

Properties

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

Task 4-5: Reviewing New Release Compare Reports

This section discusses:

- Reviewing New Release Changes
- Reviewing Additional Upgrade Projects

Task 4-5-1: Reviewing New Release Changes

In this step, analyze the UPGCUST project and related compare reports. Select the Upgrade Flags for the customizations you wish to retain. This project may include object definitions that are on your Copy of Production database but not on the Copy of Current Demo database. Compare reports are viewable when you open the project in PeopleSoft Application Designer. You can use these reports to determine your copy action for each object in the project. By default, all Upgrade Flags in the project are deselected, meaning no action will take place.

If the Target column has the value *Absent* it can indicate one of two possible conditions. If Oracle originally delivered the object definition, then it can be considered obsolete in the new release. This value can also indicate that you originally created the object definition for some custom functionality. To ensure the integrity and functionality of the system, delete obsolete Oracle-delivered objects. If you have made a customization to an obsolete object, refer to the product's Release Notes to assess the functionality of the customization and determine where to reapply it in the new release.

See Appendix: "Using the Comparison Process."

Warning! Carefully review the compare results for URLs, permission lists, and message nodes. It is highly likely that you will want to keep any customizations that you have made to these objects. You will want to migrate your customized local message node. Please be sure to select the Upgrade Flags from within PeopleSoft Application Designer to retain these customizations.

Note. Steps in the database or third-party software installation documentation can result in Oracle-delivered objects being identified in the compare reports as **Changed* in the Source column. You should investigate all instances where objects are identified as **Changed* in the Source column to determine their origin and determine a plan of action based on the findings for each object.

Properties

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

Task 4-5-2: Reviewing Additional Upgrade Projects

In this step, analyze the UPGIB project and related compare reports, and the UPGNONCOMP project.

The UPGIB project is created in your Demo database by running a full database compare. It contains Integration Broker object definitions. The database compare produces compare reports that you can view by opening the project in PeopleSoft Application Designer. You can use these reports to determine your copy action for each object in the project. Analyze the UPGIB project and select the Upgrade Flags for the customizations you wish to retain.

If the Source column has the value *Absent* it can indicate one of two possible conditions. If Oracle originally delivered the object definition, then the object can be considered obsolete in the new release. Or, this value can indicate that you originally created the object definition for custom functionality. To ensure the integrity and functionality of the system, delete obsolete Oracle-delivered objects. If you have made a customization to an obsolete object, refer to the Release Notes for that product to assess the functionality of the customization and to determine where to reapply it in the new release.

The UPGNONCOMP project is delivered in your Demo database. It contains object definitions that cannot be compared using PeopleSoft Application Designer. The UPGNONCOMP project for your upgrade may contain some or all objects of the following object types: trees, access groups, roles, dimensions, cube definitions, and cube instance definitions. These object definitions are required for your upgraded database to function correctly. You need to review this project to see whether you customized any of the objects. You then need to reapply those customizations later in the upgrade.

See Appendix: "Using the Comparison Process"

Properties

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

CHAPTER 5

Applying Application Changes

This chapter discusses:

- Understanding Application Changes
- Running the New Release Upgrade Copy
- Updating Database Overrides
- Backing Up After the Upgrade Copy
- Preparing for Data Conversion Analysis
- Running the SQL Rename Tool
- Altering the UPGSYNC Records
- Modifying the Database Structure
- Loading Data for Data Conversion
- Applying Updates Before Data Conversion
- Running the Data Conversion Analyzer
- Backing Up Before Data Conversion
- Running Data Conversion
- Backing Up After Data Conversion
- Finalizing the Database Structure
- Preparing for Mass Compile of Metadata
- Loading Data to Complete System Setup
- Loading Personalizations
- Completing Application Conversion
- Updating Language Data
- Completing the PeopleTools Conversion
- Updating Object Version Numbers
- Running the Final Audit Reports

Understanding Application Changes

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

Task 5-1: Running the New Release Upgrade Copy

This section discusses:

- Exporting Selected PeopleTools Tables
- Importing Selected PeopleTools Tables
- Copying the UPGCUST Project
- Reviewing Copy Results
- Modifying Budgeting Subrecord BP_CF9B_AK_SBR
- Swapping PeopleTools Tables
- Updating Target Values
- Copying the UPGIB Project
- Copying the UPGNONCOMP Project
- Reviewing Project Copy Results
- Exporting New Release Objects
- Importing New Release Objects
- Resetting Object Version Numbers

Task 5-1-1: Exporting Selected PeopleTools Tables

Depending on your upgrade path you will need to export one or more PeopleSoft PeopleTools tables to preserve values on your Copy of Production database. This step exports PeopleSoft PeopleTools tables in the Copy of Production before the upgrade copy has occurred.

The script for your upgrade path is:

```
DLUPX96E.DMS
```

Properties

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

Task 5-1-2: Importing Selected PeopleTools Tables

Depending on your upgrade path you will need to import one or more PeopleSoft PeopleTools tables to preserve values on your Copy of Production database. This step imports PeopleSoft PeopleTools tables into the Demo database before the upgrade copy occurs.

The script for your upgrade path is:

```
DLUPX96I.DMS
```

Properties

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

Task 5-1-3: Copying the UPGCUST Project

This step copies your customized PeopleSoft PeopleTools and application objects from the Copy of Production database to your Demo database.

Properties

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

Task 5-1-4: Reviewing Copy Results

Review the results of the project copies that were performed in this task. For each of the projects copied, review the copy logs for any errors. Also, verify in PeopleSoft Application Designer that each of the projects copied shows the Done options are checked for those objects you expected to be copied.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. For example, if you chose not to copy a record definition, but neglected to clear the PeopleCode Upgrade check box for that record, you will receive errors when trying to copy the PeopleCode. PeopleSoft Application Designer maintains PeopleSoft PeopleTools integrity during the copy and will not copy PeopleCode for records that do not exist.

Review any errors you receive during the copy process and determine whether they are acceptable cases or unacceptable errors that need correction. In the example above, either the PeopleCode error is acceptable because you do not intend to copy the record definition, or the error is unacceptable and you should copy the record and then copy the PeopleCode for that record again.

You may get messages similar to “Warning: FIELDNAME is a key field and has been appended to the end of the RECORDNAME record.” This is an acceptable message and you can ignore it.

The following error occurs when copying a Portal Registry Structure that has a different PORTAL_OBJNAME but the same PORTAL_URLTEXT as an existing registry object.

```
Duplicate Key. Portal: portalname, Obj name: objectname, CP: nodename, URL (1st 50⇒
char): URL
```

Properties

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

Task 5-1-5: Modifying Budgeting Subrecord BP_CF9B_AK_SBR

For the new release, in the PeopleSoft Planning and Budgeting application, the following five fields changed to non-key fields on the BP_CF9B_AK_SBR subrecord:

- AFFILIATE_INTRA1
- AFFILIATE_INTRA2
- CHARTFIELD1
- CHARTFIELD2
- CHARTFIELD3

Not all fields on the BP_CF9B_AK_SBR subrecord can be activated as key fields. On the DB2 z/OS database platform, indexes have a limit of 255 characters. On the Oracle database platform, indexes can only have 32 index columns. If all dimensions were activated, then some indexes would exceed these limits and would not be created.

In the chapter “Preparing Your Database for Upgrade,” step Analyzing the Impact of BP_CF9B_AK_SBR Changes, you were asked to analyze your data and see which of the above fields may need to remain key fields. You need to implement these changes at this time. On your Source database, open the BP_CF9B_AK_SBR subrecord in PeopleSoft Application Designer and make the necessary modifications for your environment.

Note. After the upgrade, this change should be tracked and treated as a customization to your environment.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	Planning and Budgeting	All	All

Task 5-1-6: Swapping PeopleTools Tables

This step swaps the base language for tables that contain PeopleSoft PeopleTools Managed Object data and related-language data on your Demo database. This is in preparation for the step, “Exporting New Release Objects.” This script should only be run if your Copy of Production has a base language other than English. The script name for your upgrade path is:

```
PT_RELEASE_SWAP.DMS
```

If you would like to automate this step, follow the procedure below.

To make this step automated:

1. Select the step Swapping PeopleTools Tables in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.

3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	Non-English Base Language

Task 5-1-7: Updating Target Values

This step updates the Message Node table on the Demo database to keep the assignment of the Local Node defined in the Copy of Production. The update uses the copy of the Message Node table taken earlier in the upgrade.

The script for your upgrade path is:

```
DLUPX97.DMS
```

Properties

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

Task 5-1-8: Copying the UPGIB Project

This step copies new release Integration Broker objects from the Demo database to your Copy of Production database. This step also deletes obsolete Integration Broker objects from your Copy of Production database.

Properties

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

Task 5-1-9: Copying the UPGNONCOMP Project

In this step, copy the non-compare project, UPGNONCOMP. This project consists of object types you cannot compare and object types not included in your compare project. In a previous step, you reviewed this Oracle-delivered project and modified the Upgrade check box for any objects you did not want to copy.

Properties

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

Task 5-1-10: Reviewing Project Copy Results

Review the results of the UPGIB and UPGNONCOMP project copy steps that were performed earlier in this task. Review each copy log for any errors and verify in PeopleSoft Application Designer that the Done options are checked for the objects in each of the projects.

There are many different errors you can find in the copy logs, depending on which objects you chose to copy or not copy. Review any errors you received during the copy process to determine whether they are acceptable cases or unacceptable errors that need corrective action.

Properties

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

Task 5-1-11: Exporting New Release Objects

This step exports the new release objects and your customizations that you copied to the Demo database in an earlier step, to a file.

The script name for your upgrade path is:

```
PT_RELEASE_EXPORT.DMS
```

Properties

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

Task 5-1-12: Importing New Release Objects

This step imports the new release objects and your customizations into your Copy of Production database.

The script name for your upgrade path is:

```
PT_RELEASE_IMPORT.DMS
```

Properties

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

Task 5-1-13: Resetting Object Version Numbers

In this step, 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. You will rerun the VERSION Application Engine program later in the upgrade. If you want to preserve the log files generated by PeopleSoft Change Assistant from this run, you will need to manually rename the files after completing this step.

Properties

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

Task 5-2: Updating Database Overrides

This section discusses:

- Understanding Database Overrides
- Setting Index Parameters After Copy
- Setting Tablespace Names After Copy
- Setting Record Parameters After Copy
- Creating New Tablespaces

Understanding Database Overrides

In this task, you update PeopleSoft PeopleTools tables with DDL information from your physical database DDL. You may have overwritten information about where tables exist in your database during the copy project steps of this upgrade. The following steps synchronize your PeopleSoft PeopleTools table definitions with your database again.

In the new release, certain tables have moved from 4K to 32K page size tablespaces. Make sure that the EOTF_XREF_DATA table is created or altered in the 32K tablespace.

Task 5-2-1: Setting Index Parameters After Copy

This step updates index overrides stored in the PSIDXDDLARM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

SETINDEX.SQR

Properties

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

Task 5-2-2: Setting Tablespace Names After Copy

This step updates tablespace names stored in the PSRECTBLSPC table. In addition, the values stored in the DDLSPACENAME field are updated with current values found in the system catalog. If you modified tablespace names from the delivered names, this process makes those same changes in the PeopleSoft system record definition. It also corrects any tablespace names that were reset with values from the Demo database during the copy project step. The process then lists any tablespaces defined in the PeopleSoft PeopleTools tables that are not currently on your database. Use this report to create new tablespaces later in this task. The name of the process is:

SETSPACE.SQR

Note. This step updates both the database and tablespace names in the PSRECTBLSPC table for DB2 z/OS sites. The report produced by this process lists database/tablespace combinations that were not defined in the DB2 system catalog. The report may show your Demo database and tablespace names instead of your Copy of Production database and tablespace names. You will correct this situation when you create new tablespaces.

See Creating New Tablespaces.

Properties

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

Task 5-2-3: Setting Record Parameters After Copy

This step updates table overrides stored in the PSRECDDLARM table. The values stored in the PARMVALUE field are updated with the current values found in the system catalog. The name of the process is:

SETTABLE.SQR

Properties

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

Task 5-2-4: Creating New Tablespaces

This section discusses:

- Prerequisites
- Creating Delivered Tablespaces
- Creating Custom Tablespaces

Prerequisites

Before you perform this step, you must make sure that your database administrator has created all new tablespaces that will be used in new tables.

Note. DB2 z/OS sites need to create databases as well as tablespaces at this time.

Creating Delivered Tablespaces

If you use delivered tablespace names, be aware that there may be new ones in this release. The report that you produced when you set tablespace names after copying provides a list of tablespaces that are missing from your database.

See Setting Tablespace Names After Copy.

You need to create all the tablespaces on the report listed as missing on the database. Once you create all the tablespaces, you can rerun the SETSPACE.SQR; the report should show that no additional modifications are needed.

Note. For DBX sites, create all the tablespaces on the report listed as missing on the database in addition to the corresponding index (IDX) tablespace.

Oracle delivered a shell SQL script containing the DDL commands to create all the delivered tablespaces. Edit the script to create just the new tablespaces and to set up the script for your environment.

Note. Some tables were reassigned to larger tablespaces because they now require a 32-KB buffer pool. You must manually edit the Create Table statements in the upgrade scripts to replace the tablespace names with an appropriate tablespace name in your implementation that utilizes a 32-KB buffer pool.

The script supplied by Oracle to create tablespaces for your upgrade is:

- PFDDL.SQL for Oracle or DB2 z/OS ANSI
- PFDDL.U.SQL for DB2 z/OS Unicode
- PFDDL.DMS.SQL for DB2 UNIX/NT ANSI
- PFDDL.DMS.U.SQL for DB2 UNIX/NT Unicode
- PFDDL.SH for Informix

DB2 z/OS sites must also consider how database names are assigned. After the upgrade/copy is completed, some of the PeopleSoft PeopleTools metadata tables in your Copy of Production database will contain the database values from the Demo database. Review the SETSPACE SQR report for those tables that are reported as not defined in the database. If the report shows your Demo database names instead of your Copy of Production database names you can reset them with the following SQL:

```
UPDATE PSRECTBLSPC SET DBNAME = 'Copy of Production dbname'
WHERE DBNAME = 'Demo dbname'
```

Creating Custom Tablespaces

If you will use custom tablespaces, create those tablespaces now. Choose one of the following two methods to get the information into PeopleSoft PeopleTools:

- Update PeopleSoft PeopleTools for each record you will put into a custom tablespace. You can do this directly through PeopleSoft Application Designer, or you can update PSRECTBLSPC directly by using the appropriate SQL for your site, as follows:

DB2 z/OS sites:

```
UPDATE PSRECTBLSPC
SET DBNAME = 'new dbname', DDLSPACENAME = 'new tablespacename'
WHERE DBNAME = 'current dbname'
AND DDLSPACENAME = 'current tablespacename';
```

All other sites:

```
UPDATE PSRECTBLSPC
SET DDLSPACENAME = 'new tablespacename'
WHERE DDLSPACENAME = 'current tablespacename';
```

To update each table individually, add the following clause to the predicate of the above statement, making sure you use the record name in this clause:

```
AND RECNAME = record name
```

The SETSPACE report contains the table name. The record name will not have the “PS_” prefix.

You can double-check that you created all tablespaces by rerunning the SETSPACE.SQR report. If you created all tablespaces for records defined in PeopleSoft PeopleTools, the report will be empty.

- When you edit the Create and Alter scripts, you can change the SQL to create the tables in the correct tablespaces. Later in this task you will set tablespace names, which will update PeopleSoft PeopleTools with the correct tablespaces or database/tablespace in DB2 z/OS. The report should be empty at that time.

Note. For DB2 z/OS sites, the SETSPACE report may list some database/tablespace combinations as “Table Undefined - DB/TS OK” when in fact the database name is one that was defined for your Demo database. This occurs if your Demo and Copy of Production databases are in the same DB2 subsystem. The SETSPACE.SQR detected that the database/tablespace combinations do exist in the subsystem and are therefore valid. Make sure that you update these database/tablespace names to match those that exist in your Copy of Production, using the instructions above.

Note. During the Move to Production pass, you will create these tablespaces when you populate tablespace data. You can reuse this script, or you can create a new script for your production environment. To reuse the script you have created for this task, save it and copy it into the *PS_HOME\SCRIPTS* directory that you use during the Move to Production pass.

See the Enterprise PeopleTools installation guide for DB2 UDB for z/OS for your new release, “Creating a Database,” Correcting Invalid Database/Tablespace Combinations.

See Modifying the Database Structure, Editing the Create and Alter Scripts.

See Modifying the Database Structure, Setting Tablespace Names.

See “Applying PeopleTools Changes,” Populating Tablespace Data.

See “Applying Changes to the Production Database,” Performing the Move to Production.

Properties

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

Task 5-3: Backing Up After the Upgrade Copy

This section discusses:

- Backing Up Your Database After Upgrade Copy
- Backing Up the New Release Demo Again

Task 5-3-1: Backing Up Your Database After Upgrade Copy

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	Initial	All	All	All

Task 5-3-2: Backing Up the New Release Demo Again

Back up your New Release Demo 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
Source	Initial	All	All	All

Task 5-4: Preparing for Data Conversion Analysis

This section discusses:

- Populating the Initial Alter Analyzer Repository
- Populating the MTP Alter Analyzer Repository
- Copying the EOUF_UPGRADE_FRAMEWORK Project
- Building the EOUF_UPGRADE_FRAMEWORK Project
- Running the EOUF_UPGRADE_FRAMEWORK Script

Task 5-4-1: Populating the Initial 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	Initial	All	All	All

Task 5-4-2: Populating the MTP Alter Analyzer Repository

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. This task runs the PTALTANLYZER Application Engine program for the Move to Production pass. 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	MTP	All	All	All

Task 5-4-3: Copying the EOUP_UPGRADE_FRAMEWORK Project

This step copies the EOUP_UPGRADE_FRAMEWORK project from the Source database to the Target database. The EOUP_UPGRADE_FRAMEWORK project contains all objects that need to exist in the database in order for the Data Conversion analyzer to run properly. If there are custom fields in the Target database with the same name, they will be overridden.

Run this step only in the Initial pass. The project is copied in the task Preparing for Application Changes during the Move to Production passes.

See "Running and Reviewing Compare Reports," Preparing for Application Changes.

Properties

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

Task 5-4-4: Building the EOUP_UPGRADE_FRAMEWORK Project

This step generates the SQL script to create and alter tables and views delivered in the EOUP_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:

```
EOUP_UPGRADE_FRAMEWORK.SQL
```

Properties

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

Task 5-4-5: Running the EOUP_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 5-5: Running the SQL Rename Tool

This section discusses:

- Understanding the SQL Rename Tool
- Running the SQL Rename Tool for RNPFN01
- Running the SQL Rename Tool for RNPFN02

Understanding the SQL Rename Tool

In this task, the EOUFEXTRENAM Application Engine program populates the Alter Analyzer tables with additional information contained in the SQL scripts that you ran in the Renaming Tables task of the "Running and Reviewing Compare Reports" chapter. This information is used by EOUF0009.SQR to generate a Table Analysis Report.

See Appendix: "Using Data Conversion Utilities."

Task 5-5-1: Running the SQL Rename Tool for RNPFN01

This step runs the EOUFEXTRENAM Application Engine program to populate the Alter Analyzer tables with information about tables renamed by the RNPFN01xxx.SQL script, where xxx represents the three-letter code for your RDBMS platform.

Properties

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

Task 5-5-2: Running the SQL Rename Tool for RNPFN02

This step runs the EOUFEXTRENAM Application Engine program to populate the Alter Analyzer tables with information about tables renamed by the RNPFN02xxx.SQL script, where xxx represents the three-letter code for your RDBMS platform.

Properties

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

Task 5-6: Altering the UPGSYNC Records

This section discusses:

- Understanding UPGSYNC Records Alteration
- Building the UPGSYNC Alter Script
- Editing the UPGSYNC Alter Script
- Running the UPGSYNC Alter Script

Understanding UPGSYNC Records Alteration

In this task you will alter the records that are in the UPGSYNC project. These are records whose field sequence is critical. Not only must the recfield sequence on your database match that of the new PeopleSoft release database, but the associated table's column sequence must also match the record definition. In order to keep the physical table synchronized with the record definition, you will alter the tables using the "by rename" option.

Task 5-6-1: Building the UPGSYNC Alter Script

This step generates the SQL script to alter all records in the UPGSYNC project. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Obsolete columns will still exist on the tables after this script is executed, and will be dropped in the task titled, "Finalizing the Database Structure." The script is built using the "by rename" option in order to control column sequence. Do not change it to use the "in place" option. The script name is:

```
UPGSYNC_ALTTBL.sql
```

Note. You may see warning messages like this:

Warning: *record name* - alter failed because SQL table does not exist. (76,7)

These messages are returned because there are records in the UPGSYNC project that have no associated table in your database. Ignore these messages.

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

Properties

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

Task 5-6-2: Editing the UPGSYNC Alter Script

In this step, you will edit the SQL alter scripts for tablespace names and sizing. The script name for your upgrade path is:

```
UPGSYNC_ALTTBL.SQL
```

If you are running on a RDBMS platform that uses tablespaces and you are not using the PeopleSoft tablespace names, you will need to review and modify the scripts above. When the new record was copied to the Copy of Production database, the PeopleSoft default tablespace name was copied as well. When you created the tablespace, you were given the option to correct the tablespace names online or to wait and edit the scripts.

See Updating Database Overrides, Create New Tablespaces.

After you have completed running these scripts you will run the programs that synchronize the PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleTools definition. Have your DBA review these scripts and modify the tablespace names appropriately.

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors.

Properties

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

Task 5-6-3: Running the UPGSYNC Alter Script

In this step, you will run the SQL script you generated to alter the records in project UPGSYNC. This step will alter existing PeopleSoft table structures to use with your new PeopleSoft release. The script name for your upgrade path is:

UPGSYNC_ALTTBL.SQL

Properties

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

Task 5-7: Modifying the Database Structure

This section discusses:

- Understanding Modifying the Database Structure
- Backing Up for DB2
- Building the Upgrade Tables Script
- Re-Creating Upgrade Tables
- Creating the Upgrade Projects
- Building the Alter Temporary Tables Script
- Building the Optional Temporary Tables Script
- Creating the ALLTEMPTABS Project
- Building the Create Temporary Tables Script
- Creating the ALLTABS Project
- Building the Create and Alter Scripts

- Editing the Create and Alter Scripts
- Re-Creating Required Temporary Tables
- Re-Creating Optional Temporary Tables
- Creating Temporary Tables
- Creating Tables
- Altering Tables
- Creating Indexes
- Re-Creating Triggers
- Reviewing the Create Indexes Log
- Setting Index Parameters
- Setting Temporary Table Tablespace Names
- Setting Tablespace Names
- Setting Record Parameters
- Generating the DB2 UNIX RUNSTATS Script
- Updating Statistics for DB2 UNIX
- Updating Statistics for DB2 zOS
- Updating Statistics for Informix
- Updating Statistics for Oracle

Understanding Modifying the Database Structure

In this task you create and run various scripts and processes that will modify your database structure, including creating new tables and indexes, altering tables that have changed, and re-creating modified indexes.

Note. In the PeopleSoft Change Assistant job, some of the steps may complete without error, but display a Warning icon indicating that warning messages exist in the log file.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your new release, “Error Handling.”

Task 5-7-1: Backing Up for DB2

If you are using the DB2 z/OS platform, back up your database now. This enables you to restart your upgrade from this point if you should experience any database integrity problems during the remaining tasks in the upgrade process.

Properties

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

Task 5-7-2: 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 5-7-3: Re-Creating Upgrade Tables

This step runs the SQL script you generated to re-create all the 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 5-7-4: Creating the Upgrade Projects

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

In this step, you run the EOUFPOPPROJ Application Engine program. This program generates multiple project definitions and inserts record definitions into the generated projects in your Copy of Production database. Later in the upgrade, create and alter SQL scripts are generated for each of the projects created in this step.

Properties

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

Task 5-7-5: Building the Alter Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step generates the SQL script to drop and re-create the records of the type Temporary Table in the UPGCRTTMPTBL project. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCRTTMPTBL_CRTTBL.SQL
```

Note. This step is required.

Properties

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

Task 5-7-6: Building the Optional Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step generates a SQL script to drop and re-create the Temporary Table record type in the UPGCRTTMPTBLOPT project. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

```
UPGCRTTMPTBLOPT_CRTTBL.SQL
```

Note. This step is optional.

Properties

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

Task 5-7-7: Creating the ALLTEMPTABS Project

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step creates a project named ALLTEMPTABS and inserts all records of the type *Table*.

Properties

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

Task 5-7-8: Building the Create Temporary Tables Script

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step generates the SQL script to drop and re-create all the records of type Temporary Table in the database. Processes use the Temporary Tables dynamically in your system. They can be safely dropped at this time because they do not contain transaction data required by your PeopleSoft system.

The script name for your upgrade path is:

ALLTEMPTABS_CRTTBL.SQL

Properties

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

Task 5-7-9: Creating the ALLTABS Project

This step creates a project named ALLTABS and inserts all records of the type *Table*.

Properties

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

Task 5-7-10: Building the Create and Alter Scripts

This step generates the SQL script to create all new records of the type *Table*. The script name is:

ALLTABS_CRTTBL.SQL

This step generates the SQL script to alter all existing records of the type *Table*. This script is referred to as Alter Without Deletes. The tables are altered to add new columns, rename existing columns and change columns that have modified properties, such as length. Columns that will eventually be deleted will still exist on the tables after this script is executed. The script name is:

ALLTABS_ALTTBL.SQL

This step also generates the SQL script to create new indexes and to re-create modified indexes as needed for the tables in the first two scripts. The script name is:

ALLTABS_CRTIDX.SQL

Note. This step also creates the script ALLTABS_CRTTRG.SQL, which re-creates all database triggers. You do not need to run this script, because all database triggers will be created in the “Finalizing the Database Structure” task.

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

See Finalizing the Database Structure.

Properties

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

Task 5-7-11: Editing the Create and Alter Scripts

In this step, you will edit the SQL create and alter scripts for tablespace names and sizing. The script names for your upgrade path are:

ALLTABS_CRTTBL.SQL

ALLTABS_ALTTBL.SQL

ALLTABS_CRTIDX.SQL

The following scripts may or may not appear in your database. If these are present, edit them for tablespace names and sizing:

UPGCRTTMPTBL_CRTTBL.SQL

UPGCRTTMPTBLOPT_CRTTBL.SQL

ALLTEMPTABS_CRTTBL.SQL

If you are not using the PeopleSoft tablespace names, you will need to review and modify the scripts above. When the new record was copied to the Copy of Production database, the PeopleSoft default tablespace name was copied as well. When you performed the step, “Creating New Tablespaces,” you were given the option to correct the tablespace names online or to wait and edit the scripts. After you have completed running these scripts you will run the programs that synchronize the PeopleSoft PeopleTools definitions with the database catalog again. Therefore, any changes you make to the scripts now will be reflected in the PeopleSoft PeopleTools definition. Have your database administrator review these scripts and modify the tablespace names appropriately.

Many of the new tables and indexes will be populated during the upgrade. If they are not sized appropriately for your database, the conversion programs will stop with errors. After the upgrade is complete, you may want your database administrator to review and make adjustments to the amount of free space left in some of the tables or tablespaces.

Properties

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

Task 5-7-12: Re-Creating Required Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step runs the SQL script you generated to create records of the type *Temporary Table* in the UPGCRTTMPTBL project. The script name for your upgrade path is:

UPGCRTTMPTBL_CRTTBL.SQL

Properties

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

Task 5-7-13: Re-Creating Optional Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later.

This step runs the SQL script generated to create records of the type *Temporary Tables* in the UPGCRTTMPTBLOPT project.

The script name for your upgrade path is:

UPGCRTTMPTBLOPT_CRTTBL.SQL

Properties

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

Task 5-7-14: Creating Temporary Tables

PeopleSoft Change Assistant displays and runs this step only if you are upgrading from PeopleSoft PeopleTools 8.49 or earlier.

This step runs the SQL script you generated to create all the records of the type *Temporary Table*. The script name for your upgrade path is:

ALLTEMPTABS_CRTTBL.SQL

Properties

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

Task 5-7-15: Creating Tables

This step runs the SQL script you generated to create all the records of the type *Table*. This step creates new table structures in your database. The script name for your upgrade path is:

ALLTABS_CRTTBL.SQL

Properties

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

Task 5-7-16: Altering Tables

This step runs the SQL script you generated to alter the existing records of type *Table*. This step alters existing PeopleSoft table structures to comply with your new PeopleSoft release.

The script name for your upgrade path is:

ALLTABS_ALTTBL.SQL

Properties

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

Task 5-7-17: Creating Indexes

This step runs the SQL script you generated to create indexes on records of the type *Table*. This step creates or modifies indexes as required.

The script name for your upgrade path is:

ALLTABS_CRTIDX.SQL

Properties

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

Task 5-7-18: Re-Creating Triggers

This step executes the script CREATETRGR.DMS, which will re-create all PeopleSoft triggers in the database. The triggers on PeopleSoft tables were invalidated when the tables were altered and need to be re-created.

Properties

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

Task 5-7-19: Reviewing the Create Indexes Log

When PeopleSoft Change Assistant runs the create indexes script to create indexes, it will not stop when it encounters errors. When you view the log file, you will see that some indexes cannot be created due to unique index constraints. The data causing those indexes to fail will be updated during the task, “Running Data Conversion.” The indexes will then create successfully during the task, “Finalizing the Database Structure.”

Review the errors in the log file. Unique constraint errors are acceptable. If you see any other types of index creation errors, such as space problems, you must correct them before you continue with the upgrade. If you do not correct the errors, it may degrade your performance during data conversion.

The log file name for your upgrade path is:

```
ALLTABS_CRTIDX.LOG
```

See Running Data Conversion.

See Finalizing the Database Structure.

Properties

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

Task 5-7-20: Setting Index Parameters

This step updates index overrides stored in the PSIDXDDLPRM table. The values stored in the PARMVALUE field are updated with current values found in the system catalog. The name of the process is:

```
SETINDEX.SQR
```

Properties

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

Task 5-7-21: Setting Temporary Table Tablespace Names

This step populates the PeopleSoft PeopleTools table PSRECTBLSPC with the table name, database name, and tablespace name information for the temporary table instances created on the database in a previous step. This information will be required by processes that perform in-stream RUNSTATS (%UpdateStats) on the temporary table instances. The name of the process is:

```
SETTMPIN.SQR
```

Properties

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

Task 5-7-22: Setting Tablespace Names

This step populates all tablespace information in the PSRECTBLSPC table. The values stored in the DDLSPACENAM field are updated with current values found in the system catalog. If you modified tablespace names when you edited the SQL script that created your new tables from the delivered names, this will make those same changes in the PeopleSoft record definition. The name of the process is:

```
SETSPACE.SQR
```

Properties

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

Task 5-7-23: Setting Record Parameters

This step updates table overrides stored in the PSRECDDLPRM table. The values stored in the PARMVALUE field are updated with the current values found in the system catalog. The name of the process is:

```
SETTABLE.SQR
```

Properties

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

Task 5-7-24: Generating the DB2 UNIX RUNSTATS Script

This step executes the RUNSTATS.SQR that creates the RUNSTATS.SQL to update the statistics on DB2 UNIX/NT.

Properties

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

Task 5-7-25: Updating Statistics for DB2 UNIX

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again. Run the RUNSTATS.SQL script created in the previous step to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

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

Task 5-7-26: Updating Statistics for DB2 zOS

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

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

Task 5-7-27: Updating Statistics for Informix

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script.

Properties

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

Task 5-7-28: Updating Statistics for Oracle

Earlier in the upgrade process, you updated your statistics. Now that you have copied your new objects and created new indexes, update your statistics again to improve performance of your data conversions and generation of the Alter with Delete script. Contact your database administrator to have the statistics updated on your database before proceeding with your upgrade.

Properties

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

Task 5-8: Loading Data for Data Conversion

This section discusses:

- Swapping Languages on System Data
- Exporting Application Messages
- Importing Application Messages
- Exporting Record Groups
- Importing Record Groups
- Exporting the System Setup Data
- Importing the System Setup Data
- Exporting the PW Pagelet Data
- Importing the PW Pagelet Data
- Exporting the Pagelet Wizard Data
- Importing the Pagelet Wizard Data
- Exporting the Feed Data
- Importing the Feed Data
- Exporting Upgrade Defaults
- Importing Upgrade Defaults
- Exporting Data Conversion Driver Data

- Importing Data Conversion Driver Data

Task 5-8-1: Swapping Languages on System Data

This script swaps the base language for tables that contain system data on your Demo database and have related-language data, in preparation for the system data exports in the next step. This script should be run only if your Copy of Production has a base language other than English. The script name for your upgrade path is:

DLPFLASWAP.DMS

If you want to make this step automated, follow the steps below.

To make this step automated:

1. Select the step Swapping Languages on System Data in PeopleSoft Change Assistant.
2. Open the Step Properties dialog box.
3. Change the Type from *ManualStop* to *DataMoverUser*.
4. Click OK.
5. In your upgrade job, mark the step as Run.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Source	Initial	All	All	Non-English Base Language

Task 5-8-2: Exporting Application Messages

This step exports Application Messages data from the Demo database. The script name for your upgrade path is:

DLUPX01E.DMS

Properties

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

Task 5-8-3: Importing Application Messages

This step imports Application Message data into your Copy of Production database. Message Sets 0-999 are overlaid during the PeopleSoft PeopleTools Upgrade. Application Message Sets 1000-19,999 are overlaid with this task. If you have added custom messages in this set range, you must add those messages again at the end of the upgrade. To prevent this from happening in future maintenance or upgrades, add your custom messages in a set range of 20,000 or greater.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

DLUPX01I.DMS

Properties

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

Task 5-8-4: Exporting Record Groups

This step exports Record Group data from the Demo database. The script name for your upgrade path is:

DLUPX02E.DMS

Properties

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

Task 5-8-5: Importing Record Groups

This step imports Record Group data and populates Set Control data in your Copy of Production database. The following records are related to Record Groups and Set Control data:

- REC_GROUP_REC
- REC_GROUP_TBL
- SET_CNTRL_TBL
- SET_CNTRL_GROUP
- SET_CNTRL_REC
- SETID_TBL

The import script deletes from, and then reloads, the Record Group tables, REC_GROUP_REC and REC_GROUP_TBL. These are the tables that are modified when you use PeopleTools, Utilities, Administration, Record Group. The script then rebuilds the related setID tables, PS_SET_CNTRL_GROUP and PS_SET_CNTRL_REC. The PS_SET_CNTRL_TBL and PS_SETID_TBL tables contain the setIDs you use in your system; this script does not update PS_SET_CNTRL_TBL. However, it does check for orphan setID references in PS_SET_CNTRL_REC and adds the missing setIDs to PS_SETID_TBL.

If you have moved an Oracle-delivered record into a custom added record group, and deleted the record from the Oracle-delivered record group, this script will put the record back into the Oracle-delivered record group and remove it from the custom added record group.

If you have created a new record group, it will be deleted in this step if all of its records are assigned to Oracle-delivered record groups in the new release. To continue using your custom record group, you will need to re-create it in the Reapplying Customizations task.

This script creates an output file and uses it to create a temporary table. To run successfully, the PeopleSoft Configuration Manager input and output PeopleSoft Data Mover directories should be the same.

Note. If the script fails, verify that your Configuration Manager Profile output and input directories are set to the same location. If not, this could be the cause of the problem.

The script name for your upgrade path is:

DLUPX02I.DMS

Properties

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

Task 5-8-6: Exporting the System Setup Data

This script exports the contents of the Message, Strings, Stored Statements, Record Group, data conversion driver, EDI, and Mass Change tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran other scripts to load this data and in some cases had to reapply customizations. This script exports the entire contents of these tables, including customizations, so that you will not need to reapply them after the Move to Production. The script name for your upgrade path is:

MVAPPEXP.DMS

Properties

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

Task 5-8-7: Importing the System Setup Data

This script imports the data exported in the previous step into your New Copy of Production database during your Move to Production passes. This script replaces many scripts that you ran in the initial pass. It will move all data in these tables so that any customizations you have added to these tables during your initial pass will be moved to your New Copy of Production database. Also, it will rebuild the Set Control tables using the Record Groups from the Copy of Production database and your current Set Control values on the New Copy of Production database. The script name for your upgrade path is:

MVAPPIMP.DMS

Properties

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

Task 5-8-8: Exporting the PW Pagelet Data

This script exports the application-specific Pagelet Wizard pagelet definition, header, footer, and category tables from the Demo database in the initial pass. The script name for your upgrade path is:

DLUPX14E.DMS

Properties

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

Task 5-8-9: Importing the PW Pagelet Data

This script imports the application-specific data for the Pagelet Wizard pagelet definition, header, footer, and category tables into your Copy of Production database during the initial pass. This data is needed for the data conversion. The script name for your upgrade path is:

DLUPX14I.DMS

Properties

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

Task 5-8-10: Exporting the Pagelet Wizard Data

This script exports the contents of the Pagelet Wizard tables from the Copy of Production database during your Move to Production passes. During the initial pass, you ran programs and scripts to load this data and, in some cases, had to make changes. This script exports the entire contents of these tables, including changes, so that you will not need to reapply them after the Move to Production. This data is needed for the data conversion. The script name for your upgrade path is:

MVUPX16E.DMS

Properties

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

Task 5-8-11: Importing the Pagelet Wizard Data

This script imports the Pagelet Wizard tables from the Copy of Production database into the New Copy of Production during your Move to Production passes. This script replaces processes that you ran in the initial pass. It will move all data in the affected tables so that any changes you have made during your initial pass will be moved to your New Copy of Production database. This data is needed for the data conversion. The script name for your upgrade path is:

MVUPX16I.DMS

Properties

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

Task 5-8-12: Exporting the Feed Data

This script exports the application-specific Feed Definitions, Feed Data Type Definitions, and other Feed-related system data from the Demo database in the initial upgrade pass. The script name for your upgrade path is:

PTUPGPTFPEXP.DMS

Properties

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

Task 5-8-13: Importing the Feed Data

This script exports the application-specific Feed Definitions, Feed Data Type Definitions, and other Feed-related system data into your Copy of Production database during the initial upgrade pass. The script name for your upgrade path is:

PTUPGPTFPIMP.DMS

Properties

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

Task 5-8-14: Exporting Upgrade Defaults

This script exports the upgrade default data values and mapping during your Move to Production passes. This is the data that you set up during the chapter “Preparing Your Database for Upgrade” of your initial upgrade pass. You will load this information into your New Copy of Production later in the Move to Production upgrade pass. The script name for your upgrade path is:

MVPFNEXP.DMS

See “Preparing Your Database for Upgrade.”

Properties

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

Task 5-8-15: Importing Upgrade Defaults

This script imports the upgrade default data values and mapping that you set up during the chapter “Preparing Your Database for Upgrade,” of your initial upgrade pass. The script name for your upgrade path is:

`MVPFNIMP.DMS`

See “Preparing Your Database for Upgrade.”

Properties

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

Task 5-8-16: Exporting Data Conversion Driver Data

This step exports data conversion Application Engine driver data from the Demo database. The script name for your upgrade path is:

`DLUPX03E.DMS`

Properties

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

Task 5-8-17: Importing Data Conversion Driver Data

This step imports data conversion Application Engine driver data into your Copy of Production database.

The script name for your upgrade path is:

`DLUPX03I.DMS`

Properties

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

Task 5-9: Applying Updates Before Data Conversion

You should have downloaded and applied Required For Upgrade updates just after you installed your Demo 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 Demo 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. The project is now loaded on your Demo database. You should run a project compare to make sure 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 it to the Source database.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Change Assistant for your new 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.

Properties

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

Task 5-10: Running the Data Conversion Analyzer

In this task, you will run the EOUFANALYSIS Application Engine program. This program performs a detailed analysis of the data conversion code within the MAIN data conversion group for your upgrade path to determine the Source and Target Tables used in each Application Engine step. The data generated by this process is used later in the upgrade to calculate the table dependencies between the data conversion sections that are executed at runtime. Review the log file for any warnings or issues that were encountered in analyzing the data conversion code.

See Appendix: “Using Data Conversion Utilities.”

See Running Data Conversion

Properties

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

Task 5-11: 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 5-12: Running Data Conversion

This section discusses:

- Understanding Data Conversion
- Reviewing Data Conversion Tips
- Turning Trace On
- Performing Data Conversion Concurrently
- Turning Trace Off

Understanding Data Conversion

In this task you will populate new tables and columns. Earlier, you altered tables and added all new and modified columns. You did not, however, remove obsolete columns. The following steps will move data from the obsolete columns to the new columns and tables. Later in this chapter, in the task “Finalizing the Database Structure,” you will generate and run SQL to delete those obsolete columns.

Task 5-12-1: Reviewing Data Conversion Tips

This section discusses:

- Reviewing the Upgrade Driver Programs
- Using the Data Conversion Documentation
- Writing Data Conversion for Your Non-Oracle Records
- Reviewing Data Conversion Errors Expected During the Initial Upgrade Pass
- Reviewing Invalid Data Conversion Errors
- Restarting Data Conversion

Reviewing the Upgrade Driver Programs

UPG_DATACONV is an Application Engine program designed to run upgrade data conversions that are defined in the PRE and POST data conversion groups. Each time the program is run during an upgrade pass, PeopleSoft Change Assistant passes a group number parameter to the program. The program then reads the table PS_UPG_DATACONV, selecting all rows with that group number and ordering them by the sequence number on the row. A list of Application Engine library sections that must be run for data conversion is returned. The program then calls each section in the order of the sequence number. You can review the sections that are called by the Upgrade Driver program by accessing the Define Upgrade Drivers page on the Demo database.

EOUF_DATACONV is an Application Engine program designed to run upgrade data conversions that are defined in PS_UPG_DATACONV for the MAIN data conversion group. However, unlike UPG_DATACONV, EOUF_DATACONV leverages dependency analysis to optimize the runtime of the data conversion. Multiple instances of the EOUF_DATACONV Application Engine program are designed to be run in parallel to execute against a single set of dependency information.

Using the Data Conversion Documentation

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

See Appendix: “Using Data Conversion Utilities.”

Writing Data Conversion for Your Non-Oracle Records

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

See Appendix: “Using Data Conversion Utilities.”

Reviewing Data Conversion Errors Expected During the Initial Upgrade Pass

During your initial upgrade pass you can expect to have data conversion programs fail. This is because your PeopleSoft software installation is unique, which makes it difficult to write data conversions that will work for everyone all of the time. Your database may be larger than most, you may have customized Oracle-defined records, or you may not have copied all object deletions onto your Copy of Production. These differences will cause data conversion to fail. You must fix each problem on your initial Copy of Production and restart the Application Engine program. Your fixes will be automatically copied to your New Copy of Production during the Move to Production passes and data conversion will run smoothly.

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

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

Use the Find In feature of PeopleSoft Application Designer to determine which Application Engine programs affect your customized records.

To use the Find In feature:

1. Create a project and add all Application Engine programs and related objects that have a name starting with *UPG* and save the project.
2. Select Edit, Find In.
3. Enter each customized record name in the Find What field and your project name in the Project field.
4. Click Find.

The results will appear in the output window.

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

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

If you get a data conversion error because a field does not exist on a table, and the field is not one you have customized, check your field renames. If a field that appears on a record that is deleted in the new PeopleSoft release but was not deleted in your compare and copy, your table will be out of sync with what is expected by data conversion. If you had deleted the record, the rename would not happen on the physical table and the field would have the old name. This is what the data conversion program expects. If you did not delete the record, the field was renamed during the altering of tables and the data conversion program will terminate abnormally. Edit the Application Engine SQL to use the name, which is now on your table, and then restart the data conversion.

See Appendix: “Using the Comparison Process.”

Reviewing Invalid Data Conversion Errors

PeopleSoft Change Assistant may show a failure in the data conversion log window even though the data conversion step has been marked as complete. It is likely that the failure is being generated due to a set of messages within the log file. Those messages will be similar to the following:

```
rows updated on <field name> column of <record name>
```

First, inspect the log file and verify that the Application Engine program completed successfully. Then, verify whether you have messages in the format mentioned above that include the string “error.” If this is the case, proceed with the upgrade. If this is not the case, fix the issue on your Copy of Production and restart the program.

Restarting Data Conversion

Processes run via the PeopleSoft Change Assistant Application Engine step type, do not automatically rename the old log files on restart. Therefore, before restarting a data conversion step that is run via the PeopleSoft Change Assistant Application Engine step type, rename the log file. PeopleSoft Change Assistant uses the same log file name each time you start or restart an Application Engine program. This means that the restarted Application Engine program will replace the original log file if it is not renamed.

Processes run via the PeopleSoft Change Assistant Process Scheduler step type, automatically rename the old log files and create a new log file on restart. The PeopleSoft Change Assistant Log Viewer only displays the logs from the current run process. However, logs from the previous (unsuccessful) runs are retained and accessible in the PeopleSoft Change Assistant Log Directory.

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

See Finalizing the Database Structure.

Properties

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

Task 5-12-2: Turning Trace On

Set the Application Engine tracing level to include TraceAE = 16384 for the Process Scheduler prior to running data conversion. This allows details on Application Engine execution time for SQL steps and PeopleCode SQL statements to be collected. This information can be analyzed and used to tune long-running data conversion steps, as reported via EOUF0005.SQR.

See Appendix: “Using Data Conversion Utilities,” Understanding EOUFDATA CONV Reporting.

See Enterprise PeopleTools 8.50 PeopleBook: Application Engine, Tracing Application Engine Programs.

Properties

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

Task 5-12-3: Performing Data Conversion Concurrently

This step runs the EOUP_DATACONV Application Engine program for the MAIN data conversion group. After this step completes, you may want to run additional optional reports to obtain information about the data conversion such as execution and duration timings to help you optimize data conversion for your next upgrade pass.

See Appendix: "Using Data Conversion Utilities," Reviewing EO Upgrade Framework Reporting.

Properties

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

Task 5-12-4: Turning Trace Off

Prior to data conversion, Application Engine tracing level 16384 was enabled for the Process Scheduler. After running data conversion, turn off the Application Engine tracing for the Process Scheduler.

See *Enterprise PeopleTools 8.50 PeopleBook: Application Engine*, "Tracing Application Engine Programs."

Properties

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

Task 5-13: 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 5-14: Finalizing the Database Structure

This section discusses:

- Understanding the Final Database Structure
- Building the Alter with Deletes Scripts
- Altering Tables with Deletes
- Creating Indexes Again
- Creating Triggers
- Running the AE SYNCIDGEN Process
- Creating All Views

Understanding the Final Database Structure

Now that data conversion is complete, this task will alter the tables to remove obsolete columns, and create final indexes and views.

Task 5-14-1: Building the Alter with Deletes Scripts

This step uses the previously created project ALLTABS and generates three SQL scripts: one that will alter tables to drop obsolete columns, one that will also create any remaining indexes that could not be created with the first alter, and one that will create triggers. The script names are:

```
ALLTABS_DEL_ALTTBL.SQL
ALLTABS_DEL_CRTIDX.SQL
ALLTABS_DEL_CRTRRG.SQL
```

Important! All indexes should be created when the ALLTABS_DEL_CRTIDX.SQL script is run. When a unique index fails to be created, it is probably due to a data conversion issue. If a unique index fails to be created, you must resolve the issue and not simply remove the index. To prevent this issue, you can back up tables in the ALLTABS_DEL_ALTTBL.SQL script that will be dropping recfields that have data. This way, if you have an issue you may have the old fields and data that you need to correct it.

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

Properties

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

Task 5-14-2: Altering Tables with Deletes

This step executes the script ALLTABS_DEL_ALTTBL.SQL, which was generated in the previous step.

Properties

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

Task 5-14-3: Creating Indexes Again

This step executes the script ALLTABS_DEL_CRTIDX.SQL, which was generated in the previous step. All indexes should be created at this time.

Important! Review the log to find any unique indexes that might have failed to be created. All indexes should be created at this time, so those errors are not acceptable and should be corrected. When a unique index fails to be created, it is probably due to a data conversion issue.

Properties

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

Task 5-14-4: Creating Triggers

This step executes the script ALLTABS_DEL_CRTTRG.SQL, which was generated in a previous step.

Properties

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

Task 5-14-5: Running the AE SYNCIDGEN Process

This step executes the AE_SYNCIDGEN Application Engine program to regenerate synchronization IDs. PeopleSoft PeopleTools uses synchronization IDs to give each row a unique identifier. For any tables with the Sync ID column set to the default value of zero, the AE_SYNCIDGEN program will populate the column with the next valid Sync ID value.

Properties

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

Task 5-14-6: Creating All Views

This step runs CREATEVW.DMS to re-create all views in the Copy of Production database. The script will try to create every view in Application Designer. If there is an error on one view, it will keep going until it gets to the end of the list.

Important! Review the log to find any views that failed to be created. All views should be created at this time, so those errors are not acceptable and should be corrected.

Properties

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

Task 5-15: Preparing for Mass Compile of Metadata

This section discusses:

- Understanding Mass Compile of Metadata
- Loading System Data into Upgrade Table
- Reviewing New System Metadata
- Reviewing Changed System Metadata
- Reviewing Customized System Metadata
- Deleting System Metadata
- Removing Duplicate Data
- Cleaning Metadata and Search Table Data

Understanding Mass Compile of Metadata

In this task, you prepare for the mass compile of metadata by performing the following steps:

1. Load system data into upgrade table
2. Review new system metadata
3. Review customized system metadata
4. Delete system metadata
5. Clean metadata and search table

The system metadata reviews are needed because any customizations you made to the system metadata will be deleted when the system metadata is deleted in the final step in this task. You will need to reapply your system metadata customizations after you complete the upgrade.

The system metadata is reloaded in a later step.

See Loading Data to Complete System Setup, Importing Application System Data.

Task 5-15-1: Loading System Data into Upgrade Table

This PeopleSoft Data Mover script loads the following system data into the PF_MD_UPGRADE table:

- Record metadata
- TableMaps
- DataMaps
- Expressions
- Constraints
- Filters
- DataSets
- Jobstreams
- Jobs
- Engines
- Reports
- Rules

The script name for your upgrade path is:

UPPFN07.DMS

Properties

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

Task 5-15-2: Reviewing New System Metadata

This script reports system metadata that is new in this release and was not present in your previous PeopleSoft release. The results from this script are for your information only; no further action is needed.

PS_HOME\SCRIPTS\UPPFX02.SQL

Properties

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

Task 5-15-3: Reviewing Changed System Metadata

This script reports system metadata that were previously delivered but have been changed by the user. The results from this script are for your information only; no further action is needed.

PS_HOME\SCRIPTS\UPPFX03.SQL

Properties

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

Task 5-15-4: Reviewing Customized System Metadata

This script reports system metadata that is new in this release and is customized on your database. If you customized system metadata, you will lose your changes during the upgrade. You will need to reapply your customizations after you complete the upgrade. Save the script results, as you will need them to reapply customizations to system metadata later in the upgrade process.

PS_HOME\SCRIPTS\UPPFX04.SQL

Properties

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

Task 5-15-5: Deleting System Metadata

This Application Engine program PF_MD_UPGRAD deletes system metadata from the data tables controlling PeopleSoft Enterprise Warehouse metadata. System metadata will be reloaded in a later step.

See Loading Data to Complete System Setup, Importing Application System Data.

Properties

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

Task 5-15-6: Removing Duplicate Data

This script deletes any data necessary to avoid duplicates when the system metadata is reloaded later in the upgrade. The script name for your upgrade path is:

UPPFX08.DMS

Properties

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

Task 5-15-7: Cleaning Metadata and Search Table Data

This PeopleSoft Data Mover script deletes all orphaned metadata and search table data. This script also deletes old Vantive constraints and filters. The script name for your upgrade path is:

UPPFX09.DMS

Properties

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

Task 5-16: Loading Data to Complete System Setup

This section discusses:

- Exporting Strings
- Importing Strings
- Exporting EDI Statements
- Importing EDI Statements
- Exporting Mass Change Data
- Importing Mass Change Data
- Exporting XML Service Information
- Importing XML Service Information
- Exporting Related-Language System Data
- Importing Related-Language System Data
- Exporting Application System Data
- Importing Application System Data
- Exporting Dimension Metadata System Data
- Importing Dimension Metadata System Data
- Exporting Common Portal System Options
- Importing Common Portal System Options

- Exporting Setup Data
- Importing Setup Data
- Setting Portal System Options
- Setting Menu Pagelet Values

Task 5-16-1: Exporting Strings

This script exports Strings data from the Demo database. The script name for your upgrade path is:

`DLUPX04E.DMS`

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 5-16-2: Importing Strings

This script imports Strings data into the Copy of Production database. The script name for your upgrade path is:

`DLUPX04I.DMS`

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

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

Task 5-16-3: Exporting EDI Statements

This script exports EDI Statements from the Demo database. The script name for your upgrade path is:

`DLUPX05E.DMS`

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

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

Task 5-16-4: Importing EDI Statements

This script imports the EDI Statements into the Copy of Production database. The script name for your upgrade path is:

DLUPX05I.DMS

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

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

Task 5-16-5: Exporting Mass Change Data

This script exports Mass Change tables from the Demo database. The script name for your upgrade path is:

DLUPX06E.DMS

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 5-16-6: Importing Mass Change Data

This script imports Mass Change tables into the Copy of Production database. The script name for your upgrade path is:

DLUPX06I.DMS

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

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

Task 5-16-7: Exporting XML Service Information

This script exports XML service data from the Demo database. The script name for your upgrade path is:

DLUPX13E.DMS

This data will be exported during Move to Production by the script MVPRDEXP.DMS.

Properties

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

Task 5-16-8: Importing XML Service Information

This script imports XML service data into the Copy of Production database. The script name for your upgrade path is:

DLUPX13I.DMS

This data will be imported during Move to Production by the script MVPRDIMP.DMS.

Properties

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

Task 5-16-9: Exporting Related-Language System Data

This script exports system data from various application-related language tables in your Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into your Copy of Production. The script name for your upgrade path is:

DLPFLASYSE.DMS

Note. During Move to Production passes you can reuse the data files that are created by this export script. Preserve this DAT file, and set the Type of Upgrade property in the PeopleSoft Change Assistant template to Initial Upgrade for this step.

Properties

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

Task 5-16-10: Importing Related-Language System Data

This script will delete old related-language system data from related-language tables. The script then imports the data exported by the scripts above. The script name for your upgrade path is:

DLPFLASYSI.DMS

Properties

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

Task 5-16-11: Exporting Application System Data

This script exports system data from various application tables from the Demo database into a PeopleSoft Data Mover *.DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

DLPFSE.DMS

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, change the Type of Upgrade from Both to Initial Upgrade in the step properties and save the job.

Properties

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

Task 5-16-12: Importing Application System Data

This script imports the application system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

DLPFYSI.DMS

Note. Some of the data will be imported using the *ignore dups* option. These data loads will give the message “Error: duplicate SQL rows” and then give a “Successful completion” message. These error messages can be ignored because duplicate data is expected.

Properties

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

Task 5-16-13: Exporting Dimension Metadata System Data

This script exports system data from dimension metadata tables from the Demo database into a PeopleSoft Data Mover .DAT file. In a later step, this data will be loaded into the Copy of Production database. The script name for your upgrade path is:

DLPF01E.DMS

Note. During Move to Production passes, you can reuse the data files that are created by this export script. To do this, preserve the .DAT file and set the “Type of Upgrade” property in the Change Assistant template to Initial Upgrade for this step.

Properties

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

Task 5-16-14: Importing Dimension Metadata System Data

This script imports the dimension metadata system data, exported in the previous step, into the Copy of Production database. The script name for your upgrade path is:

```
DLAFX01I.DMS
```

Note. Some of the data will be imported using the “ignore dupes” option. These data loads will give the message “Error: duplicate SQL rows” and then give a “Successful completion” message. These error messages can be ignored because duplicate data is expected.

Properties

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

Task 5-16-15: Exporting Common Portal System Options

This script exports the contents of the Common Portal System Options table from the Demo database. The script name for your upgrade path is:

```
DLEOX01E.DMS
```

Properties

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

Task 5-16-16: Importing Common Portal System Options

This script imports the Common Portal System Options data into your Copy of Production database. The script name for your upgrade path is:

```
DLEOX01I.DMS
```

Properties

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

Task 5-16-17: Exporting Setup Data

This script exports setup data from the Demo database. The script name for your upgrade path is:

`DLUPX16E.DMS`

This data will be exported during Move to Production by the script MVAPPEXP.DMS.

Properties

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

Task 5-16-18: Importing Setup Data

This script imports setup data into the Copy of Production database. The script name for your upgrade path is:

`DLUPX16I.DMS`

This data will be imported during Move to Production by the script MVAPPIMP.DMS.

Properties

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

Task 5-16-19: Setting Portal System Options

This step runs a script to enable the SWAN look and feel on your system and the new grid defaults. The script name for your upgrade path is:

`DLUPX25.DMS`

Properties

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

Task 5-16-20: Setting Menu Pagelet Values

This script replaces the menu navigation pagelet with the "Top Menu Features" pagelet. The script name for your upgrade path is:

PTREMOVEMENUPGLT.DMS

Properties

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

Task 5-17: Loading Personalizations

This section discusses:

- Exporting Personalizations
- Importing Personalizations

This task loads PeopleSoft Enterprise Performance Management personalizations system data into the Copy of Production database.

Task 5-17-1: Exporting Personalizations

This step exports personalizations from the Demo database. The script name is:

DLPFX10E.DMS

Properties

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

Task 5-17-2: Importing Personalizations

This step imports personalizations into the Copy of Production database. The script name is:

DLPFX10I.DMS

Properties

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

Task 5-18: Completing Application Conversion

This section discusses:

- Updating Driver IDs

Task 5-18-1: Updating Driver IDs

Run the following script to update BP_DRIVER_ID values:

```
DLBGN01.DMS
```

This script replaces the previously delivered BP_DRIVER_ID values with new BP_DRIVER_ID values.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Planning and Budgeting	All	All

Task 5-19: Updating Language Data

This section discusses:

- Understanding Updating Language Data
- Running the TSRECPOP Script

Understanding Updating Language Data

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

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

Task 5-19-1: Running the TSRECPOP Script

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

Properties

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

Task 5-20: Completing the PeopleTools Conversion

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

Properties

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

Task 5-21: 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 5-22: 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 5-22-1: 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 5-22-2: 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 5-22-3: 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 5-22-4: 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 5-22-5: 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 5-22-6: Running the Final SETINDEX Report

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

Properties

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

Task 5-22-7: Running the Final SETTABLE Report

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

Properties

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

CHAPTER 6

Completing Database Changes

This chapter discusses:

- Understanding Database Changes
- Configuring the Upgrade Environment
- Reapplying Customizations
- Setting Up Security
- Completing Portal Data Conversion
- Reviewing PeopleTools Functionality
- Enabling Oracle Transparent Data Encryption
- Defining Source System IDs
- Refreshing User Defined Ledger Template
- Reviewing Application Message Settings
- Upgrading Project Request Milestones
- Activating Security Groups
- Upgrading Consolidation Processes
- Upgrading Workforce Analytics
- Synchronizing Metadata
- Upgrading Legacy Business Unit Mappings
- Upgrading GC Journal Publish Mapper Rules
- Fixing Scorecard User Security
- Fixing Scorecard User Defaults
- Fixing KPI Assessment Images
- Updating KPI Descriptions
- Installing the EPM Charting Tool
- Preparing the Content Provider Registry
- Updating the Portal Options Data
- Stamping the Database
- Reviewing Change Control
- Backing Up Before Testing

- Testing Your Copy of Production

Understanding Database Changes

Many changes were made in the previous chapters of this documentation. In this chapter, you complete these changes so that you can begin testing your Copy of Production. By testing your Copy of Production, you ensure that you can still operate day-to-day processes on your new PeopleSoft release.

Task 6-1: Configuring the Upgrade Environment

This section discusses:

- Configuring the Web Server
- Configuring Portal

Task 6-1-1: 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 6-1-2: 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 6-2: Reapplying Customizations

This section discusses:

- Understanding the Reapplication
- Performing Customized Object Adjustment
- Registering Portal Navigation Objects

Understanding the Reapplication

In this task, you work with your customized objects to ensure that they are properly integrated into your upgraded database.

Task 6-2-1: Performing Customized Object Adjustment

When you reviewed your upgrade compare reports, you decided whether to take the Source or Target version of the objects. If you took the Oracle-delivered version of an object instead of your own customized version, you may need to customize the new objects to get the blend of new standard features and your custom features. In complex cases, this may take several iterations. You need to make manual adjustments to the objects to apply these customizations.

Reapply any Mass Change or EDI customizations.

See “Planning Your Application Upgrade,” Identifying Customizations.

Be aware that you must not overwrite Oracle-loaded data. The customizations, extracted during an earlier step, must be manually applied now.

In another step, you reviewed some customizations that would be removed by the upgrade.

See “Running and Reviewing Compare Reports,” Preparing for Application Changes, Reviewing the UPGSYNCALL Compare Reports.

If you have customizations that need to be reapplied, manually reapply them now.

In another step, you applied the Oracle-delivered record group assignments.

See “Applying Application Changes,” Loading Data for Data Conversion, Importing Record Groups.

If you maintain any custom record group assignments, reapply them to your Copy of Production database now.

During Move to Production passes, you will not need to reapply these customizations. The changes you make now will be copied to any subsequent Copy of Production database using PeopleSoft Data Mover scripts.

Properties

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

Task 6-2-2: Registering Portal Navigation Objects

You must register your customized objects, such as menus and components, to access them in Portal. You can use the Registration Wizard or the Menu Import process to grant access to the appropriate components. Make sure that you register your components for all of your portals (for example, Customer, Supplier, Employee, and so forth). Also, make sure that you select the node name that matches the database. Do not use the Local node.

See the Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer Developer’s Guide for your new release, “Using the Registration Wizard.”

See the Enterprise PeopleTools PeopleBook: PeopleTools Portal Technology for your new release, “Administering Portals.”

Properties

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

Task 6-3: Setting Up Security

This section discusses:

- Understanding Security
- Performing Security Setup
- Synchronizing CREF Permissions
- Granting Access to Personalize the Homepage

Understanding Security

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

Task 6-3-1: Performing Security Setup

This section discusses:

- Understanding Security Setup

Understanding Security Setup

Select the PeopleTools, Security folder now to add the new PeopleSoft PeopleTools and application menus, delete old menus, and set up appropriate operator security for your system.

Many menu additions and deletions have occurred. Examine the menu compare report and the Demo database for details of the required security changes, then decide which of your roles and permission lists should have access to each of the new menus.

Many tasks in this chapter instruct you to select a specific menu within the new PeopleSoft release. To perform these tasks, set up appropriate security for each of the menus referenced in each of the tasks.

See the PeopleSoft Enterprise Portal Solutions PeopleBook: Portal and Site Administration for your new release, information on PeopleSoft-delivered security.

Note. Move to Production: If you changed the user profiles in your production system after you froze your PeopleSoft PeopleTools, you must manually apply the changes to your Copy of Production database before the end of the final Move to Production.

Properties

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

Task 6-3-2: Synchronizing CREF Permissions

This section discusses:

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

Understanding Content Reference Permissions

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

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

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

Running the Portal Security Synchronization Process

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

To run the security synchronization process:

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

See the Enterprise PeopleTools PeopleBook: PeopleTools Portal Technology for your new release.

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

Properties

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

Task 6-3-3: Granting Access to Personalize the Homepage

This section discusses:

- Understanding Access to the Portal Homepage
- Updating the Homepage Personalization Permission List
- Adding the Portal User Role

Understanding Access to the Portal Homepage

You must complete this step if you use any of the PeopleSoft Portal Pack products or pagelets. To add, remove, or change the layout of the homepage, you must grant homepage personalization security access to all non-guest users.

Updating the Homepage Personalization Permission List

To update the homepage personalization permission list:

1. Using PeopleSoft Data Mover, sign in to the Target database.
2. Open the PeopleSoft Data Mover script *PS_HOME\SCRIPTS\PORTAL_HP_PERS.DMS*.
3. Run this script against the Target database.
4. Close PeopleSoft Data Mover.

Adding the Portal User Role

To add the Portal User Role to the user IDs:

1. Using PeopleSoft Data Mover, sign in to the Target database.
2. Open the PeopleSoft Data Mover script *PS_HOME\SCRIPTS\PORTAL_ADD_ROLE.DMS*.
3. Run this script against the Target database.
4. Close PeopleSoft Data Mover.

Note. You should grant the PAPP_USER role to all new user IDs for access to the homepage personalization. After running this script, manually remove the role PAPP_USER from any GUEST user ID, because a GUEST user should not be personalizing the common homepage.

Properties

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

Task 6-4: Completing Portal Data Conversion

This section discusses:

- Reviewing the Pagelet and Collection Log
- Enabling Pagelet Publishing

Task 6-4-1: Reviewing the Pagelet and Collection Log

This section discusses:

- Correcting Logged Issues
- Running UPGPT846PP Again

This step explains how to correct logged issues for Navigation Collections, Portal Registry objects, and Pagelet Wizard objects.

Note. Perform this step only if there are logged issues that need to be resolved for Navigation Collections, Portal Registry Objects, or Pagelet Wizard objects reported from the UPGPT846PP process.

Correcting Logged Issues

Review the log from running the data conversion UPGPT846PP Application Engine program in the task titled, "Completing the PeopleTools Conversion." Correct the issues from the log using the instructions in the MAIN section comments of the UPGPT846PP program. These instructions were reported in the chapter "Applying PeopleTools Changes" task Converting PeopleTools Objects in the Reporting Conversion Details step.

See "Applying Application Changes," Completing the PeopleTools Conversion.

See "Applying PeopleTools Changes," Converting PeopleTools Objects, Reporting Conversion Details.

Running UPGPT846PP Again

In this step, you run the UPGPT846PP process again.

Note. The Application Engine process UPGPT846PP can be run repeatedly, if necessary, as you resolve data issues.

To run UPGPT846PP again:

1. Run the Application Engine conversion process UPGPT846PP with the upgrade user ID.

The program can be run from the command line with the following:

```
$PS_HOME\bin\client\winx86\psae -CD dbname -CT dbtype -CS dbservername -CO =>
oprld -CP oprpswd -R 1 -AI UPGPT846PP
```

2. Review the log file according to the instructions in the previous step.
3. If there are any remaining issues, correct them and rerun UPGPT846PP.
4. Repeat steps 2 and 3, if necessary, until there are no remaining issues for Navigation Collections, Portal Registry objects, or Pagelet Wizard objects.

Properties

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

Task 6-4-2: Enabling Pagelet Publishing

This step enables the creation of homepage pagelets for Navigation Collections and Pagelet Wizard. The script name for your upgrade path is:

```
PTPP_PORTAL_PACK.DMS
```

Properties

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

Task 6-5: Reviewing PeopleTools Functionality

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

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

To review the PeopleSoft PeopleTools Release Notes, go to My Oracle Support and search for the PeopleSoft PeopleTools Release Notes for your new release.

You should review the following considerations:

- If you applied a PeopleSoft PeopleTools patch earlier in the upgrade, review the patch documentation and run any steps that you have not already performed during the upgrade.

Check your PeopleSoft Change Assistant output directory if you do not know whether a script was already run during the upgrade process.

- Oracle has updated the styles that define the look of the user interface.

Three user interface options were delivered with your current release of PeopleSoft 8.x. Pre-8.50 PeopleSoft PeopleTools system databases and PeopleSoft 8.4 applications use the classic style, whereas all other applications use the new dark blue style. The classic and light blue styles are considered deprecated as of PeopleSoft PeopleTools 8.50. The dark blue style is set as the default during the PeopleSoft PeopleTools portion of the upgrade, but you have the option to change the user interface style.

See Appendix: “Changing the User Interface.”

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

- PeopleSoft PeopleTools uses Verity release 5.0 to implement free text search.

Verity 5.0 is not compatible with the version of Verity that was used in previous PeopleSoft PeopleTools releases. Check the necessary application patches that may be required to use the new version of Verity.

To check for required patches, go to My Oracle Support, select Patches & Updates, PeopleSoft, and search for PeopleTools Required for Upgrade patches for Verity.

- Integration Broker was rewritten in PeopleSoft PeopleTools 8.48.

If you use Integration Broker, you will need to perform setup configuration and review the explanation of metadata mapping.

See Enterprise PeopleTools PeopleBook: Integration Broker, Appendix: “Understanding Migrated Integration Metadata,” for your new release.

- In PeopleSoft PeopleTools 8.50, Microsoft SQL Server customers need to use a non-system administrator access ID. If you are upgrading from PeopleSoft PeopleTools 8.49 or earlier, enable and configure the access ID after completing the final pass of the upgrade.

See Enterprise PeopleTools Installation for Microsoft SQL Server, appendix “Synchronizing the ACCESSID User,” for your new release.

- Review your PeopleSoft Portal settings, as the values may have changed during the upgrade.

See Enterprise PeopleTools PeopleBook: PeopleTools Portal Technology, appendix “Understanding Changes in Portal Configuration Settings.”

Properties

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

Task 6-6: Enabling Oracle Transparent Data Encryption

PeopleSoft Change Assistant will display this step only if you are upgrading from PeopleSoft PeopleTools 8.50 or later. Oracle’s Transparent Data Encryption (TDE) feature was disabled at the beginning of the upgrade. If you had TDE enabled prior to the upgrade, then after finishing the final Move to Production pass of the upgrade, you need to re-enable TDE by running scripts in the sequence specified in the following procedure.

To re-enable TDE:

1. Run *PS_HOME*\scripts\postupgtdeprocess1.sql.

The script *postupgtdeprocess1.sql* performs similarly to the script *preupgtdeprocess.sql*, which you ran at the beginning of the upgrade, to find any tables that are encrypted, generate a list of fields that need to have the PeopleSoft metadata encryption attribute re-enabled, and create the ENCRYPTEDTBLSA project. The ENCRYPTEDTBLSB project is compared with the ENCRYPTEDTBLSA project, and the resulting list of differences between the recfields is input to the script *postupgtdeprocess2.sql*.

See “Applying PeopleTools Changes,” Performing Updates to PeopleTools System Tables, Saving Transparent Data Encryption Information.

2. Run *PS_HOME*\scripts\postupgtdeprocess2.sql.

The script *postupgtdeprocess2.sql* generates four scripts, which you will run in the next step to reapply TDE to the records identified by the *postupgtdeprocess1.sql*. Review the generated scripts (particularly *PSTDEREBUILDFUNCIDX.SQL*) to make sure that the syntax, sizing, and tablespace information is intact and is not split at the end of a line. If necessary, modify the scripts as needed for your environment.

3. Run the scripts that were generated when you ran *postupgtdeprocess2.sql* in the following order:
 - *PSTDEDROPFUNCIDX.SQL*
 - *PSTDEREENCRYPT.SQL*
 - *PSTDEREBUILDFUNCIDX.SQL*

- PSTDEREENCRYPTMETADATA.SQL

4. Run *PS_HOME*\scripts\postupgtdevalidation.sql.

The script *postupgtdevalidation.sql* validates that all tables and columns that were encrypted before the upgrade have maintained encryption. It lists any records that contain encrypted fields but were not included in the ENCRYPTEDTBLSB project. It also sets the value for the TDE algorithm defined within PSOPTIONS.

See Enterprise PeopleTools PeopleBook: Data Management, Administering PeopleSoft Databases on Oracle, “Implementing Oracle Transparent Data Encryption” for your new release.

Properties

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

Task 6-7: Defining Source System IDs

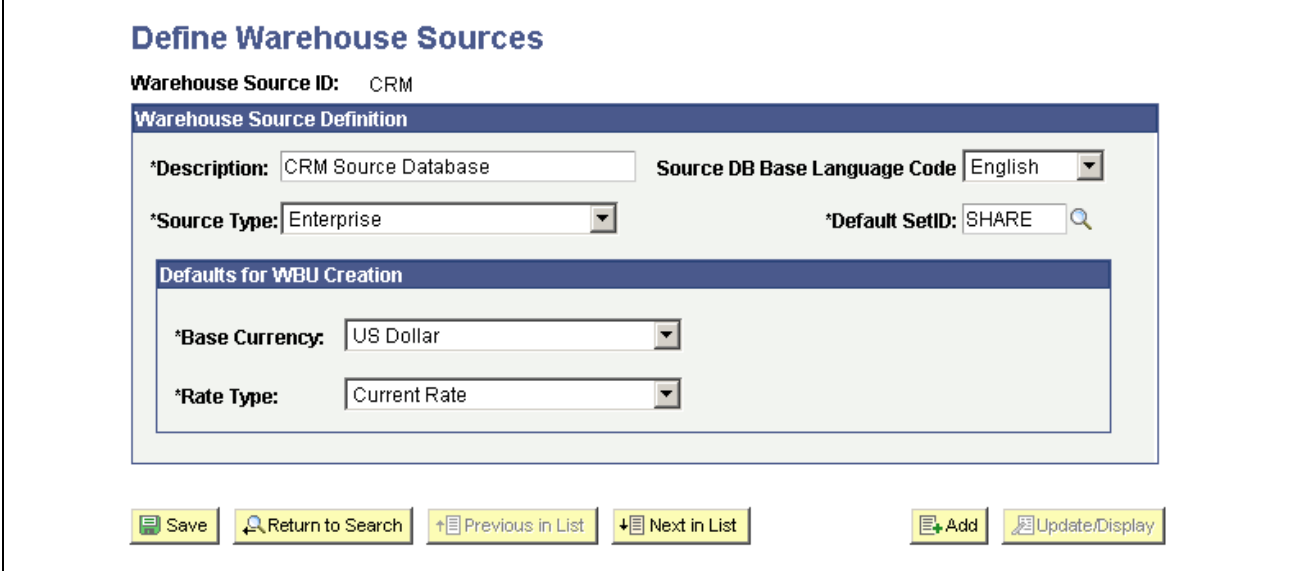
In the new release, PeopleSoft Enterprise Warehouse tags its data with the ID of the source transaction database. This tag is called the source system ID. For each source system ID that you have identified previously in the upgrade, you will define its complete definition in this task.

See “Preparing Your Database for Upgrade,” Defining Defaults for the OWE Upgrade.

To define source system IDs:

1. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Define Warehouse Sources.
2. Select the Add Warehouse Source tab to add a new source system ID.
3. Set the Warehouse Source ID to your source system ID.

The Define Warehouse Sources page appears, as shown in the following example:



Define Warehouse Sources

Warehouse Source ID: CRM

Warehouse Source Definition

*Description: CRM Source Database Source DB Base Language Code: English

*Source Type: Enterprise *Default SetID: SHARE

Defaults for WBU Creation

*Base Currency: US Dollar

*Rate Type: Current Rate

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

Define Warehouse Source dialog box

4. Set the description to the source system ID's description.
5. Set the source type as follows:
 - Set it to *Enterprise* if the source database is another PeopleSoft EPM database.
 - Set it to *EnterpriseOne* if the source database is an EnterpriseOne database.
 - Set it to *Other* if the source database is an Enterprise transaction database or a non-PeopleSoft application database.
6. Set the source base language code, default SetID, base currency, and rate type to those of the source database.

More information on setting up and defining these parameters can be found in the PeopleSoft EPM PeopleBooks.

See the PeopleSoft EPM Foundation for Analytical Application and Performance Management Warehouse PeopleBook for your new release, "Setting Up EPM Foundation."

7. Save the source system ID definition.
8. If you have more source system IDs to define, select the Add button and repeat steps 3 through 7.

See the PeopleSoft Enterprise Performance Management Warehouse PeopleBook for your new release.

Properties

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

Task 6-8: Refreshing User Defined Ledger Template

Many delivered ledger records have changes in ChartFields. For user-defined ledger templates—that is, ledger templates that were not delivered by Oracle for PeopleSoft, and were created based on these ledger records—you must manually refresh the ChartFields.

To refresh ChartFields for user-defined ledger templates:

1. Select EPM Foundation, EPM Setup, Ledger Setup, Ledgers, Ledger Template.
2. Click Search.
3. Select a ledger template that fits the criteria described above.
4. On the ChartFields page, write down or take a screen shot of the existing settings.
5. Then, click the refresh button in the right corner.

The page will be populated with the ChartFields according to the new record definition.

6. You can make changes to the edit fields if necessary.
7. Save your changes when you are finished.

Properties

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

Task 6-9: Reviewing Application Message Settings

The upgrade may have inactivated some of your application messages. You will need to reactivate any that may have been in use. You can refer to the compare results from the task titled, Running New Release Compare Reports, to determine which messages should be reactivated.

See "Running and Reviewing Compare Reports," Running New Release Compare Reports.

To activate an application message:

1. Open Application Designer for your Copy of Production database.
2. Open the message you want to activate.
3. Access the message properties (either choose File, Definition Properties or click the Properties icon on the task bar).
4. Click the Use tab.
5. Select the Active option.
6. Click OK.
7. Save the message.

Properties

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

Task 6-10: Upgrading Project Request Milestones

This task only applies to Project Portfolio Management 8.81 and above. If you are using Project Portfolio Management 8.80, skip this task.

With the new design of project request milestones in the current release of PeopleSoft Project Portfolio Management, any existing project request milestones in PeopleSoft EPM 8.8x need to be entered manually. Refer to the following sections for details about how to add a milestone to a project request.

See the PeopleSoft Enterprise Project Portfolio Management PeopleBook for your new release, “Establishing Project Requests,” information on assigning milestones.

See the PeopleSoft Enterprise Project Portfolio Management PeopleBook for your new release, “Setting Up Project Portfolio Management,” information on understanding and defining milestones.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Project Portfolio Management	All	All

Task 6-11: Activating Security Groups

For the Oracle’s PeopleSoft Enterprise Planning and Budgeting application, the security setup associated with the Planning Model/Phase in earlier releases has been upgraded to a security group in the current release. The upgraded security groups have been initially set to an inactive status.

To activate security groups:

1. Select Planning and Budgeting, System Administration, Administer User Security, Security Groups.
2. Review and set the required security groups to an active status.

More information on security groups is available in a PeopleBook.

See the PeopleSoft Enterprise Planning and Budgeting PeopleBook for your new release, “Setting Up Security and Roles.”

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Both	Planning and Budgeting	All	All

Task 6-12: Upgrading Consolidation Processes

In the new PeopleSoft release, there are changes to the content of the process definition table for PeopleSoft Global Consolidations (GC):

- The process ID, CLOSED, has been renamed to LOCKED. If the process CLOSED is being used in your consolidation process, you may need to modify the information for that process. This table gives the information associated with the old and new processes:

Process ID	Display Order	Description	Function	Consolidation Phase
CLOSED	100	Period closed	Consolidation closed	Consolidation
LOCKED	100	Locked period	Consolidation locked	Consolidation

- The following table lists six new processes added in the demo database environment, including the information associated with each process:

Process ID	Display Order	Description	Function	Consolidation Phase
LEDVERFY	15	Source ledger verification	Source ledger verification	Ledger Preparation
HARMONIZE	46	Harmonization entries	Manual	Ledger Enrichment
FXADJ	50	Translation adjustments	Translation adjustments	Ledger Enrichment
FLSRC	55	Source flows validated	Source flows	Ledger Enrichment
CLOSEPRC	110	Close process	Close process	Consolidation
FLJRNL	120	Journal flows validated	Journal flows	Consolidation

If you find any of these processes are critical in your consolidation process, you must manually add them into the system. In addition, if any of these processes conflict with your existing definition in terms of display order or process ID, please make the changes necessary. Finally, if you entered your definitions in a non-base language, please make sure these new changes are also entered in the non-base language.

Use the following three figures to assist you in determining the relevance of these new processes in your consolidation process. These are examples of the Name, Display Controls, and Parameters tabs of the Consolidation Processes page, and illustrate the six new processes described above in the context of all the consolidation processes delivered in the demo database:

Consolidation Processes

SetID: SHARE

Process Definition					
Name Display Controls Parameters 					
*Display Order	*Process ID	*Description	*Function	*Consolidation Phase	
10	LEDLOADED	Source Ledger received	Source Ledger Load	Ledger Preparation	+ -
15	LEDVERIFY	Source Ledger Verification	Source Ledger Verification	Ledger Preparation	+ -
20	CALENDAR	mapped to common calendar	Calendar Mapping	Ledger Preparation	+ -
30	LEDGERFLDS	mapped to common COA	Account Mapping	Ledger Preparation	+ -
40	CURRENCY	mapped to consol currency	Currency Translation	Ledger Preparation	+ -
45	CLEDBUILT	Consolidation Ledger loaded	Consolidation Ledger Created	Ledger Preparation	+ -
46	HARMONIZE	Harmonization Entries	Manual	Ledger Enrichment	+ -
50	FXADJ	Translation Adjustments	Translation Adjustment	Ledger Enrichment	+ -
55	FLSRC	Source Flows Validated	Source Flows	Ledger Enrichment	+ -
70	EQTZ	Equitization	Equitization	Consolidation	+ -
80	ELIM	Elimination	Elimination	Consolidation	+ -
90	NCI	Non Controlling Interest	Non-Controlling Interest	Consolidation	+ -
100	LOCKED	Locked Period	Consolidation Locked	Consolidation	+ -
110	CLOSEPRC	Close Process	Close Process	Consolidation	+ -
120	FLJRNL	Journal Flows Validated	Journal Flows	Consolidation	+ -

[Global Consolidation Center](#)

* Required Field

Consolidation Processes page: Name tab

Consolidation Processes

SetID: SHARE

Process Definition					
Name Display Controls Parameters 					
*Display Order	*Process ID	Display On	*Display Title		
10	LEDLOADED	Ledger Preparation Manager	Data Received	+ -	
15	LEDVERIFY	Ledger Preparation Manager	Source Verification	+ -	
20	CALENDAR	Ledger Preparation Manager	Calendar Mapping	+ -	
30	LEDGERFLDS	Ledger Preparation Manager	Account Mapping	+ -	
40	CURRENCY	Ledger Preparation Manager	Currency Translation	+ -	
45	CLEDBUILT	Ledger Preparation Manager	Ledger Loaded	+ -	
46	HARMONIZE	Ledger Preparation Manager	Harmonization Entries	+ -	
50	FXADJ	Ledger Preparation Manager	Translation Adjustment	+ -	
55	FLSRC	Ledger Preparation Manager	Source Flows	+ -	
70	EQTZ	Consolidation Manager	Equitization	+ -	
80	ELIM	Consolidation Manager	Elimination	+ -	
90	NCI	Consolidation Manager	Non-Controlling	+ -	
100	LOCKED	Consolidation Manager	Period Locked	+ -	
110	CLOSEPRC	Consolidation Manager	Close Process	+ -	
120	FLJRNL	Consolidation Manager	Journal Flows	+ -	

[Global Consolidation Center](#)

* Required Field

Consolidation Processes page: Display Controls tab

Consolidation Processes

SetID: SHARE

Process Definition Customize | Find | First 1-15 of 15 Last

Name | Display Controls | Parameters

*Display Order	*Process ID	*Status Update Method	Process Order	Process Name	Reconciliation Job ID		
10	LEDLOADED	None	10				
15	LEDVERIFY	Application Engine Batch	15	GC_LEDVERIFY			
20	CALENDAR	Application Engine Batch	20	GC_PREP	GCRECNCAL		
30	LEDGERFLDS	Application Engine Batch	30	GC_PREP_MAP	GCRECNCLE		
40	CURRENCY	Application Engine Batch	40	GC_PREP_CURR	GCRECNCUR		
45	CLEDBUILT	Application Engine Batch	50	GC_PREP_CLED			
46	HARMONIZE	Manual Processing	44				
50	FXADJ	Application Engine Batch	55	GC_FX_MGR			
55	FLSRC	Application Engine Batch	42	GC_FLSRC_ENG			
70	EQTZ	Application Engine Batch	60	GC_EQTZ_MGR	GCRECNEQT		
80	ELIM	Application Engine Batch	60	GC_ICUELIMS	GCRECNELIM		
90	NCI	Application Engine Batch	60	GC_NCI_ELIM	GCRECNNCI		
100	LOCKED	Locking Processing	100				
110	CLOSEPRC	Application Engine Batch	110	GC_CLOSE_MGR			
120	FLJRNL	Application Engine Batch	120	GC_FLJRN_ENG			

[Global Consolidation Center](#)

* Required Field

Consolidation Processes page: Parameters tab

Properties

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

Task 6-13: Upgrading Workforce Analytics

This section discusses:

- Reloading the Analytic Calculation Engine Model
- Integrating with Position Budgeting Data
- Populating the Employee Total Field

Task 6-13-1: Reloading the Analytic Calculation Engine Model

To analyze or alter the compensation planning scenario results in Oracle's Siebel Workforce Analytics, the Analytic Calculation Engine (ACE) model needs to be reloaded even if a Business Analytic Modeler (BAM) model has been previously loaded.

To reload the ACE model, select Workforce Analytics, Compensation Strategy, Setup Compensation Scenario, Load Analytic Model.

Properties

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

Task 6-13-2: Integrating with Position Budgeting Data

If the Oracle's Siebel Workforce Analytics compensation strategy approval process is run to export the compensation planning scenario results to the position budgeting application, then you will want to integrate Oracle's Siebel Workforce Analytics data with position budgeting data.

To complete this integration:

1. Select Workforce Analytics, Compensation Strategy, Setup Compensation Scenario.
2. Select the Variable Rule page.
3. Select the earning code.
4. Select the Other Pay Rule page.
5. Select the benefit plan type.

Properties

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

Task 6-13-3: Populating the Employee Total Field

A new field, Employee Total, has been added to the review market scenario Fit to Market page and Gap to Target page. To populate this new field, you will need to rerun the market compensation engine, WA_MBP.

To populate the Employee Total field, select Workforce Analytics, Market Compensation, Process, Run Market Scenario.

Properties

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

Task 6-14: Synchronizing Metadata

This section discusses:

- Synchronizing Record Suites for Non DB2

- Synchronizing Record Suites for DB2
- Running the Mass Compile
- Reloading Data Mapper Rule Set Columns
- Running Application Security Processing
- Exporting KPI Calculation Definitions
- Deleting Obsolete Objects
- Importing KPI Calculation Definitions
- Recompiling Application Rules
- Importing KPI Calculation Data
- Fixing KPI Calculation Definitions
- Running KPI Manager Rules Compile
- Running the Metadata Audit
- Reviewing the Metadata Audit Results

In this task, you will run the metadata mass compile and metadata audit, review the metadata audit results and error detail, and recompile application rules.

Task 6-14-1: Synchronizing Record Suites for Non DB2

This PeopleSoft Data Mover script synchronizes the Record Suites metadata with your existing data. If you have additional Record Suites, this script populates the necessary table with that information. The script name for your upgrade path is:

UPVFX06.DMS

Note. This script is for non-DB2 databases only.

Properties

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

Task 6-14-2: Synchronizing Record Suites for DB2

This PeopleSoft Data Mover script synchronizes the Record Suites metadata with your existing data. If you have additional Record Suites, this script populates the necessary table with that information. The script name for your upgrade path is:

UPVFX06DB2.DMS

Note. This script is for DB2 z/OS and DB2 UDB for Linux, UNIX, and Windows (DB2 UNIX/NT) databases only.

Properties

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

Task 6-14-3: Running the Mass Compile

In this step you run the mass compile.

To run the mass compile, first sign on to your target database from your browser:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes, Add New Run Control ID.
2. Enter a Run Control ID, and click Add.

The following example shows the Compile Metadata Changes page that appears.

Compile Metadata Changes

User ID: VP1 [Report Manager](#) [Process Monitor](#) [Run](#)

Run Control ID: sd

Mass Compile Information

Program Name: PF_COMPILE When: Once ☐ Only Imported Metadata ☒

*Description: SetID: PATHNAME:

Metadata Type

☒ Record ☒ TableMap ☒ DataMap ☒ Expression
☒ Record Summary ☒ Constraint ☒ DataSet ☒ Rule ☒ Filter

Performance Mgmt Warehouse

☒ Data Manager Rules ☒ Allocation Manager Rule ☒ Technical Scenarios

Activity-Based Management

☒ ABM Implicit Pointers ☒ ABM Transaction Pointers

Scorecard

☒ Data Element ☒ Calculation Definition ☒ Calculation Rule
☒ KPI Dimensions ☒ Scorecard Definition

Workforce Analytics

☒ DataSet

Compile Metadata Changes page

3. In the When field, select *ALWAYS*.
4. Enter a Description.

5. Select the Clear All option, the right-most check box in the upper right corner. (The page is currently shown with the Select All option selected.)
This will clear all of the check boxes on the page.
6. In the Metadata Type group box, select all of the check boxes.
7. Click Save.
8. Click Run.
9. On the Process Scheduler Request page, select your process scheduler from the Server Name drop-down list.
10. Click OK to run the process (it will run for several hours).

Use Process Monitor to check the success of the process (PF_COMPILE).

Important! If you get errors in the mass compile, you must fix them and rerun the mass compile before proceeding with the upgrade.

To resolve any errors in the Data Manager or Allocation Manager rules, please compile the underlying data maps and then compile the rules. Refer to your PeopleBooks for more information.

See PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up and Working with EPM Foundation Metadata,” Setting Up Datamaps.

See Appendix: “Fixing Compilation Errors.”

Properties

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

Task 6-14-4: Reloading Data Mapper Rule Set Columns

Many target data maps used by the data mapper rule sets have changes in field definitions. You will need to reload the grid that is used to populate rule set columns on the data mapper rule set page. This includes any data mapper rule set that uses the GCMLEDMGT delivered target data map or data maps that are based on the same record or subrecord.

To reload data mapper rule sets:

1. Select EPM Foundation, Data Enrichment Tools, Data Mapper, Rule Set.
2. Click Search.
3. Select a map rule set that fits the criteria described previously.
4. On the Data Mapper Rule Set page, first take a screen shot.
5. Click the Reload Definition button, which is located above the Rule Set Columns grid.

The grid will be populated with the new field definitions.

6. You can now perform the field mapping.
7. Save the page.

Properties

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

Task 6-14-5: Running Application Security Processing

In this step you run the application engine for security processing. The security rules that were upgraded during the Data Conversion step will be used to generate data for the security join tables.

Before running application security processing, you must create your customized dimension metadata and verify that the security rules are correctly migrated.

To complete application security processing:

1. Select EPM Foundation, Foundation Metadata, Metadata Creation and Editing, Define Dimension.
2. Now you have to create your custom object types.

You identified these custom object types earlier in the upgrade during the task Identifying Custom Object Types.

See "Preparing Your Database for Upgrade," Identifying Custom Object Types.

See PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook, "Setting Up and Working with EPM Foundation Metadata," Defining and Setting Up Dimensions.

All your old customized object types need to be set up as OWE Dimensions.

3. Select EPM Foundation, EPM Security, Security By Role, Role Dimension Access.
4. Verify that all your security rules have been migrated correctly.

Security rules are migrated by converting each security group to a security role in the new security setup.

5. If you have any constraint-based security rules, select "Constraint based selection" and reload the constraint; correct any errors you might encounter.

See PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook, "Setting Up and Working with EPM Foundation Metadata," Securing EPM.

6. Select EPM Foundation, EPM Security, Advanced, Request Security Processing, Add New Run Control ID.
7. Enter a Run Control ID, and click Add.

The following example shows the Request Security Processing page.

Request Security Processing

User ID: VP1
[Report Manager](#)
[Process Monitor](#)

Run Control ID: RUN_SECURITY

Process Information

*Description: Run Security Processing
When: Always
☐ Send Email Notification
[Specify Email Parameters](#)

EPM Role:
Dimension:
*As Of Date: 07/21/2006

Enter Business Unit to use for RecordSuite allocation:
*Business Unit: CORP1

☒ Rerun Option

*Jobstream ID: SECURITY

Last Run On:

User ID:
Warehouse:

Copy System Role to EPM

☒ Rebuild Security Only
☐ Copy Roles, Rebuild Security
☐ Copy Roles Only

Program: PF_JOBSTREAM
As Of Date:

Request Security Processing page

8. In the When field, select *Always*.
9. Enter a description.
10. Enter the business unit to use for RecordSuite allocation.
11. Select the Rerun option.
12. In the Jobstream ID field, enter SECURITY.
13. Click Save.
14. Click Run.
15. On the Process Scheduler Request panel, click OK to run the process. (It will run for a long time.)
16. Use Process Monitor to check the success of the process (PF_JOBSTREAM).

Properties

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

Task 6-14-6: Exporting KPI Calculation Definitions

In this step, you export rows from the Key Performance Indicator (KPI) Calculation Definition and Calculation Fields tables. The first section of this Data Mover script exports all rows from KPI Calculation Definitions and Calculation Fields and creates data file UVBCX01_FULL.DAT. The second section exports only the earliest effective dated rows from the KPI Calculation Definition and Calculation Fields tables and creates data file UVBCX01_PART.DAT.

The script name for your upgrade path is:

```
UVBCX01.DMS
```

Properties

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

Task 6-14-7: Deleting Obsolete Objects

This is an optional step. SQL objects containing KPI expression information will become orphans or obsolete after this process. If you choose to perform this step and remove the obsolete SQL objects, then this step must be done now. The script will delete rows from the following tables:

- PSSQLDEFN
- PSSQLDESCR
- PSSQLTEXTDEFN
- PSSQLLANG

Run the PeopleSoft Data Mover script UVBCX02.DMS.

Properties

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

Task 6-14-8: Importing KPI Calculation Definitions

In this step, you will import KPI Calculation Definitions. This data will be used in the KPI Manager mass compile process to create KPI expressions.

The first section of this PeopleSoft Data Mover script imports only the earliest effective dated rows from the KPI Calculation Definition and Calculation Fields tables. Its input data file is UVBCX01_PART.DAT. The second section imports non-expression KPOPERANDS rows into the PF_DATAMAP_DEFN and PF_DATAMAP_COL tables. Its input data file is UVBCX03_KPDM.DAT. This is PeopleSoft delivered system data taken from the PeopleSoft EPM Demo database. In addition, all KPI expressions are deleted from the metadata tables.

The script name for your upgrade path is:

UVBCX03.DMS

Properties

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

Task 6-14-9: Recompiling Application Rules

In this step, you recompile each Rule/Element in each application to look for Rule/Element errors. This will ensure that the Rules and SQL Object IDs assignments you had before the upgrade are still valid. You will recompile the following rules and elements for products that you have licensed:

- Enterprise Warehouse Data Manager Rules
- Security Groups
- Workforce Analytics DataSets
- Financial Analytics Stratification Rules
- Scorecard Data Element
- Scorecard Calculation Definition
- Scorecard Calculation Rule
- Scorecard KPI Dimensions
- Scorecard Definition
- Activity Based Management Implicit Pointers
- Activity Based Management Transaction Pointers

To recompile application rules:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes.
2. Click Add New Run Control ID.
3. Enter a new run control ID value and click Add.
The Compile Metadata Changes page is displayed.
4. In the When field, select *ALWAYS*.
5. Enter a description.
6. In the Metadata Type group box, clear all of the check boxes.
7. In the other group boxes, select the check boxes for all other items that are applicable to your system.
8. Click Save.
9. Click Run.
10. On the Process Scheduler Request panel, click OK to run the process. (It will run a few hours.)

Use Process Monitor to check the success of the process (PF_COMPILE).

Important! If you get errors in the application rules compile, you must fix them and rerun the mass compile before proceeding with the upgrade.

See Appendix: “Fixing Compilation Errors.”

11. Select Financial Services Industries, Product Portfolio, Stratification to open the Stratification Rules page.
12. Recompile the Financial Analytics stratification rules.

See Also

PeopleSoft Enterprise Application Fundamentals for Financial Services Industry PeopleBook, "Setting Up and Performing Stratification"

Properties

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

Task 6-14-10: Importing KPI Calculation Data

In this step, you will run a PeopleSoft Data Mover script that imports all rows into the KPI Calculation Definition and Calculation Fields tables. The script uses input data file UVBCX01_FULL.DAT.

The script name for your upgrade path is:

UVBCX04.DMS

Properties

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

Task 6-14-11: Fixing KPI Calculation Definitions

For the KPI Manager Rules Mass Compile pass only, KPI Calculation Definitions with multiple effective dates must be resaved in the KPI Calculation Definition page to prevent the mass compile process from terminating with an abend.

To identify and fix multiple effective dated rows:

1. On your Copy of Production database, from the main menu, select Reporting Tools, Query, Query Viewer.
2. Run the following query and save the results:

UPG_KPCALC_01

3. From the PeopleSoft menu, select Key Performance Indicators, Administration, Building Blocks, Calculations.
4. For every row returned by the query, do the following:
 - a. Enter the setID and Caculation ID values returned by the query into the search record.
 - b. Select the Correct History check box.
 - c. Click Search.
The Calculation page will be displayed.
 - d. Note the Rounding value; change it to force a save.
 - e. Click Save.
 - f. Change the Rounding value back to its original value.

g. Click Save again.

Properties

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

Task 6-14-12: Running KPI Manager Rules Compile

In this step, you run the mass compile again. This pass of the mass compile will compile all of the KPI calculation definitions and calculation rules.

To run the KPI manager rules compile:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes.
2. Click Add New Run Control ID.
3. Enter a new run control ID value and click Add.

The Compile Metadata Changes page is displayed.

4. Enter a description for the mass compile into the Description field, for example “*KPI Calculations and Rules.*”
5. In the When drop-down list box, select *Always*.
6. Select the Clear All option, the right-most check box in the upper right corner.
This will clear all of the check boxes on the page.
7. Select the Calculation Definition and Calculation Rule check boxes in the Scorecard section.
8. Click Save.
9. Click Run.
10. On the Process Scheduler Request page, click OK to run the process. (It will run for several hours.)
11. Make a note of the process instance number.

Use Process Monitor to check the success of the process (PF_COMPILE).

Important! If this pass terminates with an abend, you must fix all errors and rerun the process. For this pass only, informational errors can be ignored, as long as the process terminates normally.

See Appendix: “Fixing Compilation Errors.”

Properties

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

Task 6-14-13: Running the Metadata Audit

In this step, you run the metadata audit to look for metadata errors.

To run the metadata audit:

1. Select EPM Foundation, Foundation Metadata, Other Metadata Operations, Audit EPM Objects, Add New Run Control ID.
2. Enter a Run Control ID, and click Add.
3. In the When field, select *ALWAYS*.
4. In the Performance Mgmt Warehouse group box, select *Metadata*.
5. Click Save.
6. Click Run.
7. On the Process Scheduler Request panel, click OK to run the process.

Use Process Monitor to check the success of the process (PF_EPM_AUDIT).

Important! If you get errors in the metadata audit, you must fix them and rerun the mass compile before proceeding with the upgrade.

See Appendix: “Fixing Compilation Errors.”

Properties

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

Task 6-14-14: Reviewing the Metadata Audit Results

In this step, you review the metadata audit results and make any required repairs.

To review the metadata audit results:

1. Select EPM Foundation, Job Processing, Review Jobstream Content, Engine Messages.
2. Select the Process Instance of the Metadata Audit run.
3. Click the Message Detail tab.
4. Click the Search icon to populate the details.
5. Scroll through the detail error messages.

You can ignore error message numbers 110, 130, and 140. These error messages are caused by products that are not installed. You will need to fix all other error messages before proceeding.

6. Repeat the metadata audit process until only the acceptable errors remain.

Properties

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

Task 6-15: Upgrading Legacy Business Unit Mappings

This section discusses:

- Understanding Legacy Business Unit Mappings
- Backing Up Business Unit Tables
- Running Dimension Mapper ETL Jobs
- Defining Warehouse Sources
- Generating Source Lineage
- Enabling Query Security
- Confirming All Inputs Are Present
- Completing the Mapping Process

Understanding Legacy Business Unit Mappings

If you are upgrading your warehouse to the latest PeopleSoft release, you probably want to recreate your previous business unit mappings in order to maintain consistency with historical data. A set of tools collectively called Dimension Mapper will help you complete this process aided by several PS/Query objects and the application engine.

This task focuses on the steps required for upgrading business unit mappings. Refer to the PeopleSoft EPM PeopleBooks for additional information on running Dimension Mapper.

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, information on setting up warehouse business units.

Task 6-15-1: Backing Up Business Unit Tables

Before you begin, make sure you have backup copies of the following tables:

- BUS_UNIT_TBL_PF
- BUS_UNIT_TBL_FS
- SETID_TBL
- SET_CNTRL_TBL
- SET_CNTRL_GROUP
- SET_CNTRL_REC

The database backup that you made after completing data conversion previously should have included these tables. If for some reason you need to redo the business unit upgrade process described in this task, you can restore these tables and start over.

Task 6-15-2: Running Dimension Mapper ETL Jobs

First you need to run the ETL jobs that populate the input tables required by Dimension Mapper.

To run the Dimension Mapper ETL jobs:

1. Set up the ETL maps.

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for the new release, information on loading data into PeopleSoft EPM Foundation.

2. For each source that you are bringing into the warehouse, make a record of the source system ID for use in the next step.

See Defining Warehouse Sources.

Properties

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

Task 6-15-3: Defining Warehouse Sources

You need to define a warehouse source for each source system ID that you created in the previous step.

To define warehouse sources:

1. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Define Warehouse Sources.
2. Select the Add Warehouse Source tab.
3. Enter a source system ID.

For each source system, you must enter the corresponding source system ID that you defined in the previous step, Running Dimension Mapper ETL Jobs. For example, if you defined two source system IDs called FSCM1 and HCM1, then you will need to use these exact strings in the Source System Identification field in the Define Warehouse Sources page.

4. Select a default SetID.

For each warehouse source, you will need to define a default SetID. The default SetID is not used in the upgrade process. But if you later create new business units in a source system and import them into the warehouse, the Business Unit Wizard will use the default SetID. Therefore, chose a default SetID for each source system that you would use when creating business units in the respective system. If the system in question is not a PeopleSoft system, then choose a default SetID that will help you identify data from that system if you need to later trace data back to the source.

5. Set the other defaults for warehouse business unit (WBU) creation.

There are several other parameters requested in the warehouse source definition, including a default currency and a default rate type. As with default SetID, these defaults are not used in the upgrade process but would be used later if you run the Business Unit Wizard.

Properties

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

Task 6-15-4: Generating Source Lineage

Source lineage identifies the connection between source and target tables. This information is used by Dimension Mapper to validate your mapping configuration. To generate source lineage, you must associate the appropriate source blueprint with each source system.

To generate the source lineage:

1. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, View Source Blueprint.
2. Review the source blueprints to ensure that the blueprints for your sources are present. Blueprints for all supported systems ship as system data.

Note. The PeopleSoft FSCM blueprint includes lineage information for PeopleSoft ESA, PeopleSoft SCM, and PeopleSoft Financials. A blueprint for PeopleSoft EnterpriseOne (E1) is also provided. PeopleSoft Enterprise Learning Management (ELM) is not SetID based, so you can use the NONSETID blueprint for PeopleSoft ELM sources. You should also use the NONSETID blueprint for third-party systems that are not SetID based.

3. If you have modified your system by adding new SetID-based tables to your PeopleSoft pillar and you brought these tables into dimensions in PeopleSoft EPM, then you may need to update the generic blueprint for that system.

Customizations have no impact on the blueprints as long as they do not impact the key structure of source or target tables. For example, adding new columns to an existing source table or warehouse dimension will have no impact on a blueprint.

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, information on setting up warehouse business units.

4. Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Warehouse Lineage.
5. Associate the correct blueprint to each of your sources.
6. Click the Save button.

Properties

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

Task 6-15-5: Enabling Query Security

You must enable query security in order to run PS/Query objects in the following step.

See Confirming All Inputs Are Present.

To enable the query security:

1. From the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter *QUERY_TREE_EW* in the Tree Name field.
3. Click the Search button.
4. Click the *QUERY_TREE_EW* link from the grid.

5. Click the Insert Child Group icon.
6. Enter *DM_UPGRADE_GROUP* in the Access Group field.
7. Click the Add button.
8. Enter “Dimension Mapper Upgrade Group” in the Description field.
9. Click OK.
10. Click the *DM_UPGRADE_GROUP* - Dimension Mapper Upgrade Group link.
11. Click the Insert Child record icon.
12. On the Add Child Record page, enter *PF_SRC_LINEAGE* in the Record (Table) Name field.
13. Click the Add button.
14. Repeat steps 11-13 for the following records:
 - *PF_SRC_SETCNTRL*
 - *BUS_UNIT_SRC_PF*
 - *PF_SRC_BU_NAMES*
 - *PF_SRC_BU_ROLES*
15. Click the Save button.

Properties

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

Task 6-15-6: Confirming All Inputs Are Present

At this point, all of the information that you need to complete the mapping process should be present. You should check the tables before proceeding by running the following PS/Query objects.

To confirm that all necessary information is present:

1. Run the *UPG_EW_DM_SRC_LINEAGE* PS/Query object.
 You should see lineage rows for each of your sources. If rows are not present, see the previous step.
 See Generating Source Lineage.
2. Run the *UPG_EW_DM_SRC_BU_NAMES* PS/Query object.
 You should see all of the business units that you expect from each source. If the business units are not present, see the previous step Running Dimension Mapper ETL Jobs.
3. Run the *UPG_EW_DM_SRC_BU_ROLES* PS/Query object.
 You should see role data for your source business units. A role is a business unit type such as AP, GL, INV, and so on. If role data is not present, see the previous step Running Dimension Mapper ETL Jobs previously.
4. Run the *UPG_EW_DM_SRC_SETCNTRL* PS/Query object.

You should see one row for each of your defined sources with the number of rows in SRC_SETCNTRL for each source. If rows are not present for one or more sources, see the previous step Running Dimension Mapper ETL Jobs. For each PeopleSoft pillar, you should expect the number of rows to be approximately equal to the following formula:

$$((\# \text{ Business Units}) + (\# \text{ SetIDs in the Pillar})) \times (\# \text{ SetID-Based Tables in the Pillar})$$

The following table gives the number of SetID-based tables for PeopleSoft pillars:

PeopleSoft Pillar	SetID-based Tables
CRM 8.9	1,350 tables
FSCM	4,173 tables
HCM 8.9	784 tables

- Run the UPG_EW_DM_BAD_SETCNTRL PS/Query object.

Occasionally, there could be corrupt data in the source pillar if someone entered data directly into the database instead of using the PeopleSoft EPM application. This query identifies any business unit names that are greater than five chars, that are null, or that contain only a dash. These values must be removed or the following validation step may fail.

Properties

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

Task 6-15-7: Completing the Mapping Process

In this step, you will complete the legacy business unit mapping process.

To migrate your legacy business unit mappings to the new mapping table:

- Run the application engine program UPG_EF_8903 with the upgrade user ID from the command line as follows:

```
$PS_HOME\bin\client\winx86\psae -CD dbname -CT dbtype -CS dbservername -CO oprid⇒
-CP oprpswd -R UPG_EF_8903 -AI UPG_EF_8903
```

- Select EPM Foundation, EPM Setup, Warehouse Sources & Bus. Units, Business Unit Mapping.

You should see each of your source business units mapped to an appropriate WBU. However, the application engine program will not map legacy business units that had a one-to-many mapping.

- In the unlikely event that you have business units that had a one-to-many mapping, you will have to map them manually. Use the following query to identify business units this type:

```
UPG_EW_DM_BU_SPLITTING
```

This query identifies the multiple WBUs that each source business unit mapped to in the past. You must select one of these WBUs for each source business unit to use going forward.

4. SetIDs are not be mapped by the application engine program. For each SetID, select the appropriate SetID in the warehouse.

An exact match should be present, unless you had previously remapped source SetIDs using a Data Loader lookup table. If this is the case, you must determine and recreate the historical mapping relationships that existed in your previous system.

5. Validate the new mapping by clicking the Validate button.

The system will check the mapping configuration.

6. When the grid appears, select *Conflict* from the list box.

The grid should become empty. If conflicts are detected, then a one-to-many mapping is present between a source SetID and two or more warehouse SetIDs on the same warehouse record. This situation must be corrected.

7. If there are conflicts:

- a. Identify which business units are conflicting and where (which records).
- b. Modify the warehouse SetID assignments to remove the conflicts.
- c. Return to the Business Unit Mapping page and repeat the validation process until no conflicts are present.

Properties

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

Task 6-16: Upgrading GC Journal Publish Mapper Rules

For the PeopleSoft Global Consolidations (GC) application, the journal publish rule is modified to use PeopleSoft Enterprise Warehouse data mapper rule group to perform ChartField mappings. For journal publish rules that were used by the consolidation models based on ledger template GCCLEDMGT, the system will associate a data mapper rule group DFLTJPUBG1 with the PeopleSoft General Ledger Account Entry field if it was selected; it will associate a data mapper rule group DFLTJPUBG2 with the PeopleSoft Global Consolidations Accounting Entry field if it was selected. The DFLTJPUBG1 rule group contains one data mapper rule set, DFLTJPUBR1. The DFLTJPUBG2 rule group contains one data mapper rule set, DFLTJPUBR2.

In this task, you will manually migrate the mapping of PeopleSoft Global Consolidations Affiliate and Ledger fields from the query results compiled in a previous task to the data mapper rule.

See “Preparing Your Database for Upgrade,” Running GC Journal Publish Rule Query.

To upgrade the PeopleSoft Global Consolidations journal publish mapper rules:

1. Select EPM Foundation, Data Enrichment Tools, Data Mapper, Rule Set.
2. Select the data mapper rule set DFLTJPUBR1 (default General Ledger account entry map) under setID SHARE in the Correction History mode.
3. Select the Data Mapper Rule Set tab.

4. In the Rule Set Columns region, specify the value for target column Ledger based on the query results from the previously run query.
5. Change the map method to *Use Source* for target column Affiliate.
6. Select the source column to map based on the query results from the previously run query.
7. Click Compile.
8. Save the changes.
9. Select the data mapper rule set DFLTJPUBR2 (default GC account entry map) under setID SHARE in the Correction History mode.
10. Select the Data Mapper Rule Set tab.
11. In the Rule Set Columns region, specify the value for target column Ledger based on the query results from the previously run query.
12. Click Compile.
13. Save the changes.

Note. For a setID that is not SHARE, you should create a data mapper rule set and rule group similar to delivered rule sets and rule groups DFLTJPUBG1, DFLTJPUBG2, DFLTJPUBR1, and DFLTJPUBR2. Then follow the preceding steps.

Properties

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

Task 6-17: Fixing Scorecard User Security

This section discusses:

- Enabling Scorecard User Query
- Identifying Scorecard User Security Values

In the new release, scorecards were changed so that they no longer need security entries in the PeopleSoft Enterprise Warehouse Security objects.

In this task, you will first enable the PeopleSoft Scorecard user query. Then, you will run that query to generate a list of all your current PeopleSoft Scorecard user security values. The PeopleSoft Scorecard user security values returned by this query should be analyzed. If it is determined that any of the users returned by the query need access to the scorecards, then you will need to grant those users PeopleSoft Scorecard access using the new PeopleSoft Enterprise Warehouse Security objects.

Note. This task applies only to customers using PeopleSoft Scorecard products.

Task 6-17-1: Enabling Scorecard User Query

To enable the PeopleSoft Scorecard user query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter *QUERY_TREE_BSC* in the Tree Name field.
3. Click the Search button.
4. Click the *QUERY_TREE_BSC* link from the grid.
5. Click the *BSC_ACCESS_GROUP – BSC_ACCESS_GROUP* link.
6. If you do not see record *UPG_BC_SECURITY* under the *BSC_ACCESS_GROUP*, then click the Insert Child record icon next to *BSC_ACCESS_GROUP – BSC_ACCESS_GROUP*.
7. On the Add Child Record page, enter *UPG_BC_SECURITY* in the Record (Table) Name field.
8. Click the Add button.
9. If you do not see record *BC_BSC_DFN* under the *BSC_ACCESS_GROUP*, then click the Insert Child record icon next to *BSC_ACCESS_GROUP – BSC_ACCESS_GROUP*.
10. On the Add Child Record page, enter *BC_BSC_DFN* in the Record (Table) Name field.
11. Click the Add button.
12. If you do not see record *BC_BSC_PLIST* under the *BSC_ACCESS_GROUP*, then click the Insert Child record icon next to *BSC_ACCESS_GROUP – BSC_ACCESS_GROUP*.
13. On the Add Child Record page, enter *BC_BSC_PLIST* in the Record (Table) Name field.
14. Click the Add button.
15. Click the Save link above the tree.

Properties

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

Task 6-17-2: Identifying Scorecard User Security Values

To identify PeopleSoft Scorecard user security values:

1. On your target database, from the PeopleSoft menu, select Reporting Tools, Query, Query Viewer.
2. Run the following query:

```
UPG_BC_SECURITY
```

3. Save the query results.

If no rows were returned from the query, all of the PeopleSoft Scorecard user security values were successfully converted in the Scorecard Definition tables; skip the rest of this task. If rows were returned, then refer to the following PeopleBooks to grant user security to the scorecard dimension.

See the PeopleSoft Enterprise Scorecard PeopleBook for your new release, “Defining Your Strategy and Establishing Scorecards.”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Securing EPM,” Securing Dimensions and Metrics.

Properties

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

Task 6-18: Fixing Scorecard User Defaults

This section discusses:

- Enabling Scorecard User Defaults Query
- Identifying Scorecard User Default Values

In the new release, scorecards were changed so that they no longer need security entries in the PeopleSoft Enterprise Warehouse Security objects. Instead, all scorecards have been converted to personal scorecards. As a result of these changes, some data in the My Profile page under the Scorecard menu was not upgraded.

In this task, you will run a query that will provide you with a list of all your current scorecard user default values. The scorecard user defaults returned by this query should be analyzed. If it is determined that any of the users returned by the query need to have correct default scorecard data set up, then you will need to select a scorecard in the My Profile page.

Note. This task applies only to customers using PeopleSoft Scorecard products.

Task 6-18-1: Enabling Scorecard User Defaults Query

To enable the PeopleSoft Scorecard user defaults query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter QUERY_TREE_BSC in the Tree Name field.
3. Click the Search button.
4. Click the QUERY_TREE_BSC link from the grid.
5. Click the BSC_ACCESS_GROUP – BSC_ACCESS_GROUP link.
6. If you do not see record BC_OPR_DEFAULTS under the BSC_ACCESS_GROUP, then click the Insert Child record icon next to BSC_ACCESS_GROUP – BSC_ACCESS_GROUP.
7. On the Add Child Record page, enter BC_OPR_DEFAULTS in the Record (Table) Name field.
8. Click the Add button.

- Click the Save link above the tree.

Properties

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

Task 6-18-2: Identifying Scorecard User Default Values

To identify scorecard user default values:

- On your target database, from the PeopleSoft menu, select Reporting Tools, Query, Query Viewer.
- Run the following query:

```
UPG_BC_USER_DEFAULTS
```

- Save the query results.

If no rows were returned from the query, all of the Scorecard user default values were successfully converted in the Scorecard User Defaults table; skip the rest of this task. If rows were returned, then fix the data as described in the following step.

If rows were returned, then refer to the Scorecard PeopleBook to assign the proper scorecard to each user returned by the query.

See the PeopleSoft Enterprise Scorecard PeopleBook for your new release, “Monitoring Scorecards and KPIs,” Establishing Profiles and Portal Preferences.

Properties

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

Task 6-19: Fixing KPI Assessment Images

This section discusses:

- Enabling the KPI Assessment Image Query
- Identifying KPI Assessment Definitions

In the new release, some delivered image objects were changed or removed from PeopleSoft PeopleTools tables. Some of the changed or deleted image objects may be referenced in the KP_ASSESS_DFN table.

In this task, you run a query that will provide you with a list of all your KPI assessments that reference images which are no longer valid. The assessment definitions returned by this query must be fixed.

Task 6-19-1: Enabling the KPI Assessment Image Query

To enable the KPI assessment image query:

1. On your Copy of Production database, from the PeopleSoft menu, select PeopleTools, Security, Query Security, Query Access Manager.
2. Enter *QUERY_TREE_KPI* in the Tree Name field.
3. Click the Search button.
4. Click the *QUERY_TREE_KPI* link from the grid.
5. Click the *KPI_ACCESS_GROUP – KPI_ACCESS_GROUP* link.
6. If you do not see record *KP_ASSESS_DFN* under the *KPI_ACCESS_GROUP*, then click the Insert Child record icon next to *KPI_ACCESS_GROUP – KPI_ACCESS_GROUP*.
7. On the Add Child Record page, enter *KP_ASSESS_DFN* in the Record (Table) Name field.
8. Click the Add button.
9. Click the Save link above the tree.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All Scorecard Products Workforce Rewards	All	All

Task 6-19-2: Identifying KPI Assessment Definitions

To identify KPI assessment definitions:

1. On your target database, from the PeopleSoft menu, select Reporting Tools, Query, Query Viewer.
2. Run the following query:

```
UPG_KPI_ASSESS_IMG
```

3. Save the query results.

If no rows were returned from the query, all of the assessment image values were successfully converted in the KPI Assessment Definition table; skip the rest of this task.

4. From the PeopleSoft menu, select Key Performance Indicators, Administration, Building Blocks, Assessments to navigate to the Assessment Definition page.
5. For every row returned by the query, do the following steps:
 - a. Enter the setID and Assessment ID values returned by the query into the search record.
 - b. Select the Correct History check box.
 - c. Click Search.
The Assessment Definition page will be displayed.
 - d. Select an image ID from the prompt table.

e. Click Save.

Properties

Database Orientation	Initial or MTP	Products	Platforms	Languages
Target	Initial	All Scorecard Products Workforce Rewards	All	All

Task 6-20: Updating KPI Descriptions

In the new PeopleSoft release, Key Performance Indicator (KPI) dimension member description values are being stored in the new KP_KPI_DSCR_F00 fact table to improve performance when viewing the KPI pages.

In this task, Application Engine program UPG_KP_02 will load the values in the new KP_KPI_DSCR_F00 fact table for all the data that already exists in the KP_KPI_CALC_F00 fact table.

Properties

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

Task 6-21: Installing the EPM Charting Tool

This task is required for all PeopleSoft EPM products that use AVS charts. If you have not done so already, install the PeopleSoft EPM charting tool.

See the PeopleSoft Enterprise Performance Management Installation Guide for your new release, “Installing the PeopleSoft EPM Charting Tool (AVS).”

Properties

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

Task 6-22: Preparing the Content Provider Registry

You should perform this task if you use PeopleSoft Enterprise Portal 8.4 or later running on PeopleSoft PeopleTools 8.50 or higher with full or partial navigation load access method. This means that you do not use a single link to access your content provider databases, but instead, you load some or all of the portal registry structures from the content provider database into your PeopleSoft Enterprise Portal database. Oracle refers to content provider databases as the application databases that contain the transaction content. Your Copy of Production database is your content provider database for this task.

When you upgrade a content provider database, the registry structures are updated, old registry structures are removed, and new registry structures are added. These changes need to be copied to the PeopleSoft Enterprise Portal database by updating the portal registry structures in your PeopleSoft Enterprise Portal database to match what is in the content provider database. Follow the detailed instructions in the appendix referenced below.

See Appendix: “Upgrading the Content Provider Registry.”

Properties

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

Task 6-23: Updating the Portal Options Data

In this step you update the PeopleSoft PeopleTools Portal Options data.

Note. Only perform this step if your upgraded database is on PeopleSoft PeopleTools 8.46 or greater.

This step sets the portal options prefix and Owner ID. These values are used when creating Pagelet Wizard definitions and Navigation Collection objects.

To set the Portal Options Prefix and Owner ID:

1. From your browser, sign in to your New Copy of Production database.
2. Select PeopleTools, Portal, Portal Utilities, System Options.
3. Update the value for the Registry Object Prefix with a 1- to 4-character prefix that is unique to your organization.

Note. Do *not* use PAPP, PAPX, PAPQ, PAPI, PRTL, EO, or PT. Do *not* use any product line specific prefix (such as CR, HC, EP, or CI). Do *not* use a blank value.

4. Enter the Owner ID value with your organization’s specific owner ID.

Note. The Owner ID is a translate value on the PeopleSoft PeopleTools field OBJECTOWNERID. Do *not* use any delivered product Owner ID. If you do not have an Owner ID, then either create one, or leave the Owner ID value as a blank space.

5. Click Save.

Properties

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

Task 6-24: Stamping the Database

In this step, you set the database to the release level of the Demo database. The values that you enter here appear whenever you view the Help, About PeopleTools dialog.

To stamp the database:

1. Launch PeopleSoft Application Designer on your Copy of Production database using the new PeopleSoft release.
2. Select Tools, Upgrade, Stamp Database.
3. Fill in all three of the PeopleSoft Release fields with the appropriate value for your product line and release number:

EPM 9.10.00

4. In the Service Pack field, enter the service pack number to which you are upgrading. For example, if you are upgrading to SP2, enter the number 2. If you are upgrading to a release that is not at a service pack level, enter 0.
5. Click Stamp.
6. Close PeopleSoft Application Designer.

Properties

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

Task 6-25: Reviewing Change Control

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

To turn on Change Control:

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

The following example shows the options available on the Change Control Administrator dialog box:



Change Control Administrator dialog box

- Set “Use change control locking” and “Use change control history” according to your site specifications.

Note. Move to Production: The Change Control feature slows down copy functions. The large copy projects are only executed during the initial pass, and the feature is only disabled during the initial pass. If you enable the feature at this point, it will remain enabled during future test Move to Production passes.

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

Properties

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

Task 6-26: Backing Up Before Testing

Back up your Copy of Production 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 6-27: Testing Your Copy of Production

In this task, you test your Copy of Production. Testing your Copy of Production 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 7

Applying Changes to the Production Database

This chapter discusses:

- Understanding the Move to Production
- Testing the Move to Production
- Testing Once More
- Performing the Move to Production

Understanding the Move to Production

Once you complete all of the necessary tasks to launch your system into production, you are ready to begin your Test Move to Production passes or to move your system into production.

Task 7-1: Testing the Move to Production

This section discusses:

- Understanding the Test Move to Production Passes
- Understanding the Test Move to Production Steps
- Creating a New Change Assistant Job

Understanding the Test Move to Production Passes

Everything you have done to this point is the initial pass of the upgrade process. Now you are ready to start the Test Move to Production pass. The initial pass is very time consuming and requires a lot of analysis at different steps of the process to troubleshoot issues. The Test Move to Production pass is a different series of steps, which includes a subset of the previous tasks, and takes advantage of the tasks performed during the first upgrade pass.

You should perform as many test moves to production as necessary to work out any issues and to be comfortable with the process. During each Test Move to Production you will be able to refine the process so that you can save time and avoid manual processes. These test passes will also let you know how long the process takes so you can plan your production downtime for your move to production weekend.

Task 7-1-1: Understanding the Test Move to Production Steps

The following text is a high level view of what you will be doing in the Move to Production test pass. The remaining steps in this task will prepare your test environment. For example, you may need to move some scripts generated in the initial pass to a new PeopleSoft Change Assistant staging directory. Next you will create a new PeopleSoft Change Assistant job, setting the Type of Upgrade to Move to Production. That will give you a job with steps filtered with only those steps that apply to the Move to Production (MTP) test pass. From that point forward, you will simply follow the steps as they exist in your new job.

One of those first steps will be to take a Copy of Production. This second Copy of Production is 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 New Copy of Production is now the Target database.

The steps executed in the MTP pass vary in several ways. Many of the tasks and steps in the initial test pass will be replaced in the MTP pass with PeopleSoft Data Mover export and import scripts. In the initial pass, some steps required you to make functional decisions and take time to manually set up data. That data can be copied from the first database to the next, saving you setup time and eliminating the chance for manual error or typos.

Also, the MTP pass does not repeat the database compare/copy steps. You made the decisions once; there is no need to repeat these steps. Instead, a PeopleSoft Data Mover script, MVPRDEXP, will export all of the tables that contain the PeopleSoft PeopleTools objects like records and PeopleCode from the first database. Another PeopleSoft Data Mover script, MVPRDIMP, will import those tables into the second database. Anything you have done to PeopleSoft PeopleTools objects while executing or testing the first pass—copied objects from the Demo database, reapplied customizations, applied updates from the My Oracle Support website—will be moved to the second Copy of Production with these scripts.

Another important difference with the MTP pass is the handling of SQL scripts that create and alter tables. In the initial pass, you generated the SQL scripts, sometimes edited the SQL script, and then executed the SQL scripts. In the MTP pass, you may be able to skip the generation steps and use the SQL you previously generated. This is another way to save time in your critical go-live window and is the ultimate goal, but it is an incremental process to get to that point.

In the first MTP pass, everyone must regenerate the SQL. There are small differences between the initial and MTP passes that require the SQL to be regenerated in at least one MTP pass. The PeopleSoft Change Assistant templates are delivered with the steps set this way.

In subsequent MTP passes, you may choose to “turn off” the generation steps if possible. If you have not changed any records at the end of one MTP pass, then you can reuse the SQL in your next pass. If you have done anything to change records, you should generate SQL again. This can include changes such as applying PeopleSoft PeopleTools upgrades (for example, 8.47 to 8.48), or applying updates from the My Oracle Support website that involve record changes, or making additional customizations to records.

If you choose to skip some of these steps, do one of the following: mark the step complete in your job, or change the step properties in the template, so that the step will never show up in your MTP filtered job again. To change the step properties, double-click on the step to open the Step Properties dialog, and change the Type of Upgrade to Initial Upgrade. In addition, copy the SQL scripts from the previous pass output directory to the new pass output directory. PeopleSoft Change Assistant will look for the SQL scripts in the output directory set on the job’s Database Configuration, so make sure it will find them when it tries to run them.

The steps that are eligible for this treatment will contain Move To Production documentation notes indicating such.

Note. If you have made any changes to your trees, tree structures, or PS/Query objects since the upgrade began, you may want information on how to preserve those changes.

See Appendix: “Preserving Queries and Tree Objects.”

Properties

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

Task 7-1-2: Creating a New Change Assistant Job

You need to create a new PeopleSoft Change Assistant job for each test Move to Production pass.

To create a new PeopleSoft Change Assistant job:

1. Oracle recommends that you use new output and stage directories for each new test pass. Create those directories now.
2. From PeopleSoft Change Assistant, select Tools, Options and specify the new output and staging directories on the Change Assistant Options page.
3. Select File, Open Environment and select the environment.
4. Review the configuration in the General Settings dialog box.

The Database Type, Language and SQL Query Executable will be the same as your previous job. Make changes to the *PS_HOME* settings, if necessary, and select Next.

5. Specify the Source Database setup information and click Next.

This is the Copy of Production database from your previous pass.

6. Specify the Target Database setup information and click Next.

This is the new Copy of Production database.

7. Review the environment configuration on the Confirm Selections dialog box, and click Next to save the changes to the environment.
8. Select File, New Job.
9. In the Use Template dialog box, select the template and click OK.
10. In the Type of Upgrade dialog box, select Move to Production.
11. Click OK.

A new upgrade job is created, using the naming convention “*Template_Environment_Move to Production.*”

12. Highlight the job name and select Edit, Set Documentation Directory, then select the directory where the documentation is located and click OK.

If you have been using documentation printed from the filtered view on the jobs, print the documentation again. The steps for Move to Production are different than in the initial pass.

13. Select View, Documentation.
14. Select View, Expand All to display all the steps in the job that apply to your upgrade.

The job will contain steps that were not in the initial upgrade pass and will exclude some steps that were in the initial upgrade pass, based on the step properties.

Now you are ready to run the job.

Properties

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

Task 7-2: Testing Once More

As in any implementation project, you must consider planning, resources, development, and training. Testing also needs to be an integral part of your implementation project. Testing your database once more, after you have completed the upgrade, ensures that you can still operate your day-to-day processes on your new PeopleSoft release.

The level of testing in this task will focus primarily on the strategies to employ before moving into production.

Properties

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

Task 7-3: Performing the Move to Production

When you are ready, you can move the system into production. Take your system out of production and perform all of the steps involved in testing the Move to Production against your production database.

See Testing the Move to Production.

Properties

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

CHAPTER 8

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

Changing the User Interface

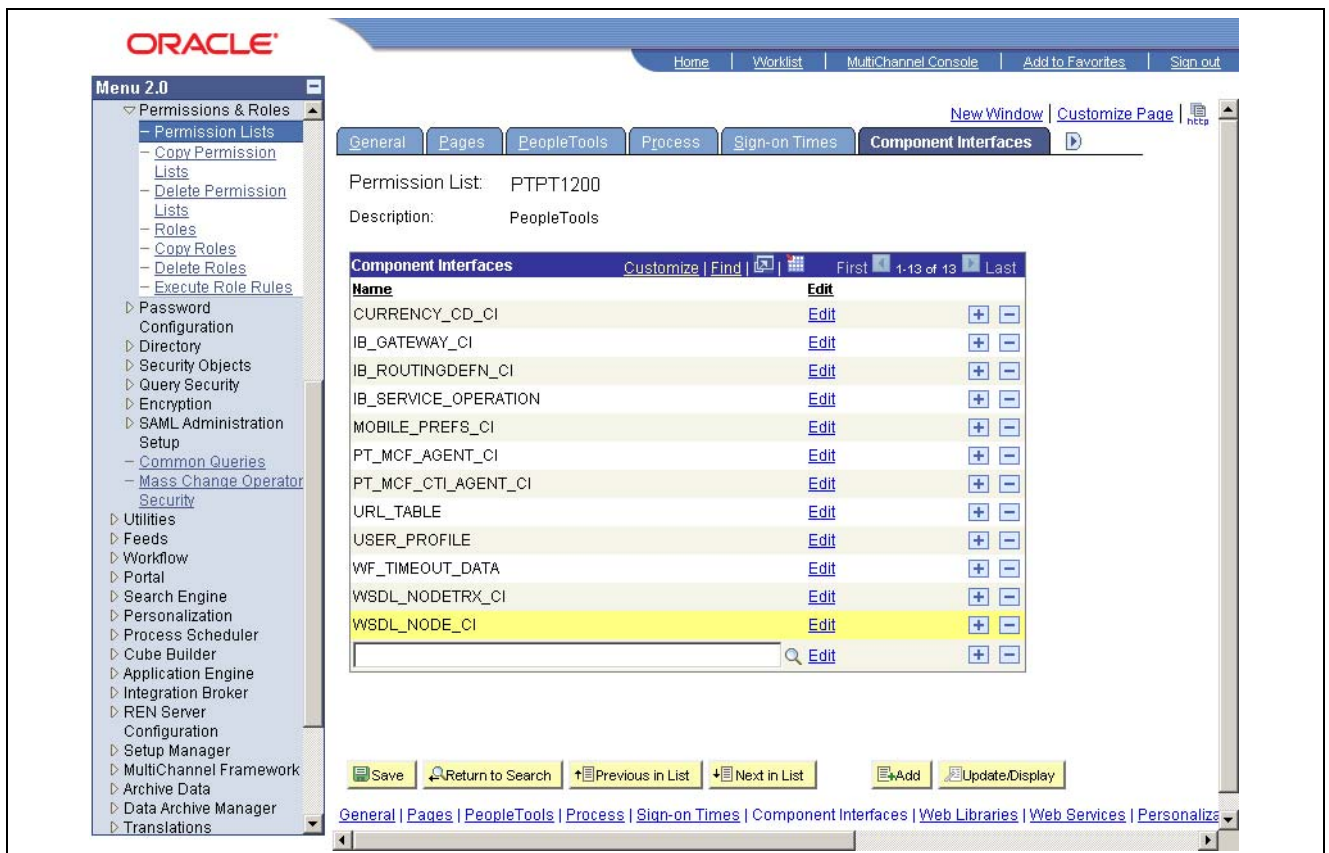
This appendix discusses:

- Changing the User Interface Style

Task B-1: Changing the User Interface Style

Three user interface options were delivered with your current release of PeopleSoft 8.x. The dark blue style is set as your default style. PeopleSoft 8.4 applications and pre-8.50 PeopleSoft PeopleTools system databases use the classic style, but all other applications use the new dark blue style. The classic and light blue styles are considered deprecated as of PeopleSoft PeopleTools 8.50. The following are examples of the three delivered styles: classic, light blue, and dark blue.

The following example represents the classic style.



The classic style user interface option

The following example represents the light blue style.

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Menu 2.0

- Permissions & Roles
 - Permission Lists
 - Copy Permission Lists
 - Delete Permission Lists
 - Roles
 - Copy Roles
 - Delete Roles
 - Execute Role Rules
- Password Configuration
- Directory
- Security Objects
- Query Security
- Encryption
- SAML Administration
- Setup
 - Common Queries
 - Mass Change Operator
 - Security
- Utilities
- Feeds
- Workflow
- Portal
- Search Engine
- Personalization
- Process Scheduler
- Cube Builder
- Application Engine
- Integration Broker
- REN Server
- Configuration
- Setup Manager
- MultiChannel Framework
- Archive Data
- Data Archive Manager
- Translations

General | Pages | PeopleTools | Process | Sign-on Times | **Component Interfaces** | New Window | Customize Page | http

Permission List: PTPT1200
Description: PeopleTools

Component Interfaces Customize | Find | First 1-13 of 13 Last

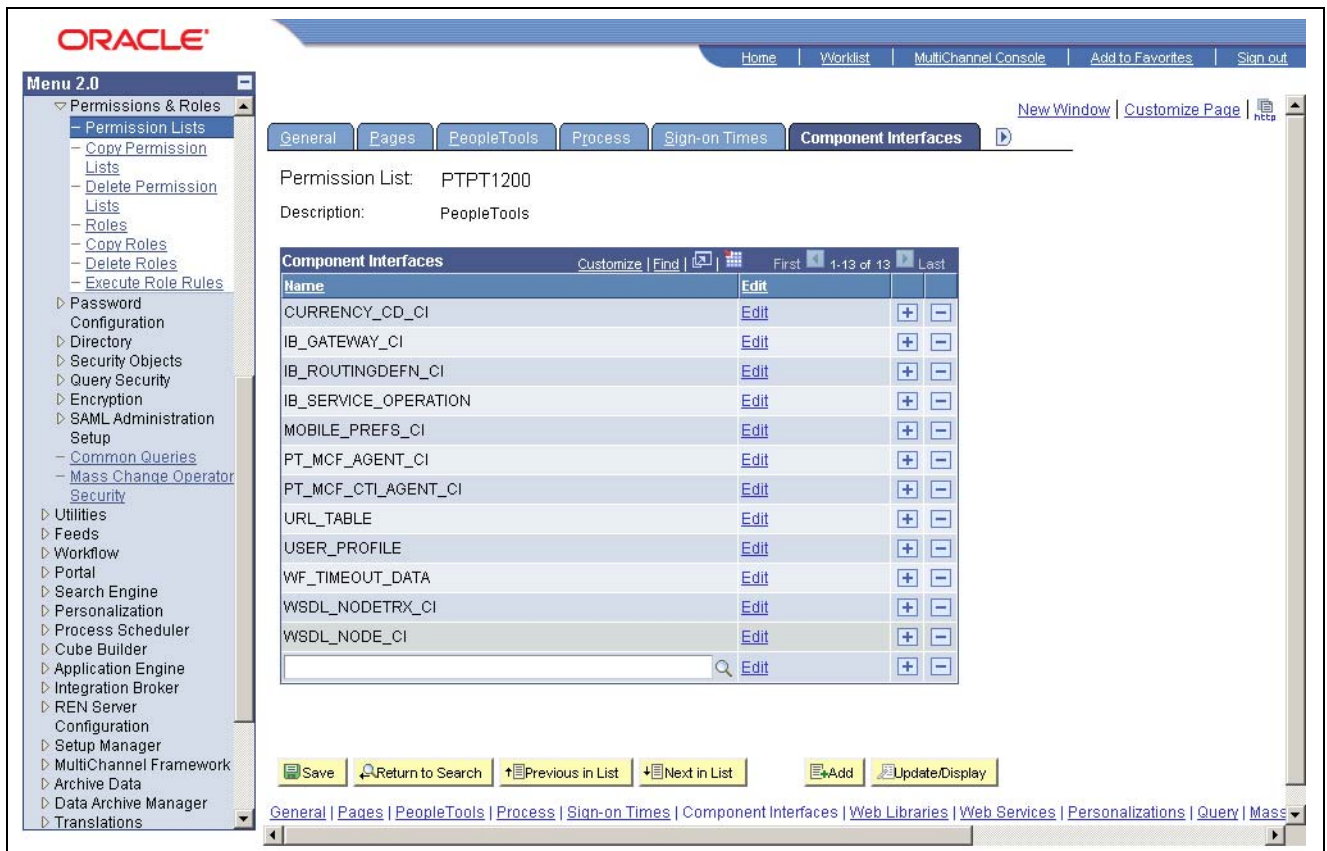
Name	Edit		
CURRENCY_CD_CI	Edit	+	-
IB_GATEWAY_CI	Edit	+	-
IB_ROUTINGDEFN_CI	Edit	+	-
IB_SERVICE_OPERATION	Edit	+	-
MOBILE_PREFS_CI	Edit	+	-
PT_MCF_AGENT_CI	Edit	+	-
PT_MCF_CT_AGENT_CI	Edit	+	-
URL_TABLE	Edit	+	-
USER_PROFILE	Edit	+	-
WF_TIMEOUT_DATA	Edit	+	-
WSDL_NODETRX_CI	Edit	+	-
WSDL_NODE_CI	Edit	+	-

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

General | Pages | PeopleTools | Process | Sign-on Times | Component Interfaces | Web Libraries | Web Services | Personalizations | Query | Mass

The light blue style user interface option

This example represents the dark blue style.



The dark blue style user interface option

See the Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide for your new release.

To change your style, you must delete the sub-stylesheets associated with the dark blue style and replace them with either the classic or light blue sub-stylesheets.

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

To enable a deprecated user interface:

1. In PeopleSoft Application Designer, select File, Open.
2. In the Open Definition dialog box, select Style Sheet from the Definition drop-down list.
3. Enter the name *PSSTYLEDEF* in the Selection Criteria Name field, and select Open.
4. Highlight *PSSTYLEDEF* in the list, and select Open.
5. Click the *PSALTERNATE* sub-stylesheet and press DELETE.
6. Select Insert, Insert Sub Style Sheet.
7. Select *PSALTERNATE_LIGHTBLUE* or *PSALTERNATE*.
8. Repeat steps 5 through 7 for the *PTSTYLEDEF* and *PSACE* sub-stylesheets, making sure to select the same sub-stylesheet that you used in step 7.
9. Select File, Save.

10. Open the stylesheet PSQUERYSTYLEDEF, as you opened a stylesheet in steps 1 through 4.
11. Click the PTQUERYSTYLESUB_DARKBLUE sub-stylesheet and press DELETE.
12. Select Insert, Insert Sub Style Sheet.
13. Select PTQUERYSTYLESUB_LIGHTBLUE or PTQUERYSTYLESUB.
Use the same sub-stylesheet that you used in step 7.
14. Select File, Save.

APPENDIX C

Fixing Compilation Errors

This appendix discusses:

- Understanding Fixing Compilation Errors
- Reviewing Mass Compile and Metadata Audit Errors
- Reviewing Application Rule Compilation Errors

Understanding Fixing Compilation Errors

Review this appendix to familiarize yourself with the various errors that can be encountered during the task “Synchronizing Metadata”, and the appropriate action to take if you encounter these errors.

Task C-1: Reviewing Mass Compile and Metadata Audit Errors

This section discusses:

- Determining the Errors You Must Fix
- Determining the Errors You Can Ignore

You may get errors from the metadata audit. This section will help you determine if these errors can be ignored or if they must be fixed before proceeding with your upgrade.

Task C-1-1: Determining the Errors You Must Fix

The PeopleSoft application upgrade does not upgrade customer metadata built using PeopleSoft-delivered system metadata. If there is an underlying physical table change, Oracle delivers new system metadata for the PeopleSoft upgrade. However, some customer metadata will not be upgraded with the newly defined system metadata.

If a system DataMap was changed because of an underlying physical table change, errors will occur in the mass compile or metadata audit. If you built one of the following metadata objects using PeopleSoft-delivered system DataMaps, these metadata objects need to be refreshed and recompiled if the DataMap was changed from an earlier release:

- Expressions
- Filters

You must fix all mass compile errors, except for the acceptable errors noted in the next section, and rerun the mass compile before proceeding with the upgrade.

Other metadata objects will have mass compile errors, but do not need to be corrected. After the underlying metadata objects are fixed, the subsequent rerun of the mass compile will fix the other metadata object errors.

See PeopleSoft 8.8 Enterprise Warehouse PeopleBook: Setting Up and Using Metadata, “Setting Up and Using Metadata,” Setting Up Filters.

See PeopleSoft 8.8 Enterprise Warehouse PeopleBook: Setting Up and Using Metadata, “Setting Up and Using Metadata,” Setting Up Expressions.

Task C-1-2: Determining the Errors You Can Ignore

Some errors in the metadata audit log files are expected and can be safely ignored. If your errors match the error messages listed below, you do not have to fix them before proceeding to the next step.

Safe MetaData Audit Logfile Errors
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCALMAP PF_FILTER_CODE GCRECNCALMAP
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCALSRC PF_FILTER_CODE GCRECNCALSRC
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCLEDMAP PF_FILTER_CODE GCRECNCLEDMAP
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCWALMAP PF_FILTER_CODE GCRECNCWALMAP
The Constraint built on the Filter has a invalid field. PF_CONSTR_RULE SETID SHARE PF_CONSTRAINT_CODE GCRECNCWALSRC PF_FILTER_CODE GCRECNCWALSRC
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCALMAP ACCOUNTING_PERIOD %AccountingPeriod
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCALSRC BUSINESS_UNIT %GC_LED_BU
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCLEDMAP PF_SCENARIO_ID %ScenarioId
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCWALMAP ACCOUNTING_PERIOD %AccountingPeriod
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCWALSRC PF_SCENARIO_ID %ScenarioId
The Field (Field Name) used in the Filter (Source Name) is invalid. GCRECNCWALSRC BUSINESS_UNIT %GC_LED_BU
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. INV_RECV_LN_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. INV_TRANS_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. ITEM_VOL_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. RECV_SHIP_F00 Fieldname PF_TRANS_DT
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. RTV_DISTRIB_F00 Fieldname PF_TRANS_DT

Safe MetaData Audit Logfile Errors
The above field exists on the Permanent Table (Source Name) but not on the Temp Table. SHIP_DTL_F00 Fieldname PF_TRANS_DT
Reference Keys do not exist. PF_TBLMAP_KY_RF PF_TABLE_MAP_CODE BOREL_BC RECNAME_REF RD_PERSON REF_KEY_FIELD
Reference Keys do not exist. PF_TBLMAP_KY_RF PF_TABLE_MAP_CODE INTERACT RECNAME_REF RD_PERSON REF_KEY_FIELD
Reference Keys do not exist. PF_TBLMAP_KY_RF PF_TABLE_MAP_CODE CUST_RPT RECNAME_REF SET_CNTRL_TBL REF_KEY_FIELD
Datamap built on Invalid TableMap PF_DATAMAP_DEFN DATAMAP_CODE BOREL_BC PF_TABLE_MAP_CODE BOREL_BC DESCR BO_REL,BC,RED_PERSON
Datamap built on Invalid TableMap PF_DATAMAP_DEFN DATAMAP_CODE CUST_RPT PF_TABLE_MAP_CODE CUST_RPT DESCR CUSTOMER_RPT + SET_CNTRL_TBL
Datamap built on Invalid TableMap PF_DATAMAP_DEFN DATAMAP_CODE INTERACT PF_TABLE_MAP_CODE INTERACT DESCR Customer Interaction

Task C-2: Reviewing Application Rule Compilation Errors

Oracle does not upgrade customer application rules built using PeopleSoft-delivered system metadata. If there is an underlying physical table change, Oracle delivers new system application rules for the PeopleSoft upgrade. However, some customer application rules will not be upgraded with the newly defined system metadata.

If a system DataMap was changed because of an underlying physical table change, errors will occur in the mass compile. If you built any of the following application rules using PeopleSoft-delivered system DataMaps, these application rules need to be refreshed and recompiled if the DataMap was changed from an earlier release:

- Data Manager Rules
- Allocation Manager Rules
- Technical Scenarios
- ABM Implicit Pointers
- ABM Transaction Pointers
- KPI Data Elements

You must fix all mass compile errors and rerun the mass compile before proceeding with the upgrade.

Other application rules built on these objects will have mass compile errors, but do not need to be corrected. After the underlying application rules are fixed, the subsequent rerun of the mass compile will fix the other application rule errors.

See the PeopleSoft Enterprise Activity Based Management PeopleBook for your new release, “Setting Up Pointers.”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Using EPM Foundation Data Enhancement Tools.”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, “Setting Up and Enriching Data In the Operational Warehouse - Enriched (OWE).”

See the PeopleSoft Enterprise Performance Management Foundation for Analytical Applications and Performance Management Warehouse PeopleBook for your new release, information on setting up warehouse business units.

See the PeopleSoft Enterprise Scorecard PeopleBook for your new release, “Establishing and Maintaining KPIs.”

APPENDIX D

Preserving Queries and Tree Objects

This appendix discusses:

- Understanding Preserving Queries and Trees
- Preparing the Database
- Creating a New Project
- Comparing the New Project
- Copying the Project
- Testing the Project
- Re-Exporting the PeopleTools Tables

Understanding Preserving Queries and Trees

This appendix contains information for preserving queries, trees, and tree structures. At the beginning of your upgrade, you should have informed your end-users and development team that your PeopleSoft system was frozen, meaning that no changes should have been made to any PeopleSoft PeopleTools tables or objects including queries, trees, and tree structures. The freeze on PeopleSoft PeopleTools changes is important because you will lose any changes to these objects made during an upgrade to PeopleSoft PeopleTools tables. Occasionally, however, end-users may have to make critical changes to trees, tree structures, and PS/Query objects. If this has happened in your system, you can perform a process to preserve those additions and changes to trees, tree structures, and queries. You will have to work with your end-users and developers to obtain a list of queries, trees, and tree structures that you need to preserve.

You will run through the test Move to Production (MTP) steps several times for practice and testing purposes. Please note that you have the option to perform the preserving queries and trees procedure during each of your test Move to Production runs, but you must perform it during the last run of the test Move to Production. If you do not perform this procedure during your last run to preserve the trees, tree structures, and queries that have been changed since the beginning of your upgrade, they will be lost.

Note. The process outlined in this appendix to preserve trees and queries should be performed prior to data conversion so that any additional conversion would be taken care of by the appropriate data conversion programs.

This appendix includes instructions to prepare your database and create a project on which to preserve your queries, trees, and tree structure changes.

Task D-1: Preparing the Database

In this step, you create a new copy of your current production database, perform steps on the new copy, and run scripts against the new copy to update the release level.

To prepare the database:

1. At the beginning of the test Move to Production, you should make a new copy of your current production database. To preserve queries and trees, you need to make not only that Copy of Production but also an additional copy of your current production database. For clarity, Oracle refers to this additional copy of your production database as the Tree/Query Copy of Production database. So now you should have a Copy of Production database and a Tree/Query Copy of Production database.
2. Perform the test Move to Production on your Copy of Production database.
3. To obtain the queries and trees that you want to preserve, the Tree/Query Copy of Production database needs to be at the same release level as the Copy of Production database on which you just completed the test Move to Production. To update your Tree/Query Copy of Production to the same release, you run release scripts against this database. Oracle refers to this as “reling up” the database. Use the Custom Compare template to “rel up” your database. Select the Product Line *PEOPLETOOLS* when configuring your PeopleSoft Change Assistant job.

Task D-2: Creating a New Project

Now that your Tree/Query Copy of Production is at the same release as your Copy of Production database, you create a project in the Tree/Query Copy of Production that contains all of the queries and trees that you wish to preserve.

To create a new project:

1. Sign on to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, New...
3. Select *Project* for Object Type.
4. Select File, Save Project and enter a project name; for example, *PRESERVED*.
5. Select the Upgrade tab in PeopleSoft Application Designer.

Note. Queries and trees do not appear in projects under the Development tab in PeopleSoft Application Designer. To see the queries and trees that you will insert into the *PRESERVED* project in the next step, you must make sure that you are using the Upgrade view of PeopleSoft Application Designer.

6. Select Insert, Definitions into Project...
7. Select Queries from the Definition Type drop-down list box and click Insert.
8. Using your list of identified queries that need to be preserved, highlight each one of those queries from the PeopleSoft Application Designer list.

You can highlight more than one by holding down the Control (CTRL) key while you click the name of the query.

9. After you have highlighted all of the queries that you want to preserve, click Insert, then click Close.
Under the PRESERVED project name in the Upgrade view of PeopleSoft Application Designer, you will see Queries as an object type in the project.
10. Double-click on queries under the PRESERVED project to see a listing of all of the queries to preserve in the right-hand window of PeopleSoft Application Designer.
11. Select File, Save Project.
12. Repeat steps 6 through 11 for trees and tree structures.
Now your PRESERVED project should contain all of the queries, trees, and tree structures that you want to preserve.

Task D-3: Comparing the New Project

In this step, you compare the queries, trees, and tree structures that are in your PRESERVED project against your Copy of Production database. Because the tree objects in your PRESERVED project are not comparable objects in PeopleSoft Application Designer, you must manually compare the tree objects that you want to preserve. During the query and tree structure compare process, the Application Upgrade utility sets the project flags. These flags determine whether the following actions will occur:

- Changes will be performed on the Copy of Production (Target) database when you perform the export and copy.
- Changes will be tagged as *Copy* or *Delete* operations.
- The project flags will be set to automatically take these actions or not.

These settings are determined based on whether or not the objects in the project currently exist on the Copy of Production (Target) database.

To compare the new project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, Open...
3. For Definition, select Project and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Compare and Report.
6. Sign in to your Copy of Production.
7. From the Object Type box, select *Queries and Tree Structures*.
8. Click Options...
9. Select *PeopleSoft Vanilla* for the Target Orientation.
10. Select *Project* for the Compare Type.
11. Verify that the Compare Report output directory is set to the correct location.
12. Select the Report Filter tab and set the report filter check boxes appropriately for your compare.
13. Click OK.

14. Select Compare.
15. Review the compare reports for queries and tree structures. In addition, perform a manual compare of the trees that you want to preserve. Based on the results of this review, set the Action and Upgrade check box appropriately in the PRESERVED project.

Task D-4: Copying the Project

In the following steps, you copy the PRESERVED project to the Target database. This is the Copy of Production database on which you ran the test Move to Production.

To copy the project:

1. Sign in to the Tree/Query Copy of Production using a valid PeopleSoft User ID and launch PeopleSoft Application Designer.
2. Select File, Open...
3. For Definition, select *Project* and click Open to display the list of projects.
4. Select the PRESERVED project and click Open.
5. Select Tools, Upgrade, Copy.
6. Sign in to your Copy of Production database.
7. Make sure that the Reset Done Flags and Copy Project check boxes are selected.
8. Click Select All.
9. Click Copy.
10. Using the Upgrade view of the PRESERVED project in PeopleSoft Application Designer, review the Done flags in the project to make sure that all of the objects that you wanted to preserve were copied to the Target database.

Task D-5: Testing the Project

Now that the queries, trees, and tree structures that you wanted to preserve are in the Copy of Production database, you must test and re-test and make any necessary changes if the test results are not what you expected.

Task D-6: Re-Exporting the PeopleTools Tables

Once you are satisfied with the test results, you must re-export the PeopleSoft PeopleTools tables to actually preserve the queries, trees, and tree structures. During your test Move to Production, you ran MVPRDEXP.DMS to export the PeopleSoft PeopleTools tables. You will use the output files created from running this job as input files during your Move to Production. Because these files were created before copying the queries, trees, and tree structures that you wanted to preserve, the files do not contain the preserved objects, so you must run the MVPRDEXP.DMS script again. Running the MVPRDEXP.DMS script again ensures that you have the most current PeopleSoft PeopleTools tables.

To re-export the PeopleTools tables:

1. As a PeopleSoft user, launch PeopleSoft Data Mover against your Copy of Production database and run the following script:

```
\PS_HOME\SCRIPTS\MVPRDEXP.DMS
```

2. Use the output files created during your final Move to Production.

APPENDIX E

Upgrading the Content Provider Registry

This appendix discusses:

- Understanding Content Provider Registry Upgrade
- Copying Your Portal Solutions Database
- Upgrading PeopleTools for Portal Solutions
- Updating Registry Permission Lists
- Creating the Portal Project
- Comparing the Portal Project
- Reviewing the Portal Project
- Copying the Portal Project
- Copying the Portal Project to Production
- Deleting Obsolete Folders
- Updating Registry Folder Permissions

Understanding Content Provider Registry Upgrade

You should perform this task if you use PeopleSoft Enterprise Portal Solutions 8.4 or later running on PeopleSoft PeopleTools 8.50 or later with the full navigation load access method. This means that you do not use a single link to access your content provider database, but instead load some or all of the portal registry structures from the content provider database into your PeopleSoft Portal Solutions database. Oracle refers to its application databases that contain the transaction content as Content Provider databases. Your Copy of Production database is your Content Provider database for this task.

When you upgrade a content provider database, the registry structures are updated, removed, and added. These changes need to be copied to the PeopleSoft Portal Solutions database. This task will update the portal registry structures in your PeopleSoft Portal Solutions database to match what is in the Content Provider database. This is accomplished by the following:

- Upgrade the PeopleSoft PeopleTools on a copy of the PeopleSoft Portal Solutions database.
This allows a project compare to run between the PeopleSoft Portal Solutions and the Content Provider database.
- Create a portal project in the PeopleSoft Portal Solutions database containing all of the existing Content Provider registry structures.
Copy the portal project (definition only) to the Content Provider database.

- Create a portal project in the Content Provider database containing all of the current Content Provider registry structures, then merge the project definition copied from the PeopleSoft Portal Solutions database into this project.

You will have a complete list of all registry structures for the Content Provider, including what is current and what should be deleted.

- Compare the complete list of registry structures in the Content Provider database to what exists in the PeopleSoft Portal Solutions, using project compare.

This marks the missing registry structures as *delete* and the updated or added registry structures as *copy* in the portal project definition.

- Copy the portal project from the Content Provider database to the PeopleSoft Portal Solutions database.

This deletes, updates, and adds registry structures to the PeopleSoft Portal Solutions database, which syncs it up with what is current in the Content Provider database.

If you use PeopleSoft Portal Solutions 8 SP2, Oracle recommends that you upgrade your PeopleSoft Portal Solutions to the latest available release.

If you do upgrade your PeopleSoft Portal Solutions database, you must be on PeopleSoft PeopleTools 8.46 or later.

Note. If you use PeopleSoft Portal Solutions 8.4 you *do not* need to upgrade to PeopleSoft Portal Solutions 8.8. You can still upgrade to PeopleSoft PeopleTools 8.46 or later.

See Enterprise Portal 8.1x – Managing Information Architecture for additional information on this topic. Go to My Oracle Support and search for Enterprise Portal 8.1x – Managing Information Architecture.

In this appendix, you load your new Portal Registry definitions from your Copy of Production database to a copy of your PeopleSoft Portal Solutions database.

Note. You must complete the tasks in the appendix for each of your separately installed PeopleSoft Portal Solutions databases that correspond to one of the four Portal Registry definitions: EMPLOYEE, CUSTOMER, SUPPLIER, and PARTNER. If your installed PeopleSoft Portal Solutions uses all the registries, then complete this task for each of the portal registries using the same copy of the single PeopleSoft Portal Solutions database.

In the first task of this appendix, you create a copy of your PeopleSoft Portal Solutions database. You use this copy for all subsequent steps for the initial and test Move to Production upgrade passes. For the final Move to Production, do not make a copy. Instead perform the steps on the production PeopleSoft Portal Solutions database.

This document uses the term “target PeopleSoft Portal Solutions database” to refer to the PeopleSoft Portal Solutions database used in the upgrade steps.

Use the following table to determine the correct version of your PeopleSoft Portal Solutions database for each upgrade pass:

Upgrade Pass	Target PeopleSoft Portal Solutions Database
Initial pass	Copy of the PeopleSoft Portal Solutions database
Test Move to Production	Copy of the PeopleSoft Portal Solutions database
Final Move to Production	PeopleSoft Portal Solutions production database

Task E-1: Copying Your Portal Solutions Database

You initially upgrade the Content Provider registry on a copy of your PeopleSoft Portal Solutions database, then test the results of the upgrade. During your test Move to Production, you perform this task against another Copy of the PeopleSoft Portal Solutions.

Create a copy of your current PeopleSoft Portal Solutions production database now. Use this database as your target PeopleSoft Portal Solutions database.

Note. During your final Move to Production, you copy the registry definitions directly to your PeopleSoft Portal Solutions production database. Therefore, you do not need to execute this step during your final Move to Production.

Task E-2: Upgrading PeopleTools for Portal Solutions

During the initial upgrade pass, your PeopleSoft Portal Solutions database must run on the same PeopleSoft PeopleTools release level as your Copy of Production database so that you can do the compare step. Because you do not need to run the compare step during your Move to Production passes, you can skip this task during Move to Production passes.

If the release level of PeopleSoft PeopleTools on your target PeopleSoft Portal Solutions database is not the same as your Copy of Production database release level, upgrade your PeopleSoft PeopleTools now.

Go to My Oracle Support and search for the PeopleSoft PeopleTools upgrade documentation for the new release.

Task E-3: Updating Registry Permission Lists

This section discusses:

- Understanding Registry Permission List Updates
- Updating the Portal Registry
- Deleting the Database Cache

Understanding Registry Permission List Updates

This task applies only to the initial upgrade pass.

Earlier in this upgrade you copied portal registry data from the Demo database to your Copy of Production database. You must update this registry data to include your permission list changes. After updating the portal registry permission lists, delete the database cache.

This process takes between a few minutes and a few hours, depending on the volume of the portal data.

Note. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

Note. You must have a process scheduler started for your Copy of Production database.

Task E-3-1: Updating the Portal Registry

Follow the steps below to update your portal registry permission lists.

To update the portal registry permission lists:

1. On your Copy of Production database, select PeopleTools, Portal, Portal Security Sync.
2. Select the Add a New Value tab.
3. Add a run control as follows:
 - a. Enter a value for the run control ID. The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, SUPPLIER, or PARTNER).
 - b. Click Add.
4. Enter a value for the portal name.

This value must match the portal registry name that you used to replace the *XXXX* in the run control ID.
5. Click Save.
6. Click Run.
7. Set up the process scheduler information and click OK.
8. Click the Process Monitor link to view the progress of the process.

Task E-3-2: Deleting the Database Cache

Follow the steps below to delete the database cache.

To delete the database cache:

1. Delete the Copy of Production database application server cache.
2. Stop and restart the Copy of Production database web server service.

Task E-4: Creating the Portal Project

This section discusses:

- Understanding Portal Project Creation
- Creating the Target Portal Solutions Project
- Cleaning the Target Portal Solutions Project
- Deleting the Target Portal Solutions Database Cache
- Copying the Target Portal Solutions Project Definition
- Creating the Copy of Production Portal Project
- Cleaning the Copy of Production Portal Project

- Deleting the Copy of Production Database Cache

Understanding Portal Project Creation

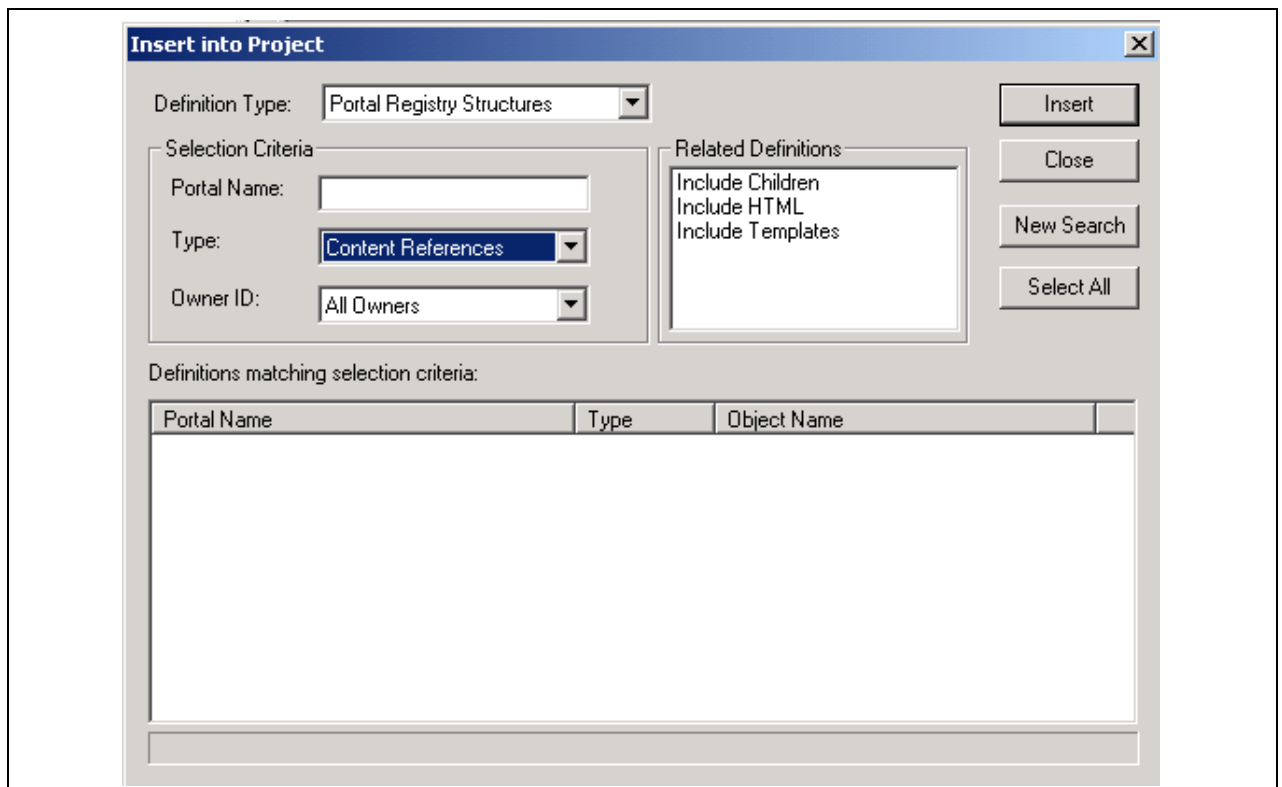
This task applies only to the initial upgrade pass. In this task, you create and modify a project on your target PeopleSoft Portal Solutions database. Then you copy the project definition to the Copy of Production database, where you further modify the project.

Task E-4-1: Creating the Target Portal Solutions Project

Follow the steps below to create the target PeopleSoft Portal Solutions project.

To create the target PeopleSoft Portal Solutions project:

1. Launch PeopleSoft Application Designer and sign in to your target PeopleSoft Portal Solutions database.
2. Select Insert, Definitions into Project...
3. Select the following values on the Insert into Project dialog box, as illustrated by this example:
 - a. In the Definition Type field, select *Portal Registry Structures*.
 - b. Leave the Portal Name field blank.
 - c. In the Owner ID field, select *All Owners*.
 - d. Do not select any values in the Related Definitions field, as shown in the following example:



Insert into Project dialog box

4. Click Insert.
5. Click Select All, and then click Insert again

6. Click Close.
7. From PeopleSoft Application Designer, select File, Save Project As....
8. Enter the project name *PORTAL_PA84X_REGISTRY*.
9. Close PeopleSoft Application Designer.

Task E-4-2: Cleaning the Target Portal Solutions Project

In this step, you clean the target PeopleSoft Portal Solutions Project so that it contains only the existing Content Provider registry structure content references.

To clean the target PeopleSoft Portal Solutions project:

1. In your PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.

Warning! Do not follow the instructions on the Clean Portal Project page. Instead, follow the instructions below.

2. Add the run control ID *CLEAN_PORTAL_XXXXXXXX* where *XXXXXXXX* represents the portal definition name: *EMPLOYEE*, *CUSTOMER*, *SUPPLIER* or *PARTNER* for example.
3. In the Project Name field, enter the project name *PORTAL_PA84X_REGISTRY*.
4. Enter a value in the Portal Name field; *EMPLOYEE* for example.
5. Enter a value in the Content Provider Name field; *CRM* for example.

Note. Before running the Clean Portal Project you must enter the node URI text for the message node that you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task E-4-3: Deleting the Target Portal Solutions Database Cache

In this step, you delete the target PeopleSoft Portal Solutions database cache.

To delete the target PeopleSoft Portal Solutions database cache:

1. On your target PeopleSoft Portal Solutions database, launch Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the target PeopleSoft Portal Solutions database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task E-4-4: Copying the Target Portal Solutions Project Definition

In this step, you copy the target PeopleSoft Portal Solutions project definition to your Copy of Production database.

To copy the target PeopleSoft Portal Solutions project definition:

1. Using PeopleSoft Data Mover, sign in to your target PeopleSoft Portal Solutions database.
2. Run the following PeopleSoft Data Mover script:

```
PS_HOME\SCRIPTS\UVUPX10E.dms
```

3. Close PeopleSoft Data Mover.
4. Using PeopleSoft Data Mover, sign in to the Copy of Production database.
5. Run the following PeopleSoft Data Mover script:

```
PS_HOME\SCRIPTS\UVUPX10I.dms
```

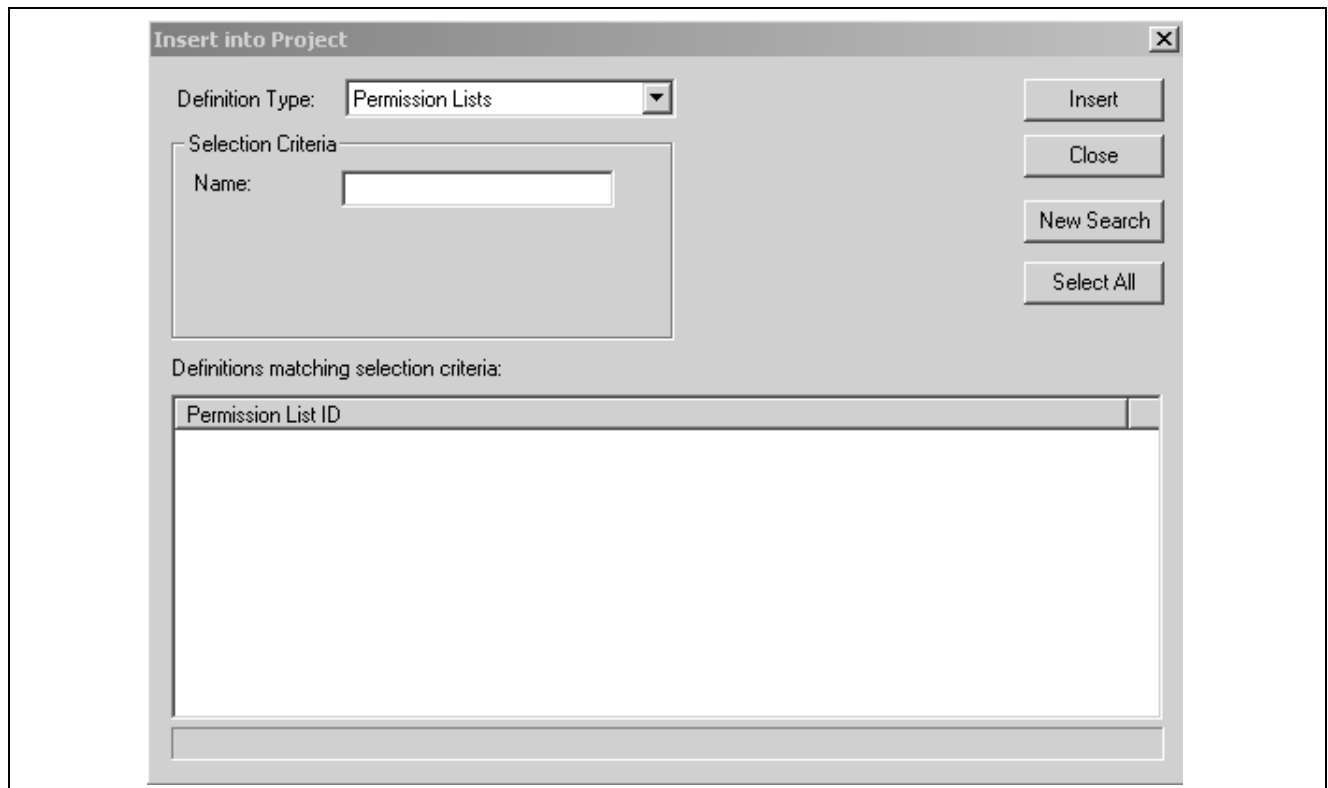
6. Close PeopleSoft Data Mover.

Task E-4-5: Creating the Copy of Production Portal Project

Create a project containing all Portal Registry data on your Copy of Production database.

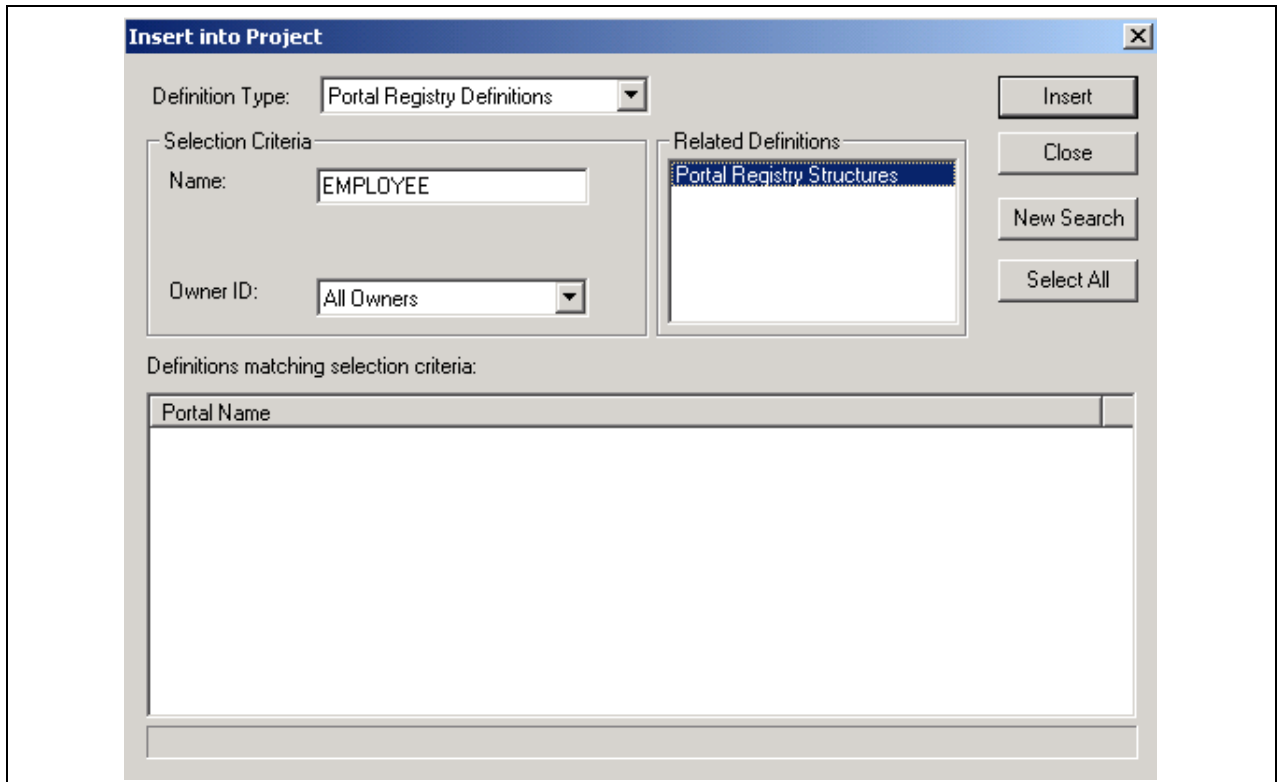
To create the Copy of Production Portal project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Insert, Definitions into Project....
3. In the Definition Type field, select *Permission Lists*, as shown in the following example:



Insert into Project dialog box: Definition Type Permission Lists

4. Click Insert.
5. Click Select All, and then click Insert again.
6. Select the following values, as shown in the example:
 - a. In the Definition Type field, select *Portal Registry Definitions*.
 - b. In the Name field, enter the PeopleSoft Portal Solutions database's default portal name (EMPLOYEE, CUSTOMER, SUPPLIER or PARTNER).
 - c. In the Owner ID field, select *All Owners*.
 - d. In the Related Definitions field, select *Portal Registry Structures*, as shown in the following example:



Insert into Project dialog box with Portal Registry Structures selected

7. Click Insert.
8. Click Select All, then click Insert again.
9. Click Close.
10. From PeopleSoft Application Designer, select File, Save Project As....
11. Enter the appropriate new project name.

Select the project name from the following table, which shows project names for various portal names. This project is referred to as the Portal Project:

Portal Name	Project Name
EMPLOYEE	PORTAL_APP84X_EMPLOYEE
CUSTOMER	PORTAL_APP84X_CUSTOMER
PARTNER	PORTAL_APP84X_PARTNER
SUPPLIER	PORTAL_APP84X_SUPPLIER

12. Click OK.
13. From PeopleSoft Application Designer, select File, Merge Projects...
14. Enter the project name *PORTAL_PA84X_REGISTRY*.

This merges the objects from the PORTAL_PA84XREGISTRY project into your newly created Portal Project.

15. Select File, Save Project to save the updated Portal Project.
16. Close PeopleSoft Application Designer.

Task E-4-6: Cleaning the Copy of Production Portal Project

In this step, you clean the Copy of Production Portal project so that it contains only the Content Provider registry data.

Important! Before using the Copy of Production Portal project, you must run the Clean Portal Project on the Copy of Production database. Follow the directions on the Clean Portal Project Page.

To clean the Copy of Production Portal project:

1. In your Copy of Production database, select PeopleTools, Portal, Portal Utilities, Clean Portal Project.
2. Add the run control ID, *CLEAN_PORTAL_XXXXXXXX*, where *XXXXXXXX* represents the portal definition name; *EMPLOYEE*, *CUSTOMER*, *SUPPLIER*, or *PARTNER*, for example.
3. In the Project Name field, enter the Portal Project name that you created in the Creating the Copy of Production Portal Project step (*PORTAL_APP84X_[your portal name here]*).
4. Enter a value in the Portal Name field; *EMPLOYEE*, for example.
5. Enter a value in the Content Provider Name field; *CRM*, for example.

Important! Before running the Clean Portal Project, you must enter the Node URI text for the Message Node you selected.

6. Select *Full Navigation*.
7. Click Save.
8. Click Run.
9. Set up the Process Scheduler information and click OK.
10. Select the Process Monitor link to view the progress of the process.

Task E-4-7: Deleting the Copy of Production Database Cache

In this step, you delete the Copy of Production database cache.

To delete the Copy of Production database cache:

1. On your Copy of Production database, start Configuration Manager.
2. On the Startup tab, click Purge Cache Directories.
3. Select the Copy of Production database name.
4. Click Delete.
5. Click OK.
6. Click Close.
7. Click OK to close Configuration Manager.

Task E-5: Comparing the Portal Project

This task applies only to the initial upgrade pass.

In this step, you compare the Portal project that you created in the previous step and then review the compare results. This will enable you to adjust the portal project as necessary before copying it into the PeopleSoft Portal Solutions database.

To compare the Portal Project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select Tools, Compare and Report....
3. Enter the Portal Project name that you specified in the Creating the Copy of Production Portal Project step (PORTAL_APP84X_[your portal name here]).
4. Enter the database name of your target PeopleSoft Portal Solutions database, and the user ID and password.
5. Click the Options button.
6. In the Compare Type field, select *Project*, and click OK.
7. Select all object types and click OK.
8. Close PeopleSoft Application Designer.

Task E-6: Reviewing the Portal Project

This task applies only to the initial upgrade pass.

Review the Portal project (PORTAL_APP84X_[your portal name here]) on the Copy of Production database, looking for customizations that you have applied to your database. Object definitions that you changed have **Changed* or **Unchanged* in the Target column of the compare report. The asterisk (*) indicates that the change was not made by Oracle. Review each of these objects carefully. If Oracle delivered the object, the Source column of the report will read *Changed*. Note the changes that you made to the object. After you complete the upgrade, when you test the system, you can decide whether you still need the customization. You can reapply the customization at that time.

See Appendix: “Using the Comparison Process.”

Task E-7: Copying the Portal Project

This section discusses:

- Understanding Portal Project Copying
- Copying the Portal Project to the Portal Solutions Database
- Deleting the Portal Solutions Database Cache

Understanding Portal Project Copying

This task applies only to the initial upgrade pass.

In this step, you copy the project from your Copy of Production database to your target PeopleSoft Portal Solutions database.

Task E-7-1: Copying the Portal Project to the Portal Solutions Database

Follow the steps below to copy the Portal Project to the PeopleSoft Portal Solutions database.

Important! Before exporting the Portal Project from the Content Provider database, you must successfully clean the Copy of Production Portal Project. If you proceed with this step without cleaning the project, you will overwrite critical PeopleSoft Portal Solutions data.

See Creating the Portal Project, Cleaning the Copy of Production Portal Project.

To copy the Portal Project:

1. Launch PeopleSoft Application Designer and sign in to your Copy of Production database.
2. Select File, Open...
3. In the Definition field, select *Project* and click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To Database...
6. Enter the name of your target PeopleSoft Portal Solutions database, and the user ID and password.
7. Click Select All.
8. Click Copy.

This may take a few minutes.

9. Close PeopleSoft Application Designer.

Note. You do not need to create or alter any records or views.

Task E-7-2: Deleting the Portal Solutions Database Cache

In this step, you delete the PeopleSoft Portal Solutions database cache.

To delete the PeopleSoft Portal Solutions database cache:

1. Delete the target PeopleSoft Portal Solutions database application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

Task E-8: Copying the Portal Project to Production

This section discusses:

- Understanding Portal Project to Production Copying
- Copying the Portal Project to File
- Copying the Portal Project from File
- Deleting the Portal Solutions Database Cache Again

Understanding Portal Project to Production Copying

You must perform this step during both your test and final Move to Production upgrade passes.

Task E-8-1: Copying the Portal Project to File

Follow the steps below to copy the Portal Project to file.

Note. If your Copy of Production and target PeopleSoft Portal Solutions databases run on the same PeopleSoft PeopleTools release and database platform, you can copy the project directly to the target PeopleSoft Portal Solutions database from within the Copy of Production Application Designer and skip the rest of this step.

To copy the Portal Project to file:

1. Launch PeopleSoft Application Designer and sign in to your Copy Production database.
2. Select File, Open....
3. In the Definition field, select *Project* and then click Open.
4. Highlight the newly created Portal Project name (PORTAL_APP84X_[your portal name]) and click Open again.
5. Select Tools, Copy Project, To File....
6. Click the Browse button for the Export Directory.
7. Select a temporary directory and then click OK.
8. Click Select All.
9. Click Copy.
This may take a few minutes.
10. Close PeopleSoft Application Designer.

Task E-8-2: Copying the Portal Project from File

In this step, you copy the Portal Project from file.

To copy the Portal Project from file:

1. Launch PeopleSoft Application Designer and sign in to your target PeopleSoft Portal Solutions database.
2. Select Tools, Copy Project, From File....
3. Browse to the Copy of Production database server's temporary directory.
If you cannot access the Copy of Production database server's temporary directory, then copy the Portal Project folder and files from the temporary directory to the target PeopleSoft Portal Solutions database server's *PS_HOME\PROJECTS* directory, and browse to that directory.
4. Select the Portal Project name that you just copied to file in the previous step.
5. Click Open.
6. Click Select All.
7. Set the project language options as follows:
 - a. Click Options.
 - b. In the Copy Options tab, select *English*, and *COMMON*.

- c. If your PeopleSoft Portal Solutions database is a multi-language database, then also select the languages that you have installed on your PeopleSoft Portal Solutions database.
- d. Click OK.
8. Click Copy.
9. Select the Upgrade tab and view the Output window.
All objects should have copied successfully.
10. Close PeopleSoft Application Designer.

Note. After the copy, you do not need to create or alter any records or views on the target PeopleSoft Portal Solutions database.

Task E-8-3: Deleting the Portal Solutions Database Cache Again

In this step, you delete the PeopleSoft Portal Solutions database cache.

To delete the PeopleSoft Portal Solutions database cache:

1. Delete the target PeopleSoft Portal Solutions database's application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

Task E-9: Deleting Obsolete Folders

This section discusses:

- Understanding Obsolete Folder Deletion
- Deleting Obsolete Folders on Portal Solutions 8.4
- Deleting Obsolete Folders on Portal Solutions 8.8

Understanding Obsolete Folder Deletion

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

In this step, you delete folders on your target PeopleSoft Portal Solutions database that the Portal Registry Structures no longer reference. The process that you run depends on your version of PeopleSoft Portal Solutions.

Task E-9-1: Deleting Obsolete Folders on Portal Solutions 8.4

Follow this procedure to delete obsolete folders on PeopleSoft Portal Solutions 8.4.

To delete obsolete folders on PeopleSoft Portal Solutions 8.4:

1. Using PeopleSoft Data Mover, sign in to your target PeopleSoft Portal Solutions database.
2. Run the following PeopleSoft Data Mover script, located in the PeopleSoft Portal Solutions PS_HOME\SCRIPTS directory:

```
PORTAL_REG_FOLDER_DEL.DMS
```

3. Close PeopleSoft Data Mover.

Task E-9-2: Deleting Obsolete Folders on Portal Solutions 8.8

Follow this procedure to delete obsolete folders on PeopleSoft Portal Solutions 8.8 or higher.

To delete obsolete folders on PeopleSoft Portal Solutions 8.8 or higher:

1. On your target PeopleSoft Portal Solutions database, navigate accordingly:
 - a. For PeopleSoft Portal Solutions 8.8: Portal Administration, Navigation, Run Folder Cleanup.
 - b. For PeopleSoft Portal Solutions 8.9 or higher: Portal Administration, Navigation, Delete Empty Folders.
2. Add a run control as follows:
 - a. Enter a value for the run control ID. The run control ID is *FOLDER_CLEAN_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
 - b. Click Add.
3. Enter a value in the Portal Name field.

This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task E-10: Updating Registry Folder Permissions

This section discusses:

- Understanding Registry Folder Permissions Updates
- Updating Portal Solutions Registry Folder Permissions
- Deleting the Portal Solutions Cache

Understanding Registry Folder Permissions Updates

This task applies to all upgrade passes: Initial, Test Move to Production, and Final Move to Production.

Portal data from different Content Provider databases may share a common portal folder. After copying the registry projects, you must update the folder permissions to reflect the changes. After you update the folder permissions, you must delete the target PeopleSoft Portal Solutions database cache files to propagate the changes.

Task E-10-1: Updating Portal Solutions Registry Folder Permissions

Follow this procedure to update your PeopleSoft Portal Solutions registry folder permissions.

Note. This process will take between a few minutes to a few hours, depending on the volume of portal data. The user ID that invokes this process must have the security role Portal Administrator, or the process may terminate with an abend.

To update the PeopleSoft Portal Solutions folder permissions:

1. On your target PeopleSoft Portal Solutions database, select PeopleTools, Portal, Portal Security Sync.
2. Add a run control as follows:
 - a. Enter a value for the run control ID.
The run control ID is *SECURITY_SYNC_XXXX*, where *XXXX* represents the portal registry name (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
 - b. Click Add.
3. Enter a value in the Portal Name field.
This value must match the portal registry name that you used to replace *XXXX* in the run control ID (EMPLOYEE, CUSTOMER, PARTNER, or SUPPLIER).
4. Click Save.
5. Click Run.
6. Set up the process scheduler information and click OK.
7. Click the Process Monitor link to view the progress of the process.

Task E-10-2: Deleting the Portal Solutions Cache

In this step delete the PeopleSoft Portal Solutions cache.

To delete the PeopleSoft Portal Solutions cache:

1. Delete the target PeopleSoft Portal Solutions database application server cache.
2. Stop and restart the target PeopleSoft Portal Solutions database web server service.

APPENDIX F

Using Data Conversion Utilities

This appendix discusses:

- Understanding Data Conversion Utilities
- Using the UPGDATA CONV 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_DATA CONV and the PS_UPG_DATA CONV 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 F-1: Using the UPGDATA CONV Process

This section discusses:

- Understanding the UPGDATA CONV Process
- Reviewing the Data Conversion Report

Understanding the UPGDATA CONV Process

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

Task F-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 UDATAACNV.

To run UDATAACNV:

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

PF88
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 F-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 EOUPDATAACNV
- Reviewing EO Upgrade Framework Reporting

Task F-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 F-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 UPGDATA CONV 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_DATA CONV 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 PSEOUF_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')	<ul style="list-style-type: none"> • 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	<p>For example:</p> <ul style="list-style-type: none"> • 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	<p>For example:</p> <ul style="list-style-type: none"> • 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;; <p>Where:</p> <p><i>SQLid</i>: Specify the name of an existing SQL definition.</p> <p><i>paramlist</i>: 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.</p> <p>Note. The paramlist arguments must be static values. Variable values in the paramlist are not permitted.</p> <p>Note. The Query is resolved at the time the Data Conversion Analysis is executed. It is NOT resolved during the Data Conversion Runtime.</p> <p>Note. The Query must return one or more valid RECNAME values. No other return results are permitted.</p>
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.	<p>REM SQLANALYSIS:T::S:PS_EOUF_NORECNAME;</p> <p>Note. The “REM SQLANALYSIS:T::S;” syntax is not a valid override and will be marked as “Invalid” by the EOUFANALYSIS Program.</p>

- 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 F-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 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 F-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 EOUFDATA CONV 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 EOUFDATA CONV in parallel, executing against a single set of dependency information. The optimal number of instances to be initiated will vary.

EOUFDATA CONV 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 EOUFDATA CONV that encountered the error will mark the step as “Failed” and stop. All other instances of EOUFDATA CONV 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 F-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 F-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 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 EOUF_DATACONV 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 F-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 F-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 Upgrade Setup, Define Upgrade Drivers.
3. Enter your upgrade path:

PF88

4. 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 Drivers									
Customize Find View All First 1-25 of 86 Last									
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 F-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 Upgrade Setup, Define Upgrade Driver.
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 F-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 Upgrade Setup, Define Upgrade Drivers.
3. Enter your upgrade path:

PF88

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

APPENDIX G

Using the Comparison Process

This appendix discusses:

- Understanding the Comparison Process
- Understanding Upgrade Compare Reports

Task G-1: Understanding the Comparison Process

This section discusses:

- Reviewing the Source and Target Columns
- Reviewing the Action Column
- Reviewing the Upgrade Column
- Putting It All Together

During the upgrade you run a compare process and then review the resulting reports. The compare process first compares every property of an object definition on the Source database to the properties of object definitions on the Target database. The PeopleSoft system tracks object changes using the contents of the PSRELEASE table, and the value of two fields, LASTUPDDTTM, and LASTUPDOPRID, used in the PeopleSoft PeopleTools tables, as follows:

- The PSRELEASE table maintains the Comparison Release Level. This table contains rows of data for every release level at which the database has ever existed. The first column in this table, RELEASEDTTM, contains a date/time stamp identifying when each release level was “stamped.” The second column, RELEASELABEL, identifies the release level. The format of a release label is *M XX.XX.XX.YYY*, where *M* is the market code, *XX* is an integer from 0 to 99, and *YYY* is an integer from 0 to 999. A release label has two parts: the PeopleSoft release number (*M XX.XX.XX*) and the customer release number (*YYY*). Each time you customize your production database, you can stamp it with a new customer release level to help you track your changes over time. You should not change any portion of the PeopleSoft release number unless specifically instructed to do so.
- The LASTUPDDTTM field in our *PSobjectDEFN* tables—such as PSRECDEFN, PSPNLDEFN, and so on—stores a date/time stamp of when each object was last modified.
- The LASTUPDOPRID field stores the operator ID of the user who made the modification. If Oracle made the modification, the proprietary ID *PPLSOFT* is used.

Note. Maintain Security prevents you from creating an operator named PPLSOFT.

If an object definition is defined differently in the Source database than in the Target database, the compare process will check to see whether either object definition has changed since the comparison release. If the object's LASTUPDDTTM value is greater than the RELEASEDTTM value for the comparison release level (stored in PSRELEASE), the object has changed. If the object's LASTUPDDTTM value is equal to or less than RELEASEDTTM, the object has not changed (since the comparison release). Whether the compared object has changed or not, if it has *ever* been changed prior to the comparison release by someone other than Oracle (LASTUPDOPRID does not equal 'PPLSOFT'), the object is identified as a customization.

After you run a compare report, you see the following information when you open an object type in the upgrade project from the Upgrade Tab of PeopleSoft Application Designer. This is called the PeopleSoft Application Designer Upgrade Definition window.

Task G-1-1: Reviewing the Source and Target Columns

The status of each object is reported as it appears on the Source database and the Target database. The following table explains the various status types:

Status Type	Definition
Unknown	The object has not been compared. This is the default status for all objects inserted manually into a project and the permanent status of all non-comparison objects.
Absent	The object was found in the other database, but not in this one. When upgrading to a new PeopleSoft release, all of our new objects should have Absent status in the Target database and all of your new objects should have Absent status in the Source database.
Changed	The object has been compared, its LASTUPDOPRID value is <i>PPLSOFT</i> , and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In other words, Oracle modified the object since the comparison release.
Unchanged	The object has been compared, its LASTUPDOPRID value is <i>PPLSOFT</i> , and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In other words, Oracle last modified the object prior to the comparison release.
*Changed	The object has been compared, its LASTUPDOPRID value is not <i>PPLSOFT</i> , and its LASTUPDTIME value is greater than the date/time stamp of the comparison release database. In this case, the customer has modified the object since the comparison release.

Status Type	Definition
*Unchanged	The object has been compared, its LASTUPDOPRID value is not <i>PPLSOFT</i> , and its LASTUPDTIME value is less than or equal to the date/time stamp of the comparison release database. In this case, the customer last modified the object prior to the comparison release.
Same	The object has been compared and is defined as the same in both databases. When an object in one database has this status, so will its counterpart in the other database. This status would never be seen when performing a database comparison because in that case, the project is only populated with objects defined differently. However, it can occur when performing a project comparison because in a project comparison, the project contents are static; the project is not repopulated based on the comparison results.

Task G-1-2: Reviewing the Action Column

The default actions for each object that you compared are reported in the Action column. The compare sets the action column based on what you need to do to make the Target database consistent with the Source database. You should not change these actions. You can decide whether or not to accept each action by setting the Upgrade value. The following table explains the various action types:

Action Type	Definition
Copy	Object will be added to the Target database
Copy Prop (Records and Fields only)	Object will be added to the Target database
Delete	Object will be deleted from the Target database.
None	No action will be taken on this object.

The PeopleSoft system assigns one of these action types to every object in a comparison project and in the compare reports. However, these actions are not necessarily carried out during the copy process. The value of the Upgrade column for each object makes that determination.

Task G-1-3: Reviewing the Upgrade Column

The Upgrade values for each object – YES or NO – determine whether the object action will be carried out during the copy process. The upgrade orientation you assign during the compare process determines these settings. You can orient the Upgrade to keep Oracle changes or to retain your changes in the Target database. Whichever orientation you choose, you will still have the option to set each Upgrade value individually before launching the copy process.

You may find that after the compare process, your project contains objects that show up as Unchanged on the Demo database and Changed on the Copy of Production and the Upgrade column is not checked. What this status combination means is that the PeopleSoft object on your Copy of Production was changed more recently than on the Demo database. In these instances, Oracle recommends that you accept the Demo database version of the object.

Task G-1-4: Putting It All Together

The following chart summarizes every possible Status, Action, and Upgrade value that could be set by the compare process to a single object:

Source Status	Target Status	Action	Oracle-delivered	Keep Customizations
(Any)	Absent	COPY	YES	YES
Absent	Changed or Unchanged	DELETE	YES	YES
Absent	Changed* or Unchanged*	DELETE	NO	NO
Changed	Changed or Unchanged	COPY	YES	YES
Changed	Changed* or Unchanged*	COPY	YES	NO
Unchanged	Changed	COPY	NO	NO
Unchanged	Unchanged	COPY	YES	YES
Unchanged	Changed* or Unchanged*	COPY	YES	NO
Changed*	Changed or Unchanged	COPY	NO	YES
Changed*	Changed* or Unchanged*	COPY	YES	YES
Unchanged*	Changed or Unchanged	COPY	NO	YES
Unchanged*	Changed*	COPY	NO	NO
Unchanged*	Unchanged*	COPY	YES	YES

Task G-2: Understanding Upgrade Compare Reports

This section discusses:

- Reviewing Report Columns
- Using Reports

When you run the compare process, it creates reports to help you understand what objects differ between the Source and Target databases, and how they differ. If you have documentation of your database modifications, you should retrieve it before reviewing these reports. This will help you understand how the Target objects have changed and enable you to better compare the Target version of the object with the Source version. If you are upgrading to a new PeopleSoft release, you should also review the release notes for your product. These notes will identify and explain object changes in the New Release Demo database.

Upgrade reports can be a little intimidating at first glance, until you understand what data you are looking for and how best to use it. This section includes information to help you use the reports.

Task G-2-1: Reviewing Report Columns

For the most part, the columns in upgrade reports correspond with the columns you see in PeopleSoft Application Designer's upgrade definition window. Moving from left to right, you see the Name of the object, then other key columns that vary by object type, then the Source and Target status, the Action value and Upgrade flag (*Yes* or *No*).

After these columns are three more that are not included in PeopleSoft Application Designer. The first is Attribute. This tells you the type of difference that was found between the two objects. For example, record field attribute values include *Use/Edit*, which identifies key or audit differences, and Default Field Name (*Def. Fldnm*), which identifies differences in a default value. Lastly, there is a Source column and a Target column. These wide columns display the actual differences between the object definitions. For example, on a *Use/Edit* attribute recfield difference, the Source column might contain *Xlat Table Edit* while the Target column is empty. This means that the Source record field has a translate table edit while the Target record field does not.

If you are unsure of the meaning of any value in the last three report columns, open the PeopleSoft PeopleTools tool that edits the particular object. The values in these columns correspond directly to dialog options in the tool.

Task G-2-2: Using Reports

Oracle delivers several cross-reference reports that you can run to provide information about the inter-relationships between various objects. Oracle delivers these reports in the form of SQRs (found in *PS_HOME\SQR*), Crystal Reports (found in *PS_HOME\CRW\ENG*), and Queries.

The following table describes the various cross-reference reports:

Object Type(s)	Report Name	Report Description
Applications and Fields	XRFAFPL	Lists all application windows, such as General Tables, in alphabetical order, as well as the fields within each window. For each field, the report details the Field Name, Field Type, Length, and Format, as well as all the record and page definitions that contain the field (within the window).
Fields Referenced by PeopleCode Programs	XRFFLPC	Lists all PeopleCode programs in alphabetical order by associated record definition/field. The report includes type of field and lists all fields referenced in the PeopleCode program.
Fields and Panels	XRFFLPN	Lists all fields in alphabetical order. The report includes the names of all record and page definitions in which each field is used, as well as the Long Name of each field.
Records and Fields	XRFFLRC	Lists all fields in alphabetical order. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field, and includes the names of all record definitions that contain the field.
Field Listing	XRFIELDLS	Lists all fields in alphabetical order. The report includes Field Type, Length, Format, Long Name and Short Name.

Object Type(s)	Report Name	Report Description
Menu Listing	XRFMENU	Lists application windows in alphabetical order. The report details all menus within each window, and all page definitions within each menu. It also includes the associated search record definition name and detail page definition name.
Panel Listing	XRFPANEL	Lists all page definitions in alphabetical order.
PeopleCode Programs and Field References	XRFPCL	Lists record definitions that contain fields with PeopleCode program attributes. The report includes the Field Name, as well as the associated record definitions and fields referenced in the PeopleCode program.
Panels with PeopleCode	XRFNPC	Lists all pages that contain fields with PeopleCode attributes. For each page, the report includes the name of the record definition(s) that contain the field as well as the Field Name and Type.
Fields and Records	XRFRCFL	Lists all fields in alphabetical order by associated record definition name. The report details the Long Name, Field Type, Field Length, and Formatting specified for the field.
Records and Panels	XRFRCPN	Lists all record definitions in alphabetical order. The report includes the menu and page definitions associated with each record definition.
Window Listing	XRFWIN	Lists all application windows in alphabetical order.

In addition to using our standard cross-reference reports, you can also generate ad hoc reports to extract the exact combination of information you need. Or, you can create permanent custom reports for information you extract on a regular basis.

Oracle recommends that you mark your upgrade reports using a color-coding system to help you quickly identify what you need to do to certain objects.

If you have several people reviewing sections of the reports, a good documentation policy is to have everyone on your review cycle initial and date the action defaults and overrides they select.

You may also find it easier to change some objects manually after the upgrade, rather than copying the new versions from the Source database.

Index

A

- ACE model, reloading 213
- activating
 - application messages 209
 - security groups 210
- AE SYNCIDGEN, running 179
- ALLTABS project, creating 158
- ALLTEMPTABS project, creating 158
- alter analyzer
 - loading data 49
- alter analyzer loader
 - running 132
- Alter Audit
 - final, reviewing 194
 - final, running 193
 - running initial 19
- alter tables script, running 161
- alter timestamps script 1, running 121
- alter timestamps script 2, running 121
- alter timestamps script 3, running 121
- alter timestamps script 4, running 122
- alter timestamps script 5, running 122
- alter timestamps script 6, running 122
- alter timestamps script 7, running 122
- alter timestamps script 8, running 123
- alter with deletes script
 - building 178
 - running 178
- Analytic Calculation Engine model, *See* ACE model
- application
 - running security processing 218
- application changes
 - preparing 127
- application conversion
 - completing 191
- application engine
 - EOUFPOPPROJ 156
 - PTALTANLYZR 150
- application information queries, running 25
- application messages
 - activating 209
 - exporting 166
 - importing 166
- application messaging
 - objects, deleting 93
 - objects, saving 93
- application rules
 - recompiling 221
- application servers
 - configuring 125
 - granting administrator permissions 52
 - updating REN servers 88
- application system data
 - exporting 187
 - importing 187
- application tablespace properties, editing 62
- application tablespaces for Informix, creating 80
- application tablespaces, creating 80
- applying
 - fixes after copying project 248
 - fixes after data conversion 249
 - fixes between upgrade passes 249
 - fixes during installation 248
 - fixes during Move to Production 250
 - updates before data conversion 172
 - UPGOPT project 14
 - upgrade planning files 14
- assigning
 - data origins, default 36
 - source system IDs, default 36
 - source system IDs, table-specific 36
- associating
 - employee IDs to user IDs 27
- auditing
 - character length semantics 113
 - date to timestamp conversion 116
 - disabled constraints 101
 - duplicate length constraints 101
 - long to LOB conversion 106
- audits
 - Alter Audit 19
 - DDDAUDIT, final 193
 - DDDAUDIT, initial 17
 - final 192
 - initial 17
 - SYSAUDIT, final 193

SYSAUDIT, initial 18
 AVS charts
 installing the charting tool 236

B

backing up
 after data conversion 177
 after PeopleTools upgrade 125
 after preparing your database 50
 after upgrade copy 149
 before conversion 173
 before converting data types 115
 before platform changes 98
 before testing 239
 business unit tables 225
 Copy of Current Demo database 11
 demo again 149
 demo databases 11
 New Release Demo database 12
 base data, loading 85
 blueprints
 associating 227
 BP_CF9B_AK_SBR changes, analyzing
 impact 38
 Budgeting 142
 checking in activities 37
 exporting line item data 37
 performing activities 37
 preparing to upgrade 46
 building
 alter with deletes script 178
 create temp tables script 158
 EOUF_UPGRADE_
 FRAMEWORK 151
 optional temporary tables script 157
 tablespace alter script 84
 UPGOPT project 14
 UPGSYNC alter script 153
 building temporary tables script
 building 157
 business units
 backing up tables 225
 enabling PS/Query objects 227
 running PS/Query objects 228
 upgrading legacy mappings 225
 validating mappings 229

C

Change Assistant

 creating new job 243
 editing multilingual step properties 63
 change control
 reviewing 238
 turning off 71
 character length script 1, running 109
 character length script 2, running 109
 character length script 3, running 109
 character length script 4, running 109
 character length script 5, running 110
 character length script 6, running 110
 character length script 7, running 110
 character length script 8, running 110
 character length semantics, auditing 113
 ChartFields
 refreshing 209
 charting tool
 installing 236
 checking in
 Budgeting activities 37
 cleaning
 metadata and search table 183
 cleaning up
 PeopleTools data 41
 CLS drop indexes script 1, running 107
 CLS drop indexes script 2, running 107
 CLS drop indexes script 3, running 107
 CLS drop indexes script 4, running 107
 CLS drop indexes script 5, running 108
 CLS drop indexes script 6, running 108
 CLS drop indexes script 7, running 108
 CLS drop indexes script 8, running 108
 CLS rebuild indexes script 1, running 111
 CLS rebuild indexes script 2, running 111
 CLS rebuild indexes script 3, running 111
 CLS rebuild indexes script 4, running 111
 CLS rebuild indexes script 5, running 112
 CLS rebuild indexes script 6, running 112
 CLS rebuild indexes script 7, running 112
 CLS rebuild indexes script 8, running 112
 common portal system options
 exporting 188
 importing 188
 compare options, modifying 7, 128
 compare reports
 columns 296
 reviewing 136
 understanding 296
 using 297
 comparing

- customizations 43
 - new release 135
 - running UPGCUST 43
- comparing PeopleTools objects
 - queries and trees, preserving 261
- comparison process
 - default actions for objects 295
 - settings for objects 295
 - status of objects 294
 - Upgrade column 295
 - using 293
- completing
 - application conversion 191
 - Portal data conversion 203
- completing system setup
 - exporting EDI statements 184
 - exporting mass change data 185
 - exporting strings data 184
 - exporting XML service data 185
 - importing EDI statements 185
 - importing mass change data 185
 - importing strings data 184
 - importing XML service data 186
 - loading data 183
- Configuration Manager profile,
 - updating 54
- configuring
 - application servers 125
 - Portal 198
 - Process Scheduler 125
 - upgrade environment 198
 - web server 198
- CONNECT ID, granting permissions 100
- connect ID, granting privileges to 66
- connector passwords, encrypting 90
- consolidation processes
 - upgrading 211
- Content Provider registry
 - upgrading 237
- content reference permissions,
 - synchronizing 201
- conversion
 - Integration Broker 59
 - loading data 90
 - reporting details 91
 - running data conversion 91
- conversion audit tables, creating 116
- conversion reports, reviewing 113
- conversion scripts
 - Oracle, generating 102
 - timestamp, generating 116
- converting
 - database data types 95
 - Integration Broker 92
 - Integration Broker objects 94
 - Oracle time data types 114
 - PeopleTools objects 88
 - Portal objects 89
 - query prompt headings 90
- Copy of Current Demo database
 - backing up 11
- Copy of Production
 - creating 4
 - testing 239
- Copy of Production database
 - backing up 125
- Copy of Production database cache,
 - deleting 268
- copy results, reviewing 141
- copying
 - EOUF_UPGRADE_
 - FRAMEWORK 151
 - PATCH85X project 79
 - PATCH85XML project 79
 - Portal Solutions database 267
 - PPLTLS84CUR project 75
 - PPLTLS84CURDEL project 78
 - PPLTLS84CURML project 76
 - PPLTLSML project 77
 - production database 4
 - projects 75
 - PT84TBLSPC project 83
 - UPGCUST 141
 - UPGIB 143
 - UPGNONCOMP 143
 - UPGSYNC project 131
 - UPGSYNC project definition 131
 - UPGSYNCTEMP project 131
- create and alter process
 - optimizing 8
- create and alter scripts
 - building 158
 - editing 159
- create indexes script, running 179
- create tables script
 - running 161
- create temp table script
 - building 158
- create triggers script, running 179
- create upgrade tables script

- building 156
- CREATEVW, running 180
- creating
 - a copy of DBField 46
 - all views 180
 - ALLTABS project 158
 - ALLTEMPTABS project 158
 - application tablespaces 80
 - application tablespaces for Informix 80
 - conversion audit tables 116
 - custom tablespaces 148
 - delivered tablespaces 147
 - FNLALTAUD project 193
 - indexes 161
 - INITALTAUD project 18
 - Integration Broker objects 92
 - Microsoft conversion project 99
 - new Change Assistant job 243
 - new tablespaces 147
 - Oracle audit tables 101
 - PPLTOOLS views 91
 - RUNSTATS.DAT 69
 - target Portal Solutions project 269
 - temporary performance indexes 67
 - temporary tables 160
 - updated PeopleTools views 91
 - UPGIB 136
- customizations
 - comparing 43
 - identifying 9
 - reapplying 199
- customized objects
 - adjusting 199

D

- data
 - base data, loading 85
 - conversion data, loading 90
 - data conversion, running 91
 - English messages, loading 86
 - English string data, loading 87
 - language data, loading 86
 - MCF data, populating 88
 - PeopleTools data, loading 86
 - stored statements data, loading 87
- data conversion
 - analysis 150
 - applying updates before 172
 - backing up after 177
 - loading data 165

- loading data for PeopleTools 90
- performing 177
- reporting details 91
- running for application changes 173
- running for PeopleTools changes 91
- understanding 174
- data conversion analysis
 - preparing 150
- data conversion analyzer
 - running 173
- data conversion driver data
 - exporting 171
 - importing 171
- data conversion report, reviewing 282
- data conversion, completing for
 - Portal 203
- data mapper, reloading rule set
 - columns 217
- data model definitions, loading
 - DB2 UNIX/NT 72
 - DB2 z/OS 72
 - Informix 72
 - Oracle 72
 - SQL Server 73
 - Sybase 73
- data origins
 - assigning default 36
 - considerations for defining 35
- data type steps, editing 63
- data types
 - backing up before converting 115
 - Oracle time, converting 114
- database
 - increasing space 4
- database cache
 - deleting from Copy of Production 268
- database data types, converting 95
- database options
 - updating for timestamp 67
- database options flag, resetting 69
- database options, updating 114
- database servers, backing up 125
- database structure
 - finalizing 178
 - modifying 154
- databases
 - preparing for the upgrade 39
 - stamping 238
 - Tree/Query Copy of Production 260
 - updating overrides 145

- verifying integrity 39
- DB2
 - editing upgrade planning scripts 16
- DB2 scripts
 - editing 5
- DB2 UNIX RUNSTATS script,
 - generating 164
- DB2 UNIX/NT
 - loading data model definitions 72
 - rerunning RUNSTATS 69
 - updating statistics 70
- DB2 z/OS
 - backing up database 155
 - editing create table scripts 57
 - editing MTP import scripts 57
 - loading data model definitions 72
 - updating statistics 69
- DB2TMPIDXCREATE script 67
- DBField table
 - creating a copy 46
- DBTSFIX output scripts
 - editing 55
 - running 65
- DBTSFIX script, running 55
- DDDAUDIT script
 - final, running 193
 - running initial 17
- DDL parameters, editing 59
- DDLDB2 script
 - running 72
- DDLDBX script
 - running 72
- DDLIFX script
 - running 72
- DDLMSS script, running 73
- DDLORA script
 - running 72
- DDLSYB script, running 73
- defining
 - data origins, considerations for 35
 - source system IDs 207
 - source system IDs, considerations for 34
 - warehouse sources 226
- deleting
 - application messaging objects 93
 - Copy of Production database cache 268
 - node transactions 94
 - obsolete objects 220

- Pagelet Wizard Common Components
 - data 49
 - system metadata 182
- Dimension Mapper
 - running ETL jobs 225
 - upgrading legacy business unit mappings 225
- dimension metadata system data
 - exporting 187
 - importing 188
- disabled constraints, auditing 101
- DLPFUPN01
 - running 128
- driver IDs, Planning and Budgeting
 - updating 191
- drop indexes script 1, running 119
- drop indexes script 2, running 119
- drop indexes script 3, running 119
- drop indexes script 4, running 120
- drop indexes script 5, running 120
- drop indexes script 6, running 120
- drop indexes script 7, running 120
- drop indexes script 8, running 121
- dropping PeopleTools tables 41
- dropping tables
 - running DLPFUPN01 128
 - running PUBGN01 47
 - running PUFTX01 48
 - running PUPFX01 49
 - running PUPPKN01 48
 - running PUUPJ01 47
- duplicate data, removing 182
- duplicate length constraints, auditing 101

E

- EDI tables, identifying 9
- editing
 - data type steps 63
 - DB2 scripts 5
 - DB2 z/OS create table scripts 57
 - DB2 z/OS MTP import scripts 57
 - DBTSFIX output scripts 55
 - DDL parameters 59
 - GRANT script 56
 - language swap script 6
 - Move to Production import scripts 57
 - multilingual step properties 63
 - MVPRDIMP script 58
 - PF_OWNER script 33
 - PPLTLS84CURTABLES script 82

- PTxxxTLS scripts 56
- pupfnownermap03.dms script 33
- PUPPKJ02.DMS 30
- tablespace alter script 84
- upgrade planning DB2 scripts 16
- UPGSYNC alter script 153
- employee IDs
 - associating to user IDs 27
- Employee Total field, populating 214
- enabling
 - business unit PS/Query objects 227
 - Global Consolidations queries 21
- encrypting connector passwords 90
- Enterprise Warehouse
 - preparing to upgrade EWC 46
- EOUF_UPGRADE_FRAMEWORK
 - building 151
 - copying 151
 - running 151
- EOUFPOPPROJ 156
- errors
 - application rule compilation 257
 - mass compile 255
 - metadata audit 255
- exporting
 - application messages 166
 - application system data 187
 - common portal system options 188
 - data conversion driver data 171
 - dimension metadata system data 187
 - Feed data 170
 - installation data 66
 - KPI calculation definitions 219
 - line item Budgeting data 37
 - new release objects 144
 - node transactions 93
 - Pagelet Wizard application data 169
 - Pagelet Wizard data 169
 - PeopleTools system tables 68
 - PeopleTools tables, re-exporting 262
 - personalizations 190
 - project definitions 128
 - record groups 167
 - related language system data 186
 - selected PeopleTools tables 140
 - setup data 189
 - system setup data 168
 - upgrade defaults 170

F

- Feed data
 - exporting 170
 - importing 170
- file servers
 - editing PTxxxTLS scripts 56
- final audit reports, running 192
- fixes
 - applying after copying project 248
 - applying after data conversion 249
 - applying between upgrade passes 249
 - applying during installation 248
 - applying during Move to Production 250
- fixing
 - KPI assessment images 234
 - KPI calculation definitions 222
 - Scorecard user defaults 233
 - Scorecard user security 231
- FNLALTAUD project, creating 193

G

- generating
 - DB2 UNIX RUNSTATS script 164
 - Microsoft conversion scripts 99
 - Oracle conversion scripts 102
 - PPLTLS84CURTABLES script 82
 - source lineage 227
 - timestamp conversion scripts 116
- getting started 13
- Global Consolidations
 - enabling queries 21
 - evaluating duplicate entries 20
 - running journal publish rule query 24
 - running queries 23
 - upgrading consolidation processes 211
 - upgrading journal publish mapper rules 230
- GRANT script
 - editing 56
 - running 66
- granting
 - home page personalization access 202
 - permissions to CONNECT ID 100
 - privileges to connect ID 66

H

- home page personalization access, granting 202

I

- identifying
 - custom object types 36
 - customizations 9
 - EDI tables 9
 - mass change 9
 - PF_OWNER values, custom 32
 - project request IDs, duplicate 27
 - source system IDs, default 35
- IDs, project, *See* project request IDs
- images, shrinking 42
- importing
 - application messages 166
 - application system data 187
 - common portal system options 188
 - data conversion driver data 171
 - DB2 z/OS-specific information 57
 - dimension metadata system data 188
 - Feed data 170
 - KPI calculation data 222
 - KPI calculation definitions 220
 - new release objects 144
 - Pagelet Wizard application data 169
 - Pagelet Wizard data 169
 - PeopleTools system tables 68
 - personalizations 190
 - project definitions 128
 - record groups 167
 - related language system data 186
 - selected PeopleTools tables 141
 - setup data 189
 - system setup data 168
 - upgrade defaults 171
- increasing space, log file and database 4
- index parameters
 - setting 162
- indexes
 - creating 161
 - parameters, setting after copy 145
 - reviewing the create indexes log 162
 - temporary performance, creating 67
- Informix
 - loading data model definitions 72
 - updating statistics 70
- INITALTAUD project, creating 18
- initial audits
 - reviewing 19
 - running 17
- installation data, exporting 66

- installation, applying fixes during 248
- installing
 - charting tool 236
- integrating
 - Workforce Analytics with position budgeting data 214
- Integration Broker
 - converting 92
 - converting objects 94
 - defaults, updating 92
 - deletes, preparing 93
 - objects, creating 92
- Integration Broker conversion 59

K

- Key Performance Indicator 236
 - See Also* KPI
- KPI
 - fixing assessment images 234
 - updating dimension member descriptions 236
- KPI assessments
 - fixing invalid images 234
- KPI calculation data
 - importing 222
- KPI calculation definitions
 - exporting 219
 - fixing 222
 - importing 220
- KPI manager queries
 - running 25

L

- language data, updating 191
- language swap scripts
 - editing 6
- language system data
 - exporting related 186
 - importing related 186
- languages
 - loading data 86
 - populating 85
 - swapping on system data 166
- ledger templates
 - refreshing user-defined 209
- license code, updating 66
- loading
 - ACE model, reloading 213
 - alter analyzer data 49

- base data 85
- conversion data 90
- data for data conversion 165
- data model definitions 71
- data to complete system setup 183
- English messages 86
- English string data 87
- language data 86
- message data 73
- noncomparable objects 86
- OBJECTOWNERID values 32
- PeopleTools data 86
- PeopleTools definition security
 - group 87
- personalizations 190
- stored statements data 87
- system data into upgrade table 181
- system messages 73
- local message node, preserving 135
- log
 - reviewing for pagelet and collection issues 203
- log file, increasing space 4
- long data audit, running 98
- long to LOB conversion, auditing 106
- long to LOB script 1, running 104
- long to LOB script 2, running 105
- long to LOB script 3, running 105
- long to LOB script 4, running 105
- long to LOB script 5, running 105
- long to LOB script 6, running 106
- long to LOB script 7, running 106
- long to LOB script 8, running 106

M

- mass change, identifying 9
- mass compile
 - running 216
 - running, second pass 223
- menu pagelet values
 - setting 190
- message data
 - loading 73
 - loading English messages 86
- message data, cleaning up 65
- message queues, purging 40
- metadata
 - cleaning 183
 - prepare for mass compile 180
 - synchronizing 214

- metadata audit
 - reviewing results 224
 - running 223
- metadata audit, reviewing errors 255
- metadata, system
 - deleting 182
 - reviewing, changed 181
 - reviewing, customized 182
 - reviewing, new 181
- Microsoft conversion project, creating 99
- Microsoft conversion report, running 100
- Microsoft conversion scripts,
 - generating 99
- Microsoft conversion scripts, running 100
- Microsoft database, validating 98
- Microsoft settings, reviewing 99
- migrating records 83
- model definition data, loading 72
- model definitions, *See* data model definitions
- modifying
 - compare options 7, 128
 - database structure 154
- modifying BP_CF9B_AK_SBR
 - subrecord 142
- Move to Production
 - editing import scripts 57
 - editing password 58
 - performing 244
 - testing 241
 - understanding 242
- MultiChannel Framework (MCF) data 88
- multilingual step properties, editing 63
- MVPRDIMP script, editing 58

N

- New Copy of Production database
 - importing data 57
- new release
 - exporting objects 144
 - importing objects 144
- new release database
 - backing up again 149
- New Release Demo database
 - backing up 12
- node transactions
 - deleting 94
 - exporting 93
- non-comparable objects, reviewing 137
- notes and tips, for your upgrade 3

O

- object types, custom
 - identifying 36
- object version numbers
 - setting 95
 - updating 192
- object version numbers, resetting 145
- OBJECTOWNERID values
 - loading 32
 - upgrading 31
- obsolete objects
 - deleting 220
- Operational Warehouse - Enriched, *See* OWE
- optimizing
 - create and alter process 8
- Oracle
 - loading data model definitions 72
 - updating statistics 70
- Oracle audit tables, creating 101
- Oracle conversion scripts, generating 102
- Oracle database, validating 100
- Oracle settings, reviewing 102
- OWE
 - upgrading 34

P

- pagelet and collection log 203
- pagelet publishing, enabling 204
- Pagelet Wizard
 - exporting application data 169
 - exporting data 169
 - importing application data 169
 - importing data 169
- Pagelet Wizard Common Components data,
 - deleting 49
- password, Move to Production 58
- passwords, encrypting connector
 - passwords 90
- patch information, updating 67
- patch, PeopleTools 60
- PATCH85X project 79
- PATCH85XML project 79
- PeopleTools
 - data, loading 86
 - definition security group, loading 87
 - exporting system tables 68
 - functionality 205
 - importing system tables 68

- objects, converting 88
- objects, reviewing 73
- re-exporting tables 262
- script 82
- tables, dropping 41
- updating patch information 67
- updating system tables 64
- upgrade, backing up after 125
- upgrading Portal Solutions 267
- PeopleTools conversion
 - completing 192
- PeopleTools data, cleaning up 41
- PeopleTools patch, preparing for 60
- PeopleTools tables
 - exporting 140
 - importing 141
 - swapping languages 142
- performing
 - Budgeting activities 37
- permission lists
 - updating Portal registry 268
- permissions lists
 - understanding registry updates 267
- personalizations, loading 190
- PF_OWNER script
 - editing 33
 - running 33
- PF_OWNER values, identifying
 - custom 32
- Planning and Budgeting
 - updating driver IDs 191
- platform changes, backing up before 98
- populating
 - Employee Total field 214
- portal
 - setting system options 189
- Portal
 - configuring 198
 - converting objects 89
 - running security synchronization 202
- Portal navigation objects, registering 200
- portal options data, updating 237
- Portal registry
 - updating permission lists 268
- Portal Solutions
 - copying database 267
 - upgrading PeopleTools 267
- Portal Solutions project, target
 - creating 269

- position budgeting, integrating with
 - Workforce Analytics 214
- PPLTLS84CUR project 75
- PPLTLS84CURDEL project 78
- PPLTLS84CURML project 76
- PPLTLS84CURTABLES script
 - editing 82
 - generating 82
 - running 83
- PPLTLSML project 77
- preparing
 - for the application upgrade 45
 - for the upgrade 39
 - Integration Broker deletes 93
 - upgrade job 5
- preserving
 - queries and trees 259
- preserving, local message node 135
- process request tables, updating 94
- Process Scheduler
 - configuring 125
- product license code, updating 66
- production database
 - identifying empty tables 38
- production database, copying 4
- project
 - PRESERVED 260
 - preserving queries and trees 260
- project definitions
 - exporting 128
 - importing 128
- project IDs, *See* project request IDs
- Project Portfolio Management
 - upgrading project request milestones 210
- project request IDs
 - identifying duplicates 27
 - resolving duplicates 31
 - upgrading 27
- project request milestones
 - upgrading 210
- projects
 - comparing queries and trees 261
 - copying 75
 - INITALTAUD 18
 - PATCH85X 79
 - PATCH85XML 79
 - PPLTLS84CUR 75
 - PPLTLS84CURDEL 78
 - PPLTLS84CURML 76

- PPLTLSML 77
- PT84TBLSPC 83
- PSLANGUAGES script
 - running 85
- PSOBJCHNG table, cleaning 40
- PT84TBLSPC project 83
- PTALTANLYZER 150
 - MTP pass 150
- PTUPGCONVERT 192
- PTUPGCONVERT program 91
- PTxxxTLS scripts
 - editing 56
 - running 85
- PUBGN01
 - running 47
- PUBGN02E.DMS
 - running 46
- PUBGN02I.DMS
 - running 46
- PUFTN01, running 48
- pupfnownermap03.dms script
 - editing 33
 - running 33
- PUPFX01, running 49
- PUPPKN01
 - running 48
- PUUPJ01
 - running 47

Q

- queries
 - Global Consolidations, enabling 21
 - Global Consolidations, evaluating duplicates 20
 - Global Consolidations, running 23
 - KPI manager, running 25
 - running Global Consolidations journal publish rule query 24
 - UPG_OWNER_MAP, running 32
 - UPG_PPK_PRJ_ID_DUP 27
- queries, preserving 259
- query prompt headings, converting 90

R

- re-creating
 - optional temporary tables 160
 - required temporary tables script 160
 - triggers 162
- reapplying customizations 199

- rebuild indexes script 1, running 123
- rebuild indexes script 2, running 123
- rebuild indexes script 3, running 123
- rebuild indexes script 4, running 124
- rebuild indexes script 5, running 124
- rebuild indexes script 6, running 124
- rebuild indexes script 7, running 124
- rebuild indexes script 8, running 125
- RecField
 - definitions 45
- recompiling
 - application rules 221
- record groups
 - exporting 167
 - importing 167
- record parameters
 - setting 163
- record suites
 - synchronizing (DB2) 215
 - synchronizing (non-DB2) 215
- records
 - migrating 83
 - setting parameters after copy 146
- refreshing
 - ChartFields 209
 - user-defined ledger templates 209
- registering Portal navigation objects 200
- registry permission lists, understanding updates 267
- registry, upgrading Content Provider 237
- reloading
 - data mapper rule set columns 217
- removing
 - duplicate data 182
- REN servers, updating configuration 88
- renaming
 - tables 132
- reporting conversion details 91
- resetting
 - database options flag 69
 - object version numbers 145
- resolving
 - duplicate project request IDs 31
- reviewing
 - Alter Audit, final 194
 - change control 238
 - conversion reports 113
 - copy results 141
 - create indexes log 162
 - initial audits 19
 - metadata audit results 224
 - Microsoft settings 99
 - new release changes 136
 - new release compare reports 136
 - non-comparable objects 137
 - Oracle settings 102
 - PeopleTools functionality 205
 - PeopleTools objects 73
 - system metadata, changed 181
 - system metadata, customized 182
 - system metadata, new 181
 - UPGCUST compare log 45
 - UPGCUSTIB copy results 144
 - UPGIBCOPY copy results 144
 - UPGNONCOMP copy results 144
 - UPGSYNCALL compare reports 130
- RNPFN01, Running SQL Rename Tool 152
- RNPFN02, Running SQL Rename Tool 152
- rowset cache, clearing 95
- rule set columns, data mapper 217
- running
 - alter analyzer loader 132
 - Alter Audit, final 193
 - Alter Audit, initial 19
 - alter tables script 161
 - alter timestamps script 1 121
 - alter timestamps script 2 121
 - alter timestamps script 3 121
 - alter timestamps script 4 122
 - alter timestamps script 5 122
 - alter timestamps script 6 122
 - alter timestamps script 7 122
 - alter timestamps script 8 123
 - alter with deletes script 178
 - application information queries 25
 - application security processing 218
 - audits 192
 - business unit PS/Query objects 228
 - character length script 1 109
 - character length script 2 109
 - character length script 3 109
 - character length script 4 109
 - character length script 5 110
 - character length script 6 110
 - character length script 7 110
 - character length script 8 110
 - CLS drop indexes script 1 107
 - CLS drop indexes script 2 107

- CLS drop indexes script 3 107
- CLS drop indexes script 4 107
- CLS drop indexes script 5 108
- CLS drop indexes script 6 108
- CLS drop indexes script 7 108
- CLS drop indexes script 8 108
- CLS rebuild indexes script 1 111
- CLS rebuild indexes script 2 111
- CLS rebuild indexes script 3 111
- CLS rebuild indexes script 4 111
- CLS rebuild indexes script 5 112
- CLS rebuild indexes script 6 112
- CLS rebuild indexes script 7 112
- CLS rebuild indexes script 8 112
- create indexes script 161
- create tables script 161
- create triggers script 179
- data conversion analyzer 173
- data conversion, for application changes 173
- data conversion, for PeopleTools changes 91
- DB2TMPIDXCREATE script 67
- DBTSFIX output scripts 65
- DBTSFIX script 55
- DDDAUDIT script, final 193
- DDDAUDIT script, initial 17
- DDLDB2 script 72
- DDLDBX script 72
- DDLIFX script 72
- DDLMSS script 73
- DDLORA script 72
- DDLSYB script 73
- Dimension Mapper ETL jobs 225
- DLPFUPN01 128
- drop indexes script 1 119
- drop indexes script 2 119
- drop indexes script 3 119
- drop indexes script 4 120
- drop indexes script 5 120
- drop indexes script 6 120
- drop indexes script 7 120
- drop indexes script 8 121
- EOUF_UPGRADE_FRAMEWORK 151
- Global Consolidations journal publish rule query 24
- Global Consolidations queries 23
- GRANT script 66
- initial audits 17
- KPI manager queries 25
- long data audit 98
- long to LOB script 1 104
- long to LOB script 2 105
- long to LOB script 3 105
- long to LOB script 4 105
- long to LOB script 5 105
- long to LOB script 6 106
- long to LOB script 7 106
- long to LOB script 8 106
- mass compile 216
- mass compile, second pass 223
- metadata audit 223
- Microsoft conversion report 100
- Microsoft conversion scripts 100
- new release UPGCUST 136
- new release upgrade copy 140
- PF_OWNER script 33
- Portal security synchronization 202
- PPLTLS84CURTABLES script 83
- PSLANGUAGES script 85
- PTUPGCONVERT program 91
- PTxxxTLS scripts 85
- PUBGN01 47
- PUBGN02E.DMS 46
- PUBGN02I.DMS 46
- PUFTN01 48
- pupfnownermap.dms script 32
- pupfnownermap03.dms script 33
- PUPFX01 49
- PUPPKJ02.DMS 31
- PUPPKN01 48
- PUUPJ01 47
- rebuild indexes script 1 123
- rebuild indexes script 2 123
- rebuild indexes script 3 123
- rebuild indexes script 4 124
- rebuild indexes script 5 124
- rebuild indexes script 6 124
- rebuild indexes script 7 124
- rebuild indexes script 8 125
- RNPFN01DB2 script 133
- RNPFN01DBX script 133
- RNPFN01MSS script 133
- RNPFN01ORA script 133
- RNPFN02DB2 script 134
- RNPFN02DBX script 134
- RNPFN02MSS script 134
- RNPFN02ORA script 135
- row count report 38

- SETINDEX script 145, 195
- SETSPACE script 146
- SETTABLE script 146, 195
- SQL rename tool 151
- SYSAUDIT script, final 193
- SYSAUDIT script, initial 18
- tablespace alter script 84
- TLSUPGNONCOMP script 86
- TSRECPPOP script 191
- UPGCOUNT script 38
- UPGCUST 43
- UPGCUST filter script 44
- UPGSYNC alter script 154
- UPGSYNCALL compare 130
- RUNSTATS.DAT, creating 69

S

- saving
 - application messaging objects 93
- Scorecard
 - fixing user defaults 233
 - fixing user security 231
 - preparing to upgrade 46
 - running KPI manager queries 25
- scripts
 - DB2 z/OS create table scripts 57
 - DB2 z/OS MTP import scripts 57
 - DB2TMPIDXCREATE 67
 - DBTSFIX, editing 55
 - DBTSFIX, running 55
 - DDDAUDIT 17
 - DDLDB2, running 72
 - DDLDBX, running 72
 - DDLIFX, running 72
 - DDL MSS, running 73
 - DDLORA, running 72
 - DDL SYB, running 73
 - DLUPX01E.DMS 166
 - DLUPX01I.DMS 166
 - DLUPX02E.DMS 167
 - DLUPX02I.DMS 167
 - editing DB2 upgrade planning 16
 - editing PUPPKJ02.DMS 30
 - GRANT 66
 - GRANT, editing 56
 - MVPRDIMP 58
 - PeopleTools 82
 - PF_OWNER, editing 33
 - PF_OWNER, running 33
 - PPLTLS84CURTABLES 82

- PSLANGUAGES 85
- PTxxxTLS scripts 85
- PTxxxTLS scripts, editing 56
- pupfnownermap.dms, running 32
- pupfnownermap03.dms, editing 33
- pupfnownermap03.dms, running 33
- RNPFN01DB2 133
- RNPFN01DBX 133
- RNPFN01MSS 133
- RNPFN01ORA 133
- RNPFN02DB2 134
- RNPFN02DBX 134
- RNPFN02MSS 134
- RNPFN02ORA 135
- running ALLTABS_ALTTLBL 161
- running ALLTABS_CRTTLBL 161
- running ALLTEMPTABS_
 - CRTTLBL 160
- running DLPFUPN01 128
- running PUBGN01 47
- running PUBGN02E.DMS 46
- running PUBGN02I.DMS 46
- running PUFTN01 48
- running PUPFX01 49
- running PUPPKJ02.DMS 31
- running PUPPKN01 48
- running PUUPJ01 47
- running UPGCRTTMPTBL_
 - CRTTLBL 160
- running UPGCRTTMPTBLOPT_
 - CRTTLBL 160
- SETINDEX 145
- SETSPACE 146
- SETTABLE 146
- SYSAUDIT 18
- TLSUPGNONCOMP 86
- UPGCOUNT 38
- security
 - granting home page personalization
 - access 202
 - loading PeopleTools definition security
 - group 87
 - running Portal security
 - synchronization 202
 - setting up 200
 - setting up, upgrade planning 15
 - synchronizing content reference
 - permissions 201
 - understanding setup 201
- security groups

- activating 210
- security processing
 - running 218
- security setup for PeopleSoft Planning and Budgeting 210
- servers
 - application servers 125
 - database servers 125
 - file servers 56
 - REN servers 88
- SET_CNTRL_REC table
 - copying for Budgeting 46
 - copying for Scorecard 46
- SETINDEX script 145, 195
- SETSPACE script 146
- SETTABLE script 146, 195
- setting 95
 - index parameters 145
 - menu pagelet values 190
 - object version numbers 95
 - portal system options 189
 - record parameters after copy 146
 - tablespace names 146
- setting up
 - security 200
 - security for upgrade planning 15
- settings
 - Microsoft, reviewing 99
 - Oracle, reviewing 102
- setup data
 - exporting 189
 - importing 189
- shrinking images 42
- software installation
 - verifying 2
- source blueprints
 - associating 227
- source lineage
 - generating 227
- source system IDs
 - assigning default 36
 - assigning table-specific 36
 - considerations for defining 34
 - defining 207
 - identifying default 35
- SQL rename tool
 - running 151
- SQL Rename Tool
 - running RNPFN01 152
 - running RNPFN02 152

- SQL Server
 - loading data model definitions 73
 - stamping the database 238
- statistics
 - DB2 UNIX/NT, updating 70
 - DB2 z/OS, updating 69
 - Informix, updating 70
 - Oracle, updating 70
 - updating 16
- stored statements data, loading 87
- string data, loading 87
- Sybase
 - loading data model definitions 73
- synchronizing
 - metadata 214
 - record suites (DB2) 215
 - record suites (non-DB2) 215
- synchronizing content reference
 - permissions 201
- SYSAUDIT script
 - running final 193
 - running initial 18
- system
 - messages, loading 73
 - tables, exporting 68
 - tables, importing 68
- system catalog views, updating 65
- system data
 - loading into upgrade table 181
- system metadata
 - deleting 182
 - reviewing, changed 181
 - reviewing, customized 182
 - reviewing, new 181
- system setup data
 - exporting 168
 - importing 168

T

- tables
 - creating a copy of DBField 46
 - moving to new tablespaces 84
 - PeopleTools system tables, updating 64
 - PeopleTools tables, re-exporting 262
 - PeopleTools, dropping 41
 - PSOBJCHNG 40
 - renaming 132
 - running row count report 38
 - system tables, exporting 68
 - system tables, importing 68

- tablespace step properties, editing 62
- tablespaces
 - alter script 84
 - alter script, building 84
 - alter script, editing 84
 - creating custom 148
 - creating delivered 147
 - creating new 147
 - migrating records to 83
 - populating data 79
 - setting names 146, 163
 - setting names for temporary tables 163
 - updating names 81
- target values, updating 143
- temporary tables
 - re-creating optional 160
- temporary tables script
 - building optional 157
- temporary tables, setting tablespace names 163
- testing
 - after the upgrade 244
 - backing up before 239
 - Copy of Production 239
 - Move to Production 241
 - preserved queries and trees 262
- time data types, converting 114
- TLSUPGNONCOMP script
 - running 86
- trace
 - turning off 177
 - turning on 176
- transparent data encryption
 - enabling 206
 - saving information 70
- Tree/Query Copy of Production
 - database 260
- trees, preserving 259
- triggers, re-creating 162
- TSRECPOP script, running 191
- turning off change control 71

U

- updates
 - applying before data conversion 172
- updating
 - Configuration Manager profile 54
 - database options 114
 - database options for timestamp 67
 - database overrides 145

- Integration Broker defaults 92
- KPI dimension member
 - descriptions 236
- language data 191
- object version numbers 192
- PeopleTools patch information 67
- PeopleTools system tables 64
- Planning and Budgeting driver IDs 191
- portal options data 237
- process request tables 94
- product license code 66
- REN server configuration 88
- statistics for DB2 UNIX during
 - application changes 164
- statistics for DB2 UNIX/NT 70
- statistics for DB2 z/OS 69
- statistics for DB2 z/OS during application changes 164
- statistics for Informix 70
- statistics for Informix during application changes 164
- statistics for Oracle 70
- statistics for Oracle during application changes 165
- statistics, initial 16
- system catalog views 65
- tablespace names 81
- target values 143
- updating statistics
 - DB2 UNIX/NT 70
 - DB2 z/OS 69
 - Informix 70
 - Oracle 70
- UPG_OWNER_MAP query
 - running 32
- UPG_PPK_PRJ_ID_DUP query 27
- UPGCOUNT script, running 38
- UPGCUST
 - copying 141
 - reviewing compare log 45
 - running a compare 43
 - running filter script 44
 - running new release 136
- UPGCUSTIB
 - reviewing copy results 144
- UPGDATAConv process, using 281
- UPGIB
 - copying 143
 - creating 136
- UPGIBCOPY

- reviewing copy results 144
- UPGNONCOMP
 - copying 143
 - reviewing copy results 144
- UPGOPT project
 - applying 14
 - building 14
- upgrade
 - compare reports, understanding 296
 - configuring environment 198
 - database preparation 13
 - databases, defined 2
 - getting started 13
 - notes and tips 3
 - PeopleTools, backing up after 125
 - preparing for 39
 - setting up upgrade planning security 15
 - user, verifying 52
- upgrade copy, running 140
- upgrade defaults
 - exporting 170
 - importing 171
- Upgrade Drivers page
 - accessing 290
 - adding new section 291
 - inactivating section 291
 - using 289
- upgrade job
 - preparing 5
- upgrade planning files, applying 14
- upgrade projects
 - creating 156
- upgrade table
 - loading system data 181
- upgrade tables script
 - recreating 156
- upgrading
 - business unit mappings 225
 - consolidation processes 211
 - Content Provider registry 237
 - Global Consolidations journal publish mapper rules 230
 - OBJECTOWNERID values 31
 - OWE 34
 - Portal Solutions PeopleTools 267
 - preparing for 45
 - project request IDs 27
 - project request milestones 210
 - Workforce Analytics 213
- UPGSYNC alter script

- building 153
 - editing 153
 - running 154
- UPGSYNC project
 - copying 131
 - copying definition 131
- UPGSYNCALL compare
 - reviewing reports 130
 - running 130
- UPGSYNCTEMP project
 - copying 131
- user IDs
 - associating to employee IDs 27
- user interface
 - changing the style 251

V

- validating
 - business unit mappings 229
 - Microsoft database 98
 - Oracle database 100
- verifying
 - database integrity 39
 - software installation 2
 - upgrade user 52
- version numbers
 - setting 95
 - updating 192
- views
 - creating all 180
 - creating PPLTOOLS 91

W

- warehouse
 - defining sources 226
- web server
 - configuring 198
- Workforce Analytics
 - integrating with position budgeting data 214
 - upgrading 213